Managing Compensation and Benefits Using Oracle HRMS (US)

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Preface

Audience for This Guide

Welcome to Release Release 11*i* of the Managing Compensation and Benefits Using Oracle HRMS (US) user guide.

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, we suggest you attend one or more of the Oracle® HRMS training classes available through Oracle University.
- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User Guide.*

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This guide contains the information you need to understand and use Oracle® HRMS.

This preface explains how Volume 1 of Managing Compensation and Benefits Using Oracle HRMS is organized and introduces other sources of information that can help you. This guide contains the following chapters:

- Chapter 1 describes compensation and benefits setup; specifically, compensation management, compensation as it relates to payroll, and introduces the three Oracle HRMS models of benefits for the US market: Basic, Standard, and the optional Advanced Benefits module.
- Chapter 2 concentrates on compensation entry and analysis. Specifically the chapter discusses batch processes, rule–based approaches to compensation, and how to analyze compensation over time and across employee groups.
- Chapter 3 discusses basic benefits, one of the three benefit models available for the US market.
- Chapter 4 is about salary administration, and how you can model salary changes for employees, associate salary changes

with performance reviews, and use market surveys for analysis purposes.

- Chapter 5 describes how Oracle HRMS tracks absences and PTO accruals, and the various business rules and other tailoring methods available to you.
- Chapter 6 details the various ways you can work with earnings in Oracle HRMS, and discusses earning types, overtime, shift pay, and various imputed earnings types, such as GTL and company cars.
- Chapter 7 is about non–tax deductions, such as for benefits or other voluntary deductions.
- Appendix A is a listing of all the windows in the system and gives the default navigation path to each. Additionally all the reports available in Oracle HRMS are listed in this appendix as well.

Finding Out What's New

From the HTML help window for Oracle® HRMS, choose the section that describes new features or what's new from the expandable menu. This section describes:

- New features in 11*i*. This information is updated for each new release of Oracle® HRMS.
- Information about any features that were not yet available when this user guide was printed. For example, if your system administrator has installed software from a mini pack as an upgrade, this document describes the new features.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle® HRMS.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides unless we specify otherwise.

Online Documentation

All Oracle Applications documentation is available online (HTML and PDF). The technical reference guides are available in paper format only. Note that the HTML documentation is translated into over twenty languages.

The HTML version of this guide is optimized for onscreen reading, and you can use it to follow hypertext links for easy access to other HTML guides in the library. When you have an HTML window open, you can use the features on the left side of the window to navigate freely throughout all Oracle Applications documentation.

- You can use the Search feature to search by words or phrases.
- You can use the expandable menu to search for topics in the menu structure we provide. The Library option on the menu expands to show all Oracle Applications HTML documentation.

You can view HTML help in the following ways:

- From an application window, use the help icon or the help menu to open a new Web browser and display help about that window.
- Use the documentation CD.
- Use a URL provided by your system administrator.

Your HTML help may contain information that was not available when this guide was printed.

Related User Guides

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.

If you do not have the hardcopy versions of these guides, you can read them online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD, or by using a Web browser with a URL that your system administrator provides.

User Guides Related to All Products

Oracle Applications User Guide

This guide explains how to navigate the system, enter data, and query information, and introduces other basic features of the GUI available with this release of Oracle® HRMS (and any other Oracle Applications product).

You can also access this user guide online by choosing ”Getting Started and Using Oracle Applications” from the Oracle Applications help system.

Oracle Alert User Guide

Use this guide to define periodic and event alerts that monitor the status of your Oracle Applications data.

Oracle Applications Implementation Wizard User Guide

If you are implementing more than one Oracle product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. This guide describes how to use the wizard.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards*. It also provides information to help you build your custom Developer/2000 forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

User Guides Related to This Product

Using Oracle HRMS – The Fundamentals

This user guide explains how to setup and use enterprise modeling, organization management, and cost analysis. It also includes information about defining payrolls.

Managing People Using Oracle HRMS

Use this guide to find out about using employee management, recruitment activities, career management, and budgeting.

Running Your Payroll Using Oracle HRMS

This user guide provides information about wage attachments, taxes and social insurance, the payroll run, and other processes.

Managing Compensation and Benefits Using Oracle HRMS

Use this guide to learn about compensation setup, entry and analysis, setting up basic, standard and advanced benefits, salary administration, and absence management and PTO accruals.

Customizing, Reporting and System Administration

This guide provides information about extending and customizing Oracle HRMS, managing security, auditing, information access, and letter generation.

Implementing Oracle HRMS

This user guide explains the setup procedures you need to do in order to successfully implement Oracle HRMS in your enterprise.

Implementing Oracle Self–Service Human Resources (SSHR)

This guide provides information about setting up the self–service human resources management functions for managers and employees. Managers and employees can then use an intranet and Web browser to have easy and intuitive access to personal and career management functionality

Using Oracle FastFormula

This guide provides information about writing, editing, and using formulas to customize your system. Oracle FastFormula provides a simple way to write formulas using English words and basic mathematical functions. For example, Oracle FastFormula enables you to specify elements in payroll runs or create rules for PTO and accrual plans.

Using Oracle Training Administration (OTA)

This guide provides information about how to set up and use Oracle Training Administration to facilitate your training and certification business.

Using Oracle SSP/SMP

This guide provides information about setting up and using Oracle SSP/SMP to meet your statutory sick pay and statutory maternity pay obligations.

Using Application Data Exchange and Hierarchy Diagrammers

This guide provides information about using Application Data Exchange to view HRMS data with desktop tools, and upload revised data to your application. This guide also provides information about using Hierarchy Diagrammers to view hierarchy diagrams for organizations and positions.

Oracle Business Intelligence System Implementation Guide

This guide provides information about implementing Oracle Business Intelligence (BIS) in your environment.

BIS 11*i* User Guide Online Help

This guide is provided as online help only from the BIS application and includes information about intelligence reports, Discoverer workbooks, and the Performance Management Framework.

Using Oracle Time Management

This guide provides information about capturing work patterns such as shift hours so that this information can be used by other applications such as General Ledger.

Oracle Applications Flexfields Guide

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

Installation and System Administration Guides

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind, and major issues, for Applications–wide features such as Business Intelligence (BIS), languages and character sets, and self–service applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle One–Hour Install, which minimizes the time it takes to install Oracle Applications and the Oracle 8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle One–Hour Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process in general and lists database upgrade and product–specific upgrade tasks. You must be at either Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0 to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Using the AD Utilities

Use this guide to help you run the various AD utilities, such as AutoInstall, AutoPatch, AD Administration, AD Controller, Relink, and others. It contains how–to steps, screenshots, and other information that you need to run the AD utilities.

Oracle Applications Product Update Notes

Use this guide as a reference if you are responsible for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features and enhancements and changes made to database objects, profile options, and seed data for this interval.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage processing.

Oracle HRMS Applications Technical Reference Guide

This reference guide contains database diagrams and a detailed description of database tables, forms, reports, and programs for Oracle HRMS, including Oracle® HRMS and related applications. This information helps you convert data from your existing applications, integrate Oracle® HRMS with non–Oracle applications, and write custom reports for Oracle® HRMS.

You can order a technical reference guide for any product you have licensed. Technical reference guides are available in paper format only.

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications–embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow–enabled processes.

Training and Support

Training

We offer a complete set of training courses to help you and your staff master Oracle Applications. We can help you develop a training plan that provides thorough training for both your project team and your end users. We will work with you to organize courses appropriate to your job or area of responsibility.

Training professionals can show you how to plan your training throughout the implementation process so that the right amount of information is delivered to key people when they need it the most. You can attend courses at any one of our many Educational Centers, or you can arrange for our trainers to teach at your facility. We also offer Net classes, where training is delivered over the Internet, and many CD multimedia–based courses. In addition, we can tailor standard courses or develop custom courses to meet your needs.

Support

From on–site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle® HRMS working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

We STRONGLY RECOMMEND that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications tables, unless we tell you to do so in our guides.

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 Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications forms, you might 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 Applications.

When you use Oracle Applications forms to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. But, 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.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support and office automation, as well as Oracle Applications, an integrated suite of more than 45 software modules for financial management, supply chain management, manufacturing, project systems, human resources and sales and service management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers, and personal digital assistants, enabling organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest independent software company. Oracle offers its database, tools, and application products, along with related consulting, education and support services, in over 145 countries around the world.

Your Feedback

Thank you for using Oracle® HRMS and this user guide.

We value your comments and feedback. At the back of this guide is a Reader's Comment Form you can use to explain what you like or dislike about Oracle® HRMS or this user guide. Mail your comments to the following address or call us directly at (650) 506–7000.

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Or, send electronic mail to **appsdoc@us.oracle.com**.

CHAPTER

1

Compensation and Benefits Setup

Compensation and Benefits Setup

Oracle HRMS provides an integrated solution for Human Resources and Payroll. Therefore your setup of compensation and benefits supports both compensation management and payroll management.

Compensation Management

What kinds of compensation information can you record?

All kinds, depending on how much information you require. You decide what types of compensation and benefits you want to track, the information you need to hold for each type, and the rules that determine who receives the compensation and how often it is paid.

Can you monitor the costs of compensation policies?

Yes, you can allocate labor costs to particular departments, products, or projects. You can enter default cost centers for organizations and employees, then override these, if required, when you enter timecard data.

How can you review the effectiveness of compensation packages?

You can compare salaries and other compensation for any groups of employees, for example grouped by organization, position or grade. You can break down salary changes into components, such as Cost of Living, Location Adjustment, or Promotion, to identify any performance–related increases. You can also associate salary changes with performance reviews.

Using HRMS Intelligence, you can compare salary trends, manpower changes, and group skills analyses.

What happens when you need to change compensation policies?

With DateTrack you can make future–dated changes to your information safe in the knowledge that these changes will not become effective in the system until the correct date.

In this way you can use your compensation and benefit information to plan changes ahead of time; analyze the impact of these changes; adjust these changes and generally smooth out the workload that is often associated with major changes in compensation and benefits policy.

How do you manage individual salary packages?

You can define salaries for groups of employees, with default values and validation rules if you require them, and enter individual salary changes for employees at any time. You can associate salary changes with the results of performance reviews, and you can show the composition of any increase by components such as cost of living, and individual performance. You can enter proposed changes to take effect in the future and confirm these later with the click of a button.

What about grade–related pay?

Oracle HRMS handles both pay rates that are directly related to grades, and rates on grade–related pay scales. To relate pay directly to grades, you can specify valid salary ranges or fixed pay rates for each grade. If your employees are paid from a pay scale (perhaps determined by collective agreement), you can associate each grade with several points on a pay scale.

What does Oracle offer for benefits administration?

We offer a choice, to match the varying complexity of benefits administration requirements.

The **Standard Benefits** feature set lets you define your benefits offering in a hierarchical manner, so that requirements you specify at the program level are inherited by the plans and options in that program. You can use a variety of factors, such as length of service, to define eligibility requirements for participation in a plan. The system supports centralized enrollment by benefit administrators or web–based self–service enrollments. Standard benefits is best for organizations that outsource a significant portion of their benefits administration. System extract features let you export data to third party benefits administrators.

If you administer your own benefits, or your requirements include offering flexible benefit plans, you should implement **Oracle Advanced Benefits**. This provides the full solution for benefits management, including life event triggered enrollments and communications, online life event processing, processing of flexible spending account claims, and what–if eligibility analysis.

For US implementations, we also continue to offer **Basic Benefits**, which is a limited feature set that supports administration of benefit plans for employees and their dependents, including COBRA coverage.

How do you record absence entitlement?

As with all benefits, you can decide the type of absences you want to track and the information you want to record. You can create Paid Time

Off (PTO) accrual plans with your own rules defining how much time can be accrued, when it must be used, how much time can be carried forward to a new plan period, and so on. Oracle HRMS provides reports and windows for monitoring each type of absence for groups or individuals.

Can you be sure that compensation information remains confidential?

Yes, you can. Oracle HRMS security features enable you to choose which users can view compensation information, what types of compensation they need access to, which employees records they can see, and whether they are able to update them.

Payroll Management

How do you enter compensation values for the payroll run?

Some values, such as salary, can be entered once and used in every payroll run (or periodic runs) until you need to update them. Other values, such as hours worked, need to be entered or calculated fresh for each run.

You can do one of the following:

- Use default values (which may be different for groups of employees)
- Enter values employee–by–employee
- Enter values in a batch
- Leave it to the system to enter values based on calculations performed during the payroll run

You can define validation rules to minimize data entry errors.

Can Oracle Payroll handle complex calculations?

Yes it can, through its use of formulas to specify calculations for each earnings or deduction. These formulas use values from the HRMS database and can include conditional logic to perform different calculations for different groups of employees. For example, they can check balances or employee status to control how to process the earning or deduction. Many of the formulas you need, for example for tax calculations, are supplied with Oracle Payroll.

How do you control when each earning or deduction is processed?

The sequence of processing in a payroll run is determined by classifications, such as Pre–tax Deductions and Tax Deductions. You can also prioritize the processing for an individual employee, for example to determine the order in which deductions are processed for wage attachments.

You control whether any value is processed just once, in every payroll run, or periodically (such as once a quarter). Your formulas can also change or stop the processing of an earning or deduction during a run, based on employee status.

How do you accumulate and review balances?

The system can accumulate balances of payroll run results or values entered before the run. You can accumulate a balance over different time dimensions such as current run, month, and year to date. You can review balances after payroll processing and use balances to control the processing performed in the payroll run.

Can I set up new balances, for the values that are important to my company?

Yes, you can define whatever additional balances your enterprise requires. For example, you may require a Pensionable Earnings balance for a defined benefit pension plan your enterprise offers employees.

Overview

Using Oracle HRMS, you have all the flexibility you need to model your compensation and benefit packages. You decide exactly what information you want to hold for compensation management and, if you require it, for payroll processing.

This functional area concentrates on the generic concepts and procedures for setting up compensation, including earnings and deductions for payroll processing. However, there are additional considerations for salaries, absences and PTO accruals, and benefit plans. These are covered in separate functional areas.

Benefits Administration

Oracle Human Resources includes Standard Benefits, to help you set up and manage benefits plans and programs. For an additional license fee, you can implement the extra features of Flex Benefits.

- Standard Benefits enables you to set up a hierarchy of benefit offerings (program, plan type, plan, option), and supports program–based enrollment for fixed and core–plus–options arrangements, self–service enrollment, rules–based plan eligibility, and exporting data to a third party administrator.
- Flex Benefits is the full solution to benefits administration for employers who administer their own benefits, including flexible benefit plans. It uses all the features of Standard Benefits and provides additional functions such as life event triggered enrollments and communications, online life event processing using Oracle Workflow, processing of flexible spending account claims, and what–if eligibility analysis.

For compatibility with earlier releases, Oracle HRMS continues to support Basic Benefits. It provides you with a limited set of features for managing benefits for employees and their dependents, including continued coverage (under COBRA). To implement new features for benefits administration, you need to upgrade to Standard Benefits.

Constituents of the Compensation Model

Setting up compensation and benefits in Oracle HRMS involves defining and customizing a number of items, and choosing rules for data entry and processing.

- **Elements** are the building blocks that represent all types of earnings, deductions, payments, and benefits.

- **Earnings and deductions** are required for payroll processing. Some are predefined (including all tax deductions). You can initiate others to generate elements, along with formulas, balances, and other items required for the payroll run.
- **Input values** are the 'fields' you define for each element, specifying the information to be recorded (such as hours worked, monetary values, or benefit coverage levels).
- **Rules for allocating compensation** are set up by linking each element to components of employee assignments, such as organizations and grades. Employees are not eligible for elements unless they 'match' the link rules.
- **Fast, reliable compensation entry** is enabled by customizing the Element Entries window and setting up defaults, validation, and other rules to control what entries can be made. You can also set up elements for automatic entry.
- **Formulas** perform the calculations that produce **payroll run results**.
- An element's **pay value** is a special input value that stores the run result.
- **Element classifications**, such as Earnings and Voluntary Deductions, control element processing, including **processing sequence** and the balances an element feeds.
- **Payroll balances** show the positive or negative accumulation of particular values over periods of time (called dimensions).
- **Compensation policy changes** are made easier by DateTrack, which enables you to make changes in advance and to keep a record of every definition and value as it changes over time.

Earnings and Deductions

Oracle Payroll comes with certain earnings types and deductions ready for you to use. You *initiate* the other earnings and deductions you need, as well as non–payroll payments such as expense reimbursements.

The predefined earnings types are:

- Regular Salary and Regular Wages: page 6 – 4
- Overtime: page 6 – 10
- Shift Pay: page 6 – 13
- GTL (Group Term Life) Imputed Income: page 6 – 15
- Company Car: page 6 – 17

The predefined deductions are:

- Wage Attachments, see: Running Your Payroll Using Oracle HRMS
  - Child Support
  - Federal, State and Local Tax Levies
  - Creditor Garnishment

These earnings and deductions come with their elements, input values, balance feeds, formulas, processing rules and result rules already in place, and available for review.

Tax Deductions

In addition to the earnings and deductions mentioned above, Oracle Payroll comes with **all current federal, state and local–level tax deductions** already in place. Oracle Corporation has made an agreement with Vertex Inc. to provide this data.

To set up these deductions, you enter the appropriate information for each GRE in the Federal, State and Local Tax Rules window. You do not need to create element links for these deductions, unless you want to do specific tax balance adjustments. Your system administrator receives tax updates from Vertex Inc., and applies them as necessary.

User-Initiated, System-Generated Earnings and Deductions

To supplement the earnings types and deductions included in your startup data, you initiate earnings types, payments and deductions that accord with your own compensation policies and practices. After you choose the appropriate processing and amount rules in the Earnings or Deduction window, the system generates:

- An element for the earnings, payment or deduction, with all necessary input values, balances and balance feeds
- A formula that utilizes the input values, together with a processing rule for the formula.

Once you create links for the earnings, payments and deductions you initiate and make entries to their input values, they are ready for use in payroll runs.

If the generated components of an earnings or deduction do not precisely meet your needs, you can make certain modifications to them. See: Customizing Generated Elements, Formulas, and Balances: page 1 – 59

Earnings and Deductions: Reviewing

You can review at any time the earnings types, non–payroll payments and deductions you initiate in Oracle Payroll, as well as the earnings and deductions included with the system. After running payroll processing, you can review the earnings and deductions balances, as well as tax balances, existing for individual employees.

The earnings types included in Oracle Payroll are:

- Regular Salary and Regular Wages: page 6 – 4
- Overtime: page 6 – 10
- Shift Pay: page 6 – 13
- GTL (Group Term Life) Imputed Income: page 6 – 15
- Company Car: page 6 – 17

The included non–tax deductions are:

- Wage Attachments, see: Running Your Payroll Using Oracle HRMS
  - Child Support
  - Federal, State and Local Tax Levies
  - Creditor Garnishment

  Note: When reviewing earnings or deductions you may find two with the same name, the second however including the words "Special Inputs" (for example, Regular Salary and Regular Salary Special Inputs). The special inputs element exists to provide a convenient way to enter a change to an earnings or deduction before a payroll run.

See Also

Reviewing Earnings and Deductions Structures: page 1 – 57

Reviewing Earnings and Deductions Balances: page 1 – 10

Viewing Tax Balances, see: Running Your Payroll Using Oracle HRMS

The *Accrued* Balance

This balance exists only for deductions with a stop rule of Total Reached. It holds the amount accumulated to date toward the total.

See: Deduction Start and Stop Rules: page 7 – 4

The *Arrears* Balance

This balance exists only for deductions for which the system holds arrearage when employee earnings are insufficient to cover the deduction's full amount. The arrears balance holds any amounts not taken but held in arrears.

The *Toward Bond* Balance

This balance exists only for deductions taken for the purchase of Series EE bonds. It holds the amount accumulated to date toward purchase of a bond.

See: Series EE Bond Deductions: page 7 – 7

The *Able* Balance

This balance exists only for pretax deductions you initiate that do not fit in the categories Deferred Comp 401k, Health Care 125 or Dependent Care 125. For a pretax deduction such as this, you may require a balance fed by earnings types subject to the deduction. This is the Able balance that you can review here.

When you initiate a pretax deduction requiring this balance, the system generates the balance, but you must manually enter the earnings types that feed it. You may also need to modify the generated formula for the deduction so that it references this balance.

See: Defining User Balances: page 1 – 52

> **Note:** To view tax balances for individuals, use the View Tax Balances window.
>
> Viewing Tax Balances, see: Running Your Payroll Using Oracle HRMS

Elements: Building Blocks of Pay and Benefits

With Oracle HRMS you define a working model of your own *types* of compensation and benefits, and the policies or business rules that govern the allocation of these to your employees. You define these types as elements. Elements are the building blocks of pay and benefits, both for HR analysis and payroll processing.

Elements can represent:

- Earnings, such as salary, wages, and bonuses
- Benefits, such as employee stock purchase and pension plans
- Absences from work
- Non–payroll payments, such as expense reimbursements
- Tangible items distributed to employees, such as tools, uniforms, mobile phones, or computers
- Voluntary and involuntary deductions, as well as pre–tax and tax deductions
- Employer taxes and other employer liabilities

There is no limit to the number of elements you can define and all your definitions are datetracked.

How Are Elements Created?

Some elements are supplied predefined with Oracle HRMS, others are generated by the system when you define certain types of compensation and benefits, and the remainder you can define to best meet the needs of your own enterprise.

Predefined Elements

The predefined elements are specific to your localization. They typically include deductions for tax and wage attachments. They may also include standard earnings, such as salary. You should not make any changes to these predefined elements.

Generated Elements

When you create PTO Accrual Plans, the system generates elements for you. When Oracle Payroll users in the US initiate earnings and deductions, the system generates elements, along with balances, balance feeds, and formulas.

Input Values: Flexible Description of Compensation

To give an employee an earning or deduction, you make an element entry. An entry can contain up to 15 items of information, which you define when you create the element. For example, for a company car element, you might want to store car make, model, year, date of issue to the employee, and mileage when issued.

These items of information are called input values. You decide what validation to apply to these values, whether they are required or optional, and the type of information they can accept:

- Alphabetic characters or words
- Integers or numbers
- Money
- Hours and minutes
- Date, day or time

Processing Input Values

Input values are so called because they are the inputs to calculations performed by Oracle Payroll. In a payroll run, formulas process the input values and other database information to produce *run results*.

For example if you have Payroll and your enterprise makes overtime payments, you might write a formula to calculate the payment amounts for each assignment from inputs of the overtime rate and the hours worked for the period. The payroll run then processes each assignment and produces the overtime payment amounts as run results.

Rules for Allocating Compensation

While some elements may represent compensation, equipment, or deductions available to all employees, many elements are available only to certain groups of employees. For example, your enterprise may provide company cars only to employees in the Sales Department.

To determine which employees are eligible for an element, you build links to the assignment components that employees must have to receive entries of the element. Links rule out the possibility of employees getting element entries by mistake.

For example, you might want to give a production bonus only to those employees who work full time in Production and are on the weekly payroll. To do this you would define a link between the element Production Bonus and the combination of the Production organization, the Full–Time employment category and the Weekly payroll.

> **Note:** When you define a link for a **benefit**, do not select any assignment components to restrict eligibility for the benefit. Instead use participation eligibility profiles.

Assignment Components

The assignment components to which you can link elements are:

- **Payroll**: If employees on all your payrolls are eligible for an element, you can link it to **all payrolls**.
- **Salary basis**, which establishes the period of time (often hourly or monthly) for which you quote the employee's salary or wages.
- **Employment category**, for example, Full Time–Regular or Part Time–Temporary
- **Organization,** for example department or section, in which employees work
- **Location** of employee's office
- **Job**, for example, Associate Professor or Secretary
- **Grade**
- **Groups** to which the employee belongs: You set up all the groups that are appropriate for your enterprise. For example, you could decide to group employees by company within a multi–company enterprise, and by union membership.
- **Position,** which is a class of job performed in a particular organization, for example, Associate Professor of Chemistry, or Finance Department Secretary.

Multiple Rules of Eligibility

You can define more than one link for each element but there must be no overlap between the eligibility criteria for the links. For example, you could create one link to the combination of grade 'A' and the job 'Accountant'. However, you could not create one link to grade 'A' and a second link to the job 'Accountant'. This would imply that an accountant on grade A is eligible for the same element twice.

If you have more than one link for an element, you can enter different default values, qualifying conditions, and costing information for each eligibility group.

Qualifying Conditions: Minimum Age or Period of Service

An employee might be eligible for an element and yet not receive it because he or she does not meet other qualifying conditions.

Two common qualifying conditions are a minimum age or a minimum period of service in the current assignment. You can define these conditions when you define the element. You can enter or adjust these conditions when you define the element links so that you have different qualifying conditions for different groups of assignments.

These qualifying conditions are checked automatically when you try to enter an element for an employee.

Compensation Entry: Making It Fast and Reliable

To reduce the work of entering compensation information for employees and to reduce the risk of errors, you specify rules about entries when you define an element. For example:

- You can specify defaults, lookups, minimum and maximum values, or other validation to control what is entered in input values.
- You also specify the duration of entries, that is, whether they are valid for one pay period only, or whether they persist until further action is taken to end the entry.
- For some elements, you can even set up automatic entry with default values so that no action is required to ensure that employees get the compensation for which they are eligible.

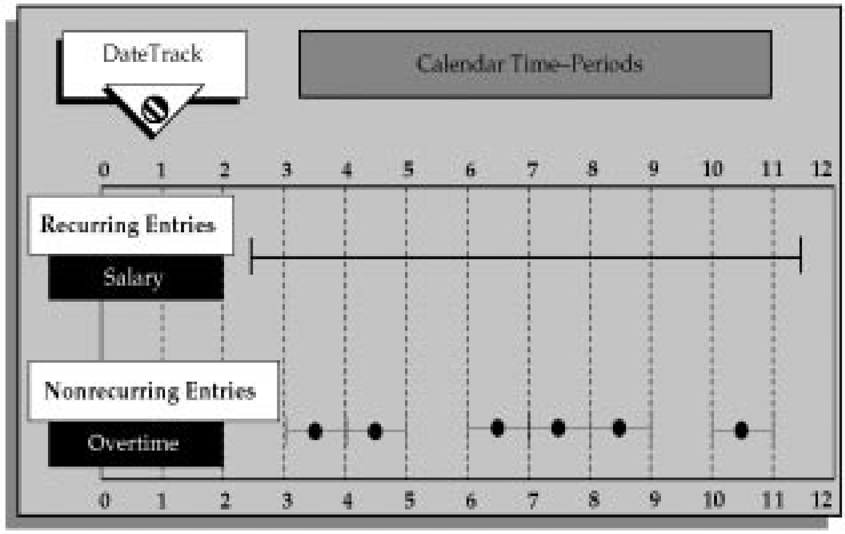
You can create customized versions of the Element Entries window. A customized version might restrict the elements a user can enter. This enhances speed, usability, and security for specific data entry scenarios. Users can also enter batches of entries using default values to reduce keystrokes and thus speed up data entry and reduce errors.

Duration of Element Entries

Some entries are valid for one pay period only. For example, to produce an employee's wages or overtime pay for a period you process the entries of regular hours worked or overtime hours. You define these elements with the processing type *nonrecurring*. Notice that pay periods are determined by the payroll to which an employee is assigned. Employees must be assigned to a payroll to receive nonrecurring elements, even if you are entering these for information only and not processing them.

Other entries, such as salary or company car, should persist until you change them, or they reach their end date, or the employee's assignment changes so that he or she is no longer eligible for the element. You define these elements with the processing type *recurring*.

Figure 1 – 1 Element Entry Validity Across Pay Periods



A recurring element entry is normally processed in every pay period, as determined by the employee's payroll. However, you can associate frequency rules with a recurring element to specify in which pay periods it should process. For example, you might deduct a monthly subscription in the second week of each month for weekly–paid employees.

Allowing Multiple Entries

Normally you can only give an employee one entry of an element. This is a useful safeguard against duplication errors. However, when you define an element, you can choose to allow multiple entries. For example, if you enter overtime hours on a weekly basis for monthly–paid employees, you might need to give an employee five entries of an overtime element in each period.

Automatic Entry

If you want all eligible employees to receive a recurring element automatically, you can define *standard* links to the element. With this link, the element and all its default input value entries go on record for all eligible employees, now and in the future.

For example, suppose your enterprise has an employee Sports Club whose members all agree to pay a fixed subscription each month by payroll deduction. You can set up an employee group called Sports Club on the system and record membership by assigning employees to the group. You can then link a Sports Club Dues element to the Sports Club employee group, mark this link as standard, and enter a default value reflecting the current monthly subscription.

Clearly, you will not choose to create standard links if there are any performance criteria (such as achieving a certain volume of sales) that employees must meet before they qualify for an element.

You can create a standard link if both the element is recurring and multiple entries are *not* allowed for the element

If you have not defined age or period of service criteria, the start date of the automatic entry is the date the assignment becomes eligible for the element. For example, this might be the employee's hire date, or the date of a promotion or transfer.

If you entered age or period of service criteria for the element, the start date of the automatic entry reflects the date on which the employee meets the qualifying conditions. For example, if a new hire is entitled to a company car after six months, an element entry is automatically created when the employee is entered on the system, and the start date of the entry is six months after the hire date.

If the employee's date of birth is altered on the system, this may change the date on which he or she qualifies for the element. In this case, the start date of the element entry changes automatically.

Default Values and Validation

When you define inputs for an element, you also define the validation for each input value. The validation you define controls the values a user can enter. The options are to:

- Provide a default value (or several defaults – one for each eligibility group, defined by a link)
- Provide a minimum and maximum value range
- Provide a fixed value
- Provide a lookup list of valid values
- Validate the input value using a formula

Using the formula option you can model complex business rules for validating entries. For example, for a bonus payment you might want to set a maximum bonus value that depends on length of service and current salary. With Oracle's formula writing tool, Oracle FastFormula, you can include conditional logic to validate input values using different criteria for different employees.

If you define a default value, you can specify that it is a *hot default*. This means that any changes to the default value not only affect future entries but will also update existing entries, provided that the default was not overridden when the entry was made.

Batch Entry

Using BEE (Batch Element Entry), you can enter earnings, deductions, timecard data, and other compensation and benefit information in batches. This is especially useful when the same values can be used for many employees. After entering a batch (for as many employees and elements as you require), you can validate it, make corrections, and validate again before transferring the information to the database.

Customizing the Element Entries Window

You can create customized versions of the Element Entries window. A customized version restricts the elements a user can enter. For example, one version could be restricted to the element name Timesheet and accessed from a menu entry labelled Timesheet Entries.

Element entry can be restricted by:

- Element set (that is, a group of elements that you define)
- Element type (that is, recurring or nonrecurring)
- Element classification (such as, Earnings, or Direct Payment)

See: Windows You Can Customize, *Customizing, Reporting and System Administration in Oracle HRMS*.

Formulas and Payroll Run Results

Elements are processed during payroll runs according to the business rules for each element that you define at setup. Many of these rules are defined in formulas, written using Oracle FastFormula. Formulas specify how the payroll run should perform calculations for the element.

For example, this is a basic formula for the calculation for the element Wages:

```
Wages = Hours Worked in Week x Wage Rate
```

The processed results for each element are called the *run results*. They become *balance feeds* for different balances. Some balance feeds are predefined to feed required statutory balances, and you can create your own balance feeds to your own user defined balances.

Formula Inputs from Input Values or Database Items

Formulas obtain some of the data they need from entries to their element's input values. The Wages formula above, for example, could locate each employee's hours worked as an entry to the input value Hours of the Wages element.

Formulas can also obtain information from *database items*. Much of the information in the Oracle HRMS database, including extensive information on employees and their assignments, is available to formulas as database items. For example, the Wages formula can locate each employee's wage rate as a database item.

Varying the Processing by Employee Group or Statuses

There are several ways to vary the processing performed by formulas:

- You can use conditional logic (IF..THEN) within a formula to perform different calculations depending on any information taken from input values or database items (such as length of service).
- You can associate more than one formula with an element, each triggered by a different assignment status (such as Active Assignment or On Sabbatical).
- You can use one formula but associate different formula results with each assignment status.
- You can associate a skip rule formula with an element. This formula can check balances, other element entries, the

assignment status or any other database items to determine whether the payroll run should process the element for an assignment.

Types of Formula Results

Formulas can produce different types of run results:

- The *direct result* is the amount of an earnings or deduction, for example, the dollar amount of wages an employee has earned that week. As well as calculating the amount to be paid, direct results can be used for costing purposes and analysis (such as tracking hours of overtime).
- *Indirect results, updates,* and *stops.* A formula result can make an entry to the input value of another element for its formula to use. An indirect result is an entry to a nonrecurring element. An update is an entry to a recurring element. A stop puts an end date on a recurring entry of another element, to prevent it being processed in the run.
- *Messages.* For example, you can write a formula that checks the length of a text string, and have it issue a message for payroll users if the string is too short or too long.

You set up *formula result rules* to determine the type of each result, and the names and input values of any other elements the result may affect.

Formulas Included in Oracle Payroll Startup Data

Oracle Payroll comes with formulas specific to your legislation. Generally, you receive all the calculations required for employee tax withholding and employer taxes. When there are changes to taxes, you receive updates. You may also receive formulas for other earnings and deductions, depending on your legislation.

Pay Values

When you have occasion to look at the structure of an element online, you may see an input value named *Pay Value* at the top of its input value listing.

The Pay Value is different from other input values. Its purpose is to store an element's *run result*. For example, suppose the formula for the Wages element is:

```
Wages = Hours Worked x Wage Rate
```

If an employee whose wage rate is $10/hour works 40 hours in a week, the payroll run produces a run result of $400 for him or her. It stores this result in the element's Pay Value.

However, if you give an entry to a Pay Value before a run, this entry becomes the element's run result. For example, suppose you enter 40 in the Time Worked input value of the Wages element for an employee who earns $10/hour, but also enter $100 in the element's Pay Value. The run ignores the entry of hours worked and the Wages formula, and simply produces a run result of $100 for this employee.

Enterable and Non–Enterable Pay Values

Pay Values sometimes appear as the first input value for elements having the rule Process in Run, providing a place to store run results. For some elements with the Process in Run rule the Pay Value may be enterable, so you can put in it a run result amount when the element has no formula, or when you do not want its formula to process.

However for generated elements, the Pay Value is usually not enterable. This is because Oracle Payroll provides other ways for you to supply run result amounts for these elements when formulas are unnecessary, or when you need to add to, subtract from or replace calculated run results.

Element Classifications and Processing Sequence

Elements are grouped into primary classifications, such as Earnings and Voluntary Deductions. In a human resources department, you can use the primary classifications to identify groups of elements for information and analysis purposes. In a payroll department, the classifications control processing, including the sequence in which elements are processed and the balances they feed.

Oracle HRMS provides you with these primary classifications and some balances, mainly to reflect tax legislation. They are designed to meet the legislative requirements of your country, so you cannot change them. You can create additional balances to be fed by any of the primary classifications.

Processing Sequence in the Payroll Run

An element's primary classification provides a default processing priority for the element in payroll runs. Lower priority numbers process first.

Most classifications also have a priority range. When you define an element in these classifications, you can overwrite its default processing priority with another number from the range. This is useful if you need to establish the order in which the element processes with respect to other elements in the classification.

Sometimes you must prioritize the processing of certain element entries for an individual employee. For example, you may need to determine the precise order in which deductions taken for wage attachments process for an employee. You can enter a subpriority number for element entries in the Entry Values window.

Secondary Classifications

You can define secondary classifications to feed your own user defined balances. These secondary classifications are subsets of the primary classifications. In some legislations, secondary classifications have been predefined. As with primary classifications, you cannot remove or change any predefined secondary classifications, and you cannot disable any of the predefined balance feeds created for them.

> **Note:** Secondary classifications are not used in the US version of Oracle Payroll at this time.

Categories – for US Classifications

Most US classifications are subdivided into several categories. Categories further define an element's purpose, and can help to determine applicable processing or tax rules. You can define additional categories.

Survey of the Classifications

This topic contains the following information:

- The processing priority range and default priority for each classification.
- The predefined categories for each classification. You can add more categories, which are defined as Lookups.
- A description of the function of elements within each classification and category.

Classification	Priority	Default
Information	0 – 500	250
Non–payroll	501 – 1000	750
PTO Accruals	1001 – 1500	1250
Earnings	1501 – 2000	1750
Supplemental Earnings	2001 – 3000	2500
Imputed Earnings	3001 – 3500	3250
Pre–Tax Deductions	3501 – 4000	3750
Tax Deductions	(no range)	4250
Employer Taxes	(no range)	4250
Tax Credits	(no range)	4250
Involuntary Deductions	5001 – 5500	5250
Voluntary Deductions	5501 – 6000	5750
Employer Liabilities	6001 – 7000	6500

Table 1 – 1 **Table of Classification Priorities**

Classification	Categories
Earnings	Regular
	Overtime
	Shift Pay
Supplemental Earnings	Dismissal Payments

Classification	Categories
	Educational Assistance
	Deferred Compensation Plans
	Jury Duty Pay
	Moving Expense Reimbursement
	Pensions/Annuities
	Awards and Prizes
	Bonuses
	Commissions
	Cafeteria Plans
	Deceased Employee Wages
	Sick Pay
	Travel Expense Reimbursement
	Vacation Pay
Imputed Earnings	Group Term Life Insurance
	Personal Use of Company Car
	Non–cash Awards
PTO Accruals	Vacation
	Sick
Voluntary Deductions	
Involuntary Deductions	Garnishments
	Bankruptcy Order
	Federal Tax Levy
	State Tax Levy
	Local Tax Levy
	Child Support Order
	Spousal Support Order
	Alimony
	School Loan

Classification	Categories
	Credit Debt
	Employee–Requested Payment
Pre–Tax Deductions	Deferred Comp 401k
	Health Care 125
	Dependent Care 125
Tax Deductions	Federal
	State
	Local
Employer Taxes	Federal
	State
	Local
Employer Liabilities	Benefits
	Overhead
Tax Credit	
Non–Payroll Payments	Expense Reimbursement
Information	Absence Hours
	Straight–Time Overtime Hours
	Tax Balance
	Labor Hours
	Regular Hours

Table 1 – 2 Table of Element Classification and Categories

Earnings, Supplemental Earnings, Imputed Earnings

There are three classifications of earnings types: Earnings, Supplemental Earnings and Imputed Earnings.

Earnings classification elements represent earnings for time worked, as for example salary and hourly wages. The Supplemental Earnings classification includes a variety of special earnings paid in addition to earnings for time worked, as for example bonuses or sick pay.

Elements in the classification Imputed Earnings are for non–cash remuneration such as personal use of a company–provided car, or company–paid premiums for group term life insurance.

Paid Time Off (PTO) Accruals

Elements the system generates to represent plans for accrual of PTO for vacation or sick leave have the classification PTO Accruals, and the category of either Vacation or Sick. You use these elements to enroll employees in the accrual plans. The system also generates elements (with the classification Information) to hold accrued time that employees can carry over to the new year, and accrued time they cannot carry over.

See: Defining a PTO Accrual Plan: page 5 – 38

For entry of amounts of accrued time employees take for vacation or sick leave, you define for each accrual plan an absence element with the classification Information.

See: Defining and Linking an Absence Element: page 5 – 34

Pre–Tax and After Tax Deductions

Elements for deductions taken before taxes, as for example deductions for 401(k) plans or for health care or dependent care reimbursement, fall into the classification Pre–Tax Deductions.

Other non–tax deduction elements fall into one of two classifications, either Voluntary Deductions or Involuntary Deductions. Loan repayments, credit union deductions, insurance premiums and charitable contributions are examples of voluntary deductions. Deductions for court–ordered wage attachments, as for example for tax levies, child or spousal support, or bankruptcy orders, fall into the classification Involuntary Deductions.

Non–Payroll Payments

Elements in this classification produce payments made to employees through the payroll system that are not true earnings. For example, the

Expense Reimbursement category of this classification covers non–taxable expense reimbursements.

Because payments in this classification are not earnings, they are never subject to taxes and never feed balances of taxable pay. Payments resulting from the processing of Non–Payroll Payments elements always appear separately from earnings in reports and balance totals.

Tax Deductions, Tax Credits, Employer Taxes

Deductions for employee tax withholding fall into the classification Tax Deductions. Oracle Payroll includes elements representing deductions for the following federal taxes:

- Federal Income Tax (FIT)
- Federal Unemployment Tax Act taxes (FUTA)
- Social Security (FICA–OASDI)
- Medicare (FICA–HI)

At the state level, Oracle Payroll includes elements representing deductions for:

- State Income Tax (SIT)
- State Unemployment Insurance (SUI)
- State Disability Insurance (SDI)
- Workers Compensation (WC).

At the local level, Oracle Payroll includes elements for:

- city tax
- county tax
- school district tax
- head tax.

Tax credits you pay to employees belong in the Tax Credits classification. These are, for example, payments of credits due in accordance with the Earned Income Credit (EIC) plan.

For employer payments for Social Security and Medicare, and for Workers Compensation, SUI and SDI, Oracle Payroll uses elements in the classification Employer Taxes.

Oracle Payroll comes with all the necessary elements and calculations for tax deductions, tax credits and employer taxes already in place. As tax information changes, you receive the necessary updates. Oracle has concluded an agreement with Vertex Inc. making Vertex the supplier of all tax calculations and updates for Oracle Payroll.

See: Tax Balances, Running Your Payroll Using Oracle HRMS

Employer–paid Benefits and Employer Overhead

Elements producing non–tax payments employers make on behalf of their employees belong in the classification Employer Liabilities. The category Benefits within this classification covers employer payments toward employee benefits such as health insurance or pension plans.

The category Overhead covers charges employers incur for employees apart from benefits payments. For example, an element in this classification can represent the cost of required employee safety equipment.

Information Elements

Many elements may not belong in any of the classifications described above, but nonetheless hold many different types of information you need. These elements belong in the classification Information.

This classification is especially useful for elements that do not process in Oracle Payroll. Such elements might, for example, hold information about tangible items issued to employees, such as cellular phones, identification badges or company cars. Sites that do not include Oracle Payroll use elements in this classification to hold information about employee compensation and benefits.

See: Defining an Element to Hold Information: page 1 – 40

Absence Category

Elements in the Absence Hours category of the Information classification hold hours of time that employees are absent from work.

Straight–time Overtime Hours Category

Elements in the Straight Time Portion of Overtime Pay category hold amounts of straight time pay needed in some states for the calculation of Workers Compensation premiums.

Tax Balance Figures

Elements in this category hold figures resulting from tax calculations. Oracle Payroll uses these figures to feed various tax balances that appear in inquiry windows and on reports.

See: Viewing Tax Balances, Running Your Payroll Using Oracle HRMS

Labor Hours and Regular Hours Categories

The category Labor Hours exists for the predefined element Labor Recording, used to receive entries of salaried employees' hours worked on a project, when you require this information for transfer to a project accounting or labor distribution system.

The category Regular Hours exists for the predefined element Regular Hours Worked, which receives information on employees' hours worked during the payroll run, for use in reports.

See: The Earnings Types Regular Salary and Regular Wages: page 6 – 4

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 US 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 the US, 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.
- 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 US version 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 US 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.

Compensation Policy Changes

It is inevitable that your business rules for compensation and benefits will change over time. You can create new elements and disable existing ones at any time. You can also make certain changes to existing elements and links, as outlined below.

Element definitions, link definitions, and element entries are all datetracked. This lets you track the changes to your compensation and benefit policies without losing any of your historical employee information. The history of your definitions remains in place for validation and reporting, and for future calculations of back pay.

Maintaining Elements

After you have defined and used an element, you can make the following changes:

- Change a required input value to be not required.
- Alter the sequence in which input values appear in the Element Entries window.
- Change the input value validation rules for minimum, maximum, lookup, or formula.
- Change your specification of which input values create Database Items. Note, however, you cannot remove Database Items if they are used in any formulas or QuickPaint reports.

You cannot remove existing input values or add new ones if you have created any entries for the element.

Maintaining Links

Link rules always control the entry of element values at the time of entry. Changes to link rules affect existing entries in different ways, depending on your use of standard links and hot defaults. After you have used an element you can make the following changes to the link rules:

- Change the input value defaults and validation.

  These changes affect all new entries. Changes to hot defaults affect existing entries. The system also uses the new validation rules to check any updates you make to existing entries.
- Date–effectively end all of the rules that apply to an element and define a new set of rules, which are effective from a later date. For example, suppose you have defined eligibility for a company

car based on grade. Following a change of policy you must now define eligibility based on job.

  – You will not be allowed to end the link if any nonrecurring entries exist at the date you want to end the rule. You must delete existing entries before you end the link.

  – You can end the link if recurring entries exist. Any existing entries will be ended automatically when you end the link.

- Change the qualifying conditions of age and length of service that employees must meet to be eligible for the element.

Policy Development

With DateTrack you can also make future–dated changes to your information safe in the knowledge that these changes will not become effective in the system until the correct date.

In this way you can use your compensation and benefit information to plan changes ahead of time; analyze the impact of these changes; adjust these changes and generally smooth out the workload that is often associated with major changes in compensation and benefits policy.

Setting Up Compensation and Benefits

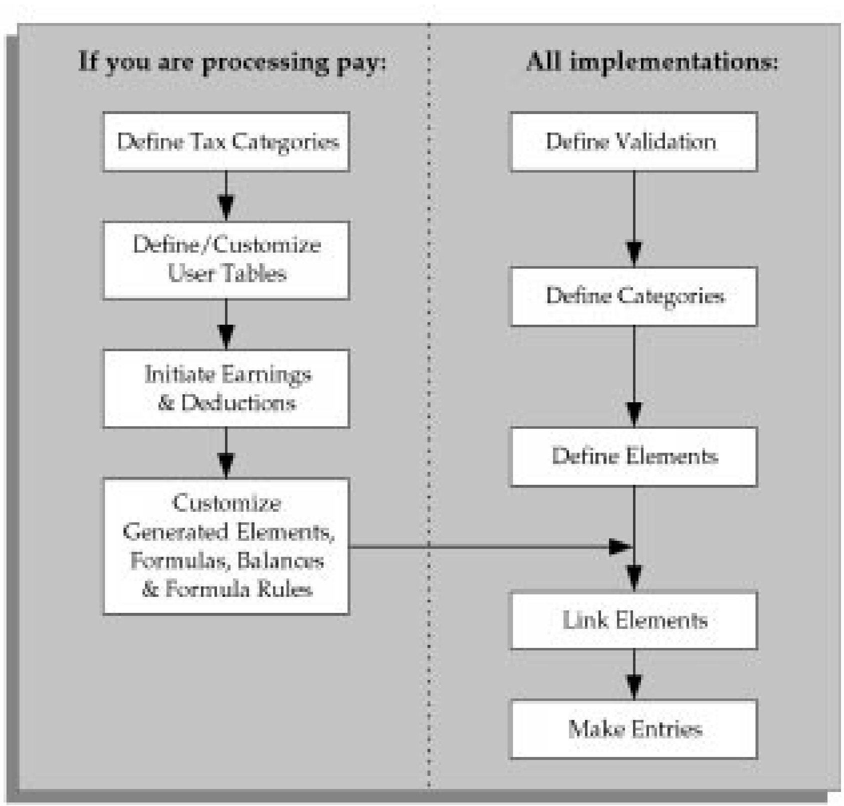
Follow this process to set up earnings, deductions, and other items in the compensation package you offer to employees. There are additional steps for setting up the following types of compensation and benefits:

- Salaries for Salary Administration; see: Salary Administration: page 4 – 13
- Absence elements and PTO accrual plans

  See: Setting Up Absence Management: page 5 – 31.

  See: Setting Up PTO Accrual Plans: page 5 – 36.
- Benefits; see: Total Compensation, Activity Rates: page 13 – 2

Figure 1 – 2 Compensation and Benefits Setup



Define Validation and Lookups

Define validation for entries of any new elements you are creating.

1. To restrict compensation entries to a list of valid values, define a new Lookup Type and add Lookup Values for this new lookup.

   See: Adding Lookup Types and Values, *Customizing, Reporting, and System Administration in Oracle HRMS*.

2. To validate compensation entries using formulas, write a formula of type Element Input Validation.

   See: Writing Formulas for Validation, *Using Oracle FastFormula*.

3. To create a matrix of values (such as bonus amount against years of service) for use in formulas or QuickPaint reports, set up user tables.

   See: Setting Up User Tables, Columns, and Rows, *Customizing, Reporting, and System Administration in Oracle HRMS*.

Define Element Skip Rules

If some elements should not be processed in every payroll run, write formulas for element skip rules defining the conditions when the run should process these elements.

See: Writing Formulas for Element Skip Rules, *Using Oracle FastFormula*.

Define Elements

1. Define elements and element input values:

   - To record information about employee compensation, benefits, and equipment
   - For processing earnings and deductions. (Note that some elements for legislative deductions are predefined.)

   See: Defining an Element: page 1 – 40.

   See: Defining an Element's Input Values: page 1 – 45.

2. Define frequency rules, if necessary, to determine the periods in which the element should be processed.

   See: Defining Frequency Rules: page 1 – 47.

See also: Deleting an Element: page 1 – 48.

Define Links for Predefined and User–defined Elements

1. If the payroll costs of an element should be distributed over other elements, define a distribution set.

See: Defining an Element or Distribution Set, *Customizing, Reporting, and System Administration in Oracle HRMS*.

2. Define element links to identify one or more groups of employees who are eligible to receive an element.

   See: Defining Element Links: page 1 – 42.

See also: Running the Element Link Details Report: page 1 – 61.

Define Balances

Oracle Payroll has many predefined balances installed with the system. You can define other balances.

1. Define secondary element classifications.

   See: Defining Secondary Element Classifications: page 1 – 49.

2. Create classes of balance feeds by entering or removing secondary classifications for your elements.

   See: Creating Classes of Balance Feeds: page 1 – 51.

3. Define user balances and create balance feeds for individual elements.

   See: Defining User Balances: page 1 – 52.

   See: Creating Balance Feeds for Individual Elements: page 1 – 50.

4. Modify elements generated by Oracle Payroll when you initiate earnings and deductions.

   See: Modifying Processing Rules of Generated Elements: page 1 – 62

   See: Modifying Further Information of a Generated Element: page 1 – 65

Write Payroll Formulas

Oracle Payroll provides formulas for processing legislative deductions. For other elements, you can write formulas to calculate element results and other processing outcomes in payroll runs.

See: Writing Payroll Formulas for Elements, *Using Oracle FastFormula*.

Define Formula Processing and Result Rules

To define which formula processes an element for Active assignments (and optionally for other assignment statuses), define processing rules for the element. To specify what happens to formula results (that is, the values you include in the formula's Return statement), define formula result rules.

See: Defining Formula Processing and Result Rules: page 1 – 54.

Make Entries

For elements without Standard links, make entries of your elements for all employee who should receive them.

See: Making Manual Element Entries: page 2 – 22.

Defining an Element to Hold Information

Use the Element window to create an element.

Use the procedure below to define most elements that hold information but *do not process in payroll runs*.

Note: To define information elements for health care benefit plans (elements with the benefit classification Medical, Dental or Vision), or elements for absence types, use different procedures.

Defining Benefit Plan Elements: page 3 – 19

Defining and Linking an Absence Element: page 5 – 34

☞ **Attention:** The version of the Element window you see depends on your HR User Type profile option. With the profile option *HR User*, you see and access only those fields needed to define elements that hold information or represent benefit plans or absence types. With the profile options *Payroll User* and *HR with Payroll User*, you see and access all available fields.

Naming the Element and its Processing Rules

▶ **To identify and classify the element:**

1. Set your effective date early enough to handle any historical element entries you want to make.
2. Enter a unique name, reporting name and description for the element. Start the names with a letter of the alphabet (not a number or symbol). The reporting name is a short name that appears on reports, and on the statement of earnings if the element processes in the payroll run.
3. Select Information as the primary classification for the element. Also select a benefits classification if this element represents a benefit.

▶ **To enter processing information:**

1. Select Recurring as the processing type, so that entries to this element's input values will remain in effect until you end them. If you select Nonrecurring, entries to the element are effective only for the pay period in which you make them.
2. Select Actual Termination as the termination rule.
3. For the element to receive more than one entry at the same time, check the Multiple Entries Allowed box.

Note: The rule Additional Entry Allowed is not applicable for US installations. It is available for use at non–US sites.

4. If at some time you need to prevent the element from accepting any new entries, either temporarily or permanently, check the Closed for Entry box. This does not affect any existing element entries.

☞ **Attention:** Use this feature with caution. When you perform certain important tasks in Oracle HRMS, the system may automatically create or delete element entries. These tasks include hiring and terminating people, and updating assignments. Therefore, if you check Closed for Entry on an element, this might prevent users terminating employees and updating assignments. If there are standard links for the element, it will also prevent users hiring people who are eligible for the element.

▶ To establish currencies and qualifying conditions:

1. The Input and Output Currencies appear as USD (US dollars) and you cannot change these defaults.
2. If there is a minimum age for employees to receive the element, enter it in the Age field.
3. If employees must complete a minimum length of service before receiving the element, enter a number in the Length of Service field and select a unit of measure (such as months or years) in the Units field.
4. For the system to automatically enter the element and its default values for all eligible employees, check the Standard box.
5. Save the element definition.

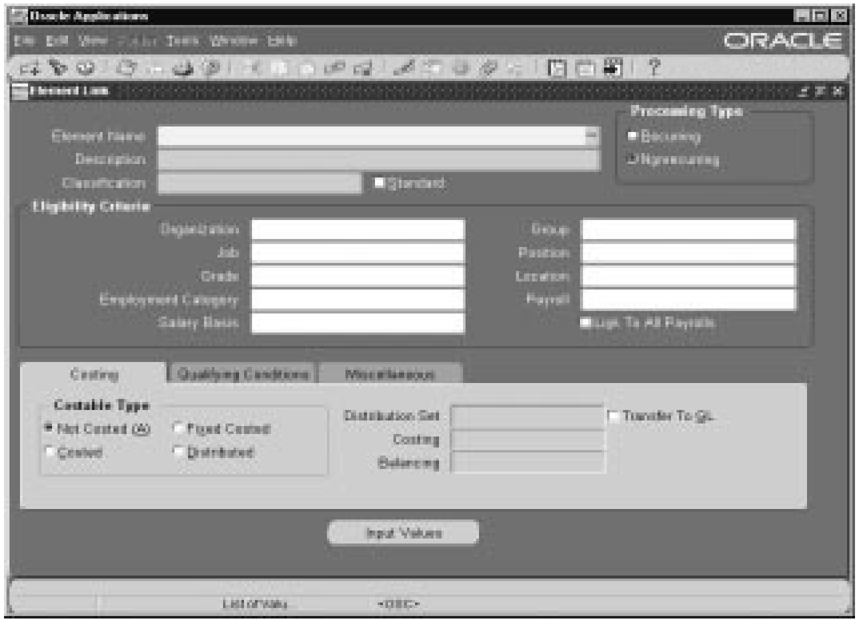
▶ To enter a category and benefits carrier

1. Click in the Further Information field to open the Further Element Information window. In the Category field, select a category.
2. For an element representing a benefit, select the name of the carrier in the Benefits Carrier field.
3. Save these entries. You can now choose the Input Values button to set up the element's input values.

   See: Defining an Element's Input Values: page 1 – 45

Defining Element Links

Use the Element Link window to define groups of assignments that are eligible for an element.



Note: When you define a link for a benefit, do not select any eligibility criteria. Instead use participation eligibility profiles to restrict eligibility for the benefit.

▶ To define an element link:

1. Set your effective date to the date you want the eligibility criteria to come into effect.
2. In the Element Name field, select the Element for which you are defining a link.
3. Check the Standard check box if you want all employees who are made eligible by the link to receive the element automatically.

   You can only create a standard link if the element is recurring and multiple entries are *not* allowed by the element definition.
4. In the Eligibility Criteria region, select the assignment components that constitute this eligibility rule. If you want to link to all employees, do not enter any eligibility criteria.

   You can link to all payrolls or to a specific payroll. Do one of the following:

- Leave the Payroll field blank and check the Link to all Payrolls check box if you want employees assigned to *any* payroll to be eligible. This rule excludes employees who are not assigned to a payroll.
- Select the name of a specific payroll if you want only employees on that payroll to be eligible for the element. Do not check the Link to all Payrolls check box.
- Leave both fields blank if assignment to a payroll is irrelevant to eligibility for the element.

Costing

▶ **To enter costing information for the link:**

1. Select the Costable Type. The default is *Not Costed*, meaning that the system maintains no costing information for the element.

   - To allow entry of costing information at all levels, including the assignment and element entry levels, select *Costed*. This is the appropriate selection for most elements representing earnings types.
   - If you want all entries of the element to be allocated to the same account, select *Fixed Costed*.
   - If you want to distribute overhead costs (such as employer contributions to a pension plan) over other elements, select *Distributed*. Then select a Distribution Set.

   Note: Some element classifications for your legislation may be predefined as Not Costed and you cannot override this.

2. Check the Transfer to GL check box if the payroll run results from this link should be transferred to the general ledger.

3. Use the Costing field to select a GL account code and, if present, account codes of labor distribution or other systems in which to collect the run results of this element. Then use the Balancing field to select the GL account that balances this one.

   For deductions elements:

   - Select the code for the GL account to credit in the Costing field, and the code for the account to debit in the Balancing field.

   For elements in all other classifications:

   - Select the code for the GL account code to debit in the Costing field, and the code for the account to credit in the Balancing field.

Note: Depending on your set up of the Cost Allocation flexfield, the Balancing field may not be enabled.

Qualifying Conditions

▶ **To enter qualifying conditions for the link:**

■ Go to the Qualifying Conditions region. Here you can add or change age or length of service requirements for this particular eligibility rule.

The system checks these conditions when you make an entry of the element. If the employee does not meet the qualifying conditions, you receive a warning.

Input Values

▶ **To adjust input values for the link:**

■ Save your link definition and choose the Input Values button to display the Link Input Values window.

Use this window to:

- Enter a new default or change one entered at the element level
- Check the Costed box to maintain costing information for an input value.
- Change the maximum, minimum or both for an input value. Logically, the new values should be within the range you defined for the element as a whole. However the system does not enforce this.

Defining an Element's Input Values

Use the Input Values window to define the input values for the element. You can define up to 15 input values for an element.

Payroll users: If you are creating balance feeds for individual elements, ensure you define an input value of the same unit of measure as the balance. Money units must be the same currency.

▶ **To define input values:**

1. Set your effective date early enough to handle any historical element entries you want to make.
2. Enter or query the element in the Element window and choose the Input Values button.
3. Enter the name of the first input value. Remember that if you want to define a *pay value* to hold run results, you must name it Pay Value.
4. Select the unit type of your input value (money, hours, character, date, number, or time). A Pay Value must have the unit type Money if the element is in a Payments type classification.
5. You can enter numbers in the Sequence field to change the order in which the input values appear in the Entry Values window.
6. Check the Required check box if all entries of the element must have a value for this input.
7. Check the User Enterable check box if users can enter a value for this input. Uncheck it if you want to ensure that the default value is entered for all employees.
8. Check the Database Item check box if you want the value to be available to formulas or QuickPaint inquiries.

   Database Items are simple identifiers that the system uses to find specific items of information in the human resources database.

Entering Element–Level Defaults

▶ **To enter a default for an input value:**

1. Enter the value in the Default field.
2. If you want existing entries to be updated whenever the default is changed, check the Hot Default check box. The input value must be required if you want to use this option.

A hot default appears in the Entry Values window in quotation marks.

Warning: If a user overrides a hot default in the Entry Values window, subsequent changes to the default will *not* affect the entry. For this reason, you may prefer to use BEE to change defaults for large groups of employees, rather than the hot default feature.

Defining Entry Validation

▶ **To enter validation for an input value:**

1. Do *one* of the following:
   - Enter maximum and minimum values for the input.
   - Select a Lookup Type to act as a lookup supplying a list of valid values.
   - Select a formula to validate entries for this input value. Formulas can return messages to users about the success or failure of the validation.
2. Select Warning or Error to determine whether the system warns users that an entry is invalid or prevents them from saving an invalid entry. You cannot select a value if you chose a Lookup because a user cannot enter an invalid value for an input value validated by lookup.

Defining Frequency Rules

Recurring elements may require frequency rules to determine in which pay periods they should process. For example, a monthly deduction might be processed in the third period of the month for weekly–paid employees and in the second period of the month for employees paid on a semi–monthly basis.

It is possible to set frequency rules to process once– or twice–yearly deductions on monthly, quarterly, or semi–annual payrolls. These rules' periods then refer to periods within a year (months, quarters or half years) instead or periods within a month. However, for infrequent deductions, you may prefer to define them as nonrecurring and use BEE to make entries when required.

Use the Frequency Rules window to define or change an element's frequency rules at any time.

North American Payroll users: use the Deduction form to define or change a deduction's frequency rules.

▶ **To define frequency rules:**

1. Select the name of the payroll for which you want to define frequency rules.
2. Check the boxes for the processing period or periods in which you want the element to process for each payroll.

   For example, if you want a monthly deduction to process in the second week of the month for a weekly payroll, check the box under 2 for that payroll.

   Notice that some periods are not available for all payrolls. For example, a bi–weekly payroll can only have, at most, three periods a month, so periods 4, 5, and 6 are not relevant to this payroll.

Deleting an Element

Before you delete an element, you must first delete any entries of the element recorded for employees and then any links defined for the element.

Use the following process to delete any elements you defined in the Element window. North American Payroll users can also use this process to delete elements generated by the system when they initiated earnings or deductions.

Warning: Do not delete any predefined elements.

▶ To delete an element:

1. Use the List Employees by Element window to get a list of all employees with entries for the element.
2. For each employee, query the element entry in the Element Entries window, choose Delete Record, and save.
3. Query the element in the Element Link window and, for each link for this element, choose Delete Record, and save.
4. Query the element in the appropriate window (Element or, for North American users, Earnings, or Deductions), choose Delete Record, and save.

   The system prompts you to either End Date the element or Purge it. Select End Date if you want the element to remain in the system but be effective through a certain date. Select Purge if you made a mistake defining the element and you want to delete it from the system altogether.

Defining Secondary Element Classifications

Oracle Payroll users can define secondary classifications to create subsets within primary classifications. You decide which elements, from a primary classification, are in each secondary classification, then you use the secondary classification to feed balances.

Use the Element Classifications window.

▶ **To create secondary element classifications:**

1. Query a primary element classification. The check box indicates whether it is for nonpayment elements. These are elements that do not feed the Payments balance.

   The defined priority and costing details for the classification also display.

   Priority: The processing range displays together with the default priority.

   Costable: If this check box is checked, you can select all costing options on the element link for elements of this classification, including Not Costed.

   Distributable: If this check box is checked, you can create a distribution set from elements of this classification over which you can distribute costs.

   Debit or **Credit**: These option buttons display the cost type for elements in the classification, that is, whether the accounts they feed are to be debited or credited.

2. Enter a unique name for the secondary classification you want to associate with the displayed primary classification. You can also add a description.

3. Select the Default check box if you want all elements in the primary classification to be in the secondary classification by default. Then, if there are any exceptions, you must manually remove these elements from the secondary classification. You can do this at any time using the Balance Feed Control window, which opens from the Element window.

   Note: For some legislations, Oracle Payroll has already defined a number of secondary classifications. Some of these are default classifications, but not all. You cannot delete these classifications, and you cannot delete them from the Balance Feed Control window for predefined elements.

Creating Balance Feeds for Individual Elements

Use the Balance Feeds window to select balances to be fed by the input values of an element. Balances are either fed by whole classifications of elements or by individual elements, but not by both. Therefore, in this window you cannot select balances that are fed by classifications. You can query a balance in the Balance window and choose the Classifications button to view the list of classifications that feed it.

You can use an element to feed as many balances as you require.

▶ **To create balance feeds for one element:**

1. Set your effective date to when you want the balance feed to start.
2. Enter or query the element in the Element window and choose the Balance Feeds button.
3. In the Balance Feeds window, select the input value that you want to feed the balance with.

   The list displays all the input values defined for the element. These input values may have different units of measure. When you select an input value its unit of measure displays in the Units field. To feed a balance with the element's direct run result, select Pay Value.
4. Select the balance you want the input value to feed.

   The list restricts your choice to balances having the same unit of measure as the input value you selected.
5. Select Add or Subtract for the balance feed.

   Note: Secondary classifications and balance feed controls currently do not apply to the US version of Oracle Payroll.

Creating Classes of Balance Feeds

In the Balance Feed Control window, you can classify an element using secondary classifications. These determine the balances that the element feeds. You can query a balance in the Balance window and choose the Classifications button to view the list of classifications that feed it.

▶ **To select or remove secondary element classifications:**

1. Set your effective date to when you want the element to begin feeding the balances that the secondary classifications feed.
2. Enter or query the element in the Element window and choose the Balance Feed Control button.
3. In the Balance Feed Control window, delete any default secondary classifications you do not require for the element.

   When this window opens, it displays any default secondary classifications for the element's primary classification. Unless they are predefined, you can delete any of these classifications, and you can change their effective start dates.
4. Select any non–default secondary classifications you require.

Defining User Balances

Defining a balance includes defining its feeds and dimensions. When you select feeds for the balance you have to choose between specifying element input values directly and selecting element classifications to determine the feeds. You cannot choose both methods together.

You define balances in the Balance window.

▶ To define a user balance:

1. Do *one* of the following:
   - Enter a unique name and a reporting name for the new balance. If you do not provide a reporting name, the first seven characters of the balance name appear on reports.
   - Query any user balances you want to change.
2. Enter the unit of measure for the balance. The choices are days, hours (listed in different formats), integer, money and number. If you select money as the unit you must also select a currency.

   Note: Do not select the Use for Remuneration check box. This displays which predefined balance is the Remuneration balance. Only one balance within a legislation can have this value.
3. Go to the Balance Feeds window *or* to the Balance Classifications window.

In the Balance Feeds window:

- Set your effective date to the start date for the balance feeds.
- Select one or more elements to feed the balance. Only those elements whose input values have the same unit of measure as the balance are listed.

  When you select an element, its classification is displayed. You can select elements with different classifications.
- Select the input value that is to feed the balance.

  For most payroll balances select Pay Value so that the element's run result feeds the balance.
- Select Add or Subtract for the balance feed.

In the Balance Classifications window:

- Select one or more element classifications and select Add or Subtract for each. The run results of all elements in the classification will feed the balance.

The list includes all the primary and secondary element classifications that are valid for this balance. If you select a secondary classification, you cannot also select its parent primary classification.

Note: Secondary classifications are not used in the US version of Oracle Payroll at this time.

4. In the Balance Dimensions window, select the dimensions you require.

   You can remove any dimension previously selected for a user–defined balance. You can also add dimensions to the startup balances included with your system, and later remove these additional dimensions. However, you cannot remove the dimensions that were predefined for the startup balances.

   Note: To hold balances for a fiscal year that is different from the calendar year, you must supply the fiscal year start date for your Business Group.

UK users:

5. In the Initial Balance Feed window you can see details of the element and input value used for the Initial Balance feed. This feed is defined by implementation consultants prior to performing an initial balance upload at implementation time.

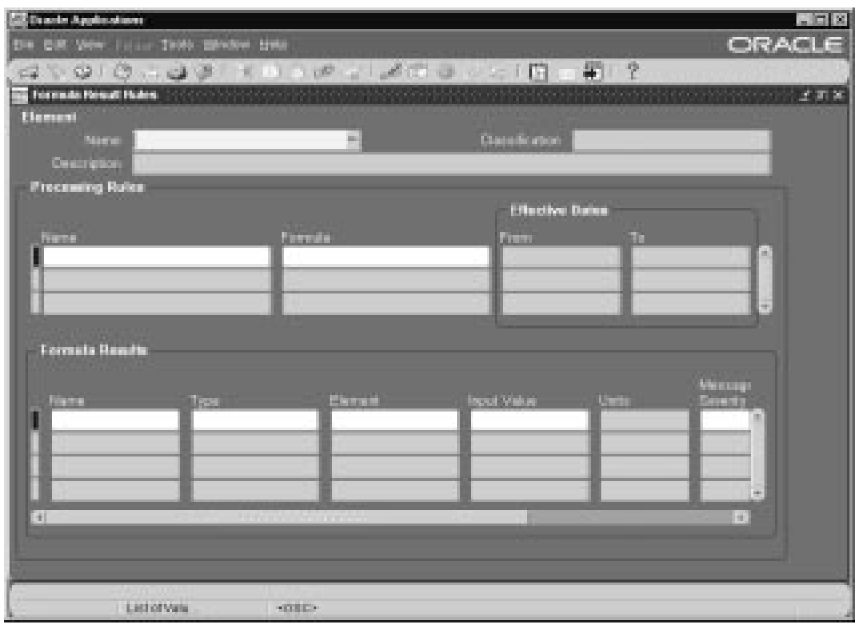
Defining Formula Processing and Result Rules

Use the Formula Result Rules window to associate one or more formula processing rules with an element.

US users: These rules are generated by the system when you initiate an earnings or deduction. If you substitute a modified formula for the one generated for an element, or write additional formulas for the element, you also need to modify or write new processing and result rules.

At minimum, an element needs one standard processing rule. This identifies the formula the payroll run uses to process the element for employees with an Active assignment status (and a Payroll system status of Process). You can define other processing rules if you need to use different formulas for assignments at other statuses. For example, you could have two rules for a Wages element: Standard Wages and Paid Training Leave.

Also use this window to define how each formula result is used by the payroll run.



▶ **To associate processing rules with elements:**

1. Set your effective date to the start date for the processing rule.
2. Select the element for which you are entering rules. The element's description and classification automatically display.

3. In the Processing Rules region, select Standard and the regular formula for the element. If you have other formulas for this element, select them and the assignment statuses you want to associate with them.

   Note: If you select a formula with inputs that do not match the element, you will receive a warning message, but you can still save your rule. Remember to update the formula before running the payroll.

4. Save your entries.

▶ **To define formula result rules for each processing rule:**

1. Click on a processing rule to select it.

2. In the Formula Results region, select a formula result name from the list of results specified when the formula was written.

3. Select the appropriate formula result type. There are five possible types:

   Direct result: This is the element's run result. There can be only one direct result per formula.

   Indirect result: This result passes as an element entry to another nonrecurring element not yet processed. A formula can have any number of indirect results.

   Message: The formula issues messages under certain conditions. For example, a formula can check a loan repayment balance and, if the balance is zero, issue the message "Loan is repaid." You read formula messages using the View Run Messages window.

   Stop: This formula result uses the effective date of the payroll run to put an end date on a recurring entry of this or another element (which must be defined with multiple entries not allowed.)

   Update recurring entry: This result updates recurring entries of this or another element. The receiving element must be defined with multiple entries not allowed unless you are passing a recurring element's entries to itself, that is updating another entry of the same element.

   ☞ **Attention:** If your result type is Update Recurring Entry, then any future dated changes to the entry will be overwritten by the results of the current payroll run.

4. If you select Indirect Result, Stop, or Update Recurring Entry as the formula result type, select the name of the element to which you want to pass the formula result. This element must have a processing priority causing it to process after the element sending the result.

5. If you select Message as the formula result type, select a message severity level. There are three choices:

   Fatal: When a message with this severity results from your formula, the run rolls back all processing for the employee assignment.

   Warning: A message with this level of severity does not affect payroll processing but warns the user of a possible problem.

   Information: A message with this level of severity simply gives information.

Correcting and Updating Processing Rules

When you add a formula result it takes on the effective end date of its processing rule. Any date effective changes you make to existing processing rules can affect formula results as follows:

- **Update:** If you update a processing rule or give it an effective end date, all the rule's currently effective and future–dated formula results automatically get identical end dates.
- **Correction:** If you correct a processing rule, all its currently effective and future–dated formula results remain unchanged.
- **Future delete:** If you delete all future changes scheduled for a processing rule, this also deletes any future changes scheduled for the rule's formula results.

Reviewing Earnings and Deductions Structures

You can review at any time the earnings types, non-payroll payments and deductions you initiate in Oracle Payroll, as well as the earnings and deductions included with the system.

> **Note:** When reviewing earnings or deductions you may find two with the same name, the second however including the words "Special Inputs" (for example, Regular Salary and Regular Salary Special Inputs). The special inputs element exists to provide a convenient way to enter a change to an earnings or deduction before a payroll run.

To review the structures of earnings and deductions, you use these windows:

- Earnings
- Deduction
- Element
- Formula
- Formula Result Rules

▶ To review processing and amount rules:

1. For an earnings or payment, use the Earnings window and query the earnings or payment.

   See: Initiating Earnings and Non-Payroll Payments: page 6 – 26

2. For a deduction, use the Deduction window and query the deduction.

▶ To review input values and balance feeds:

1. Using the Element window, query the earnings, payment or deduction.
2. Choose the Input Values button to review the input values.

   See: Defining an Element's Input Values: page 1 – 45

3. Choose the Balance Feeds button to review the balance feeds.

   See: Creating Balance Feeds for Individual Elements: page 1 – 50

▶ To review formulas and formula result rules:

■ Query the earnings, payment or deduction in the appropriate window: for the formula, use the Formula window; for the formula result rules, use the Formula Result Rules window.

See:

Defining Formula Processing and Result Rules: page 1 – 54

Customizing Generated Elements, Balances, and Formulas

When you initiate the earnings, non–payroll payments and non–tax deductions your enterprise requires, Oracle Payroll generates:

- elements
- balances and balance feeds
- formulas for payroll calculations and element skip rules
- formula processing and result rules

You can modify these generated components to enhance their suitability or efficiency for use at your installation. Some modifications can be made even after processing has occurred, but most should be made before processing the element in a payroll run.

Attention: If a generated element requires changes because of mistaken entries made when initiating the earnings or deduction, it is best to delete the results and re–initiate.

For example, if you select the wrong processing rule or amount rule when initiating an earnings or deduction, simply delete the generated components and begin again.

Summary of Possible Modifications

Modification	Window To Use
Modifying a Generated Element	
Modifying Processing Rules of Generated Elements: page 1 – 62	Element **Attention**: When modifying generated elements, save them as *corrections* (not updates).
Termination Rule	
Closed for Entry	
Process in Run	
Third Party Payment	
Processing Priority	
Skip Rule	
Selecting Foreign Currencies: page 1 – 63 (for entries or run results)	
Entering Qualifying Conditions: page 1 – 63	

Modification	Window To Use
Defining Frequency Rules: page 1 – 47	Frequency Rules
Modifying Further Information of a Generated Element	
Changing FLSA Indicators for Earnings or Supplemental Earnings: page 1 – 65	Further Element Information
Entering Benefits Carriers for Imputed Earnings or Pre–Tax or Voluntary Deductions: page 1 – 65	
Setting Processing Frequencies for Benefit Deductions: page 1 – 66	
Changing Run Types for Deductions: page 1 – 66	
Changing Partial Amount Rules for Deductions: page 1 – 66	
Modifying Element Input Values	Input Values
Defining Input Values: page 1 – 45	
Entering Element–level Defaults: page 1 – 45	
Defining Entry Validation: page 1 – 46	
Creating Balance Feeds: page 1 – 50	Balance Feeds
Defining User Balances: page 1 – 52	Balances
Writing or Editing a Formula, see: Using Oracle FastFormula	Formulas
Writing Formulas for Element Skip Rules, see: Using Oracle FastFormula	Formulas
Defining Formula Processing and Result Rules: page 1 – 54	Formula Result Rules

Summary of Possible Modifications to Generated Components

Running the Element Link Details Report

Use this report to check the eligibility criteria that have been defined for elements within a classification. You can report on links for the following categories:

- All elements within a classification
- Either recurring or nonrecurring elements in the classification
- Just a single element

You can choose to see only standard or non–standard links, and only active or inactive links. Further, you can choose to see links to a particular job, organization, payroll, or all payrolls.

You run reports from the Submit Requests window.

▶ **To run the Element Link Details report:**

1. In the Name field, select Element Link Details Report.
2. Enter the Parameters field to open the Parameters window.
3. Enter the effective date for which you want to see the report.
4. Select the classification of elements you want to report on. Optionally select an element processing type (recurring or nonrecurring) or an individual element to report on.
5. To report only on standard links, select Yes in the Standard Link field. Select No to report only on non–standard links. Leave blank to report on all links.
6. Select a link status to report only on links that are either active or inactive as of the report's effective date.
7. To report on links to payrolls:
   - For links to one payroll only, select No in the All Payrolls field and select the payroll in the Payroll field.
   - For links to all payrolls, select Yes in the All Payrolls field and leave the Payroll field blank.
   - To see links irrespective of their payroll criteria, select No in the All Payrolls field and leave the Payroll field blank.
8. You can also select a job or organization to report on links to these assignment components only.
9. Choose the Submit button.

Modifying Processing Rules of Generated Elements

Oracle Payroll generates elements when you initiate earnings and deductions. Using the Element window, you can modify some of the processing information for these elements.

You *cannot* change the following processing rules:

- Processing type (recurring or nonrecurring)
- Multiple entries allowed
- Indirect results only
- Adjustment nly

Note: The rule Additional Entry Allowed has no applicability for US installations. It is available for use at non–US sites.

▶ **To modify processing information:**

1. In the Element window, query the generated element you are modifying.
2. To control the processing of entries to the element after employee termination, you can select an alternative termination rule.
   - If the termination rule is *Final Close,* entries to the element stay open beyond the actual termination date. This makes it possible to produce the final pay for the terminated employee, and other payments if necessary, after his or her actual termination date. This is the appropriate selection for most elements.
   - If the termination rule is *Actual Termination* and the element's processing type is recurring, entries to the element close down on the employee's termination date. If the element's processing type is nonrecurring, entries close down on the last date of the pay period in which the employee leaves.
3. You can prevent the element from accepting any new entries, either temporarily or permanently, as of a certain date. Set the effective date to the date from which you want to close down the element, and check Closed for Entry. This does not affect any existing entries.

☞ **Attention:** Use the *Closed for Entry* feature with caution. When you perform certain important tasks in Oracle HRMS, the system may automatically create or delete element entries. These tasks include hiring and terminating people, and updating assignments. Therefore, if you check Closed for Entry for an element, this might prevent users terminating employees and updating assignments. If there are standard links for the element, it will also prevent users hiring people who are eligible for the element.

4. You can control an element's availability for processing in runs by checking or unchecking the Process in Run box.
5. To make third party payments from an earnings or deduction element, check the Third Party Payment box.
6. If you want to determine the order in which the element processes within its classification range, you can change the default priority number appearing in the Priority field. The payroll run processes elements with lower priority numbers first.
7. You can select a skip rule for the element in the Skip Rule field.

Selecting Foreign Currencies

Define the balances required to hold amounts of the local currencies if you set up earnings types to produce payments in local currencies (instead of the base currency of the Business Group). The system does not generate these balances.

See: Defining User Balances: page 1 – 52

▶ **To select foreign currencies for element entries or run results:**

1. To make entries for the element in a currency other than the Business Group's base currency, select the currency in the Currency Input field.

   For example, if the element represents a housing allowance of 500 pounds sterling paid monthly to a US employee working in the UK, you select GBP as the input currency.
2. To produce run results in a currency other than the Business Group's base currency, select the currency in the Currency Output field.

Entering Qualifying Conditions

▶ **To set qualifying conditions for receiving element entries:**

1. If there is a minimum age for employees to receive the element, enter it in the Age field.
2. If employees must complete a minimum length of service before receiving the element, enter a number in the Length of Service field and select a unit of measure (such as months or years) in the Units field.
3. To automatically enter the element and its default input values for all eligible employees, check the Standard box.

You cannot check this box for nonrecurring elements, or for those with the rule Multiple Entries Allowed.

Note: The qualifying conditions and Standard check box provide defaults for the element. You can override them for particular groupings of employees when you build links for the element.

See: Defining Element Links: page 1 – 42

Modifying Further Information of a Generated Element

▶ **To add or change further information:**

- In the Element window, query the element you are modifying. Click in the Further Information field (in the lower right–hand corner of the window). This opens the Further Element Information window.

  The fields that appear in this window depend on the primary classification of the element. Use these fields to make the entries described below.

  > **Note:** The names of certain balances that the system can accumulate for an earnings type or deduction appear in fields of the Further Element Information window. Whether a balance actually does accumulate depends on the selections made in the Earnings or Deduction window.
  >
  > For example, the Toward Bond Purchase balance accumulates only for deductions for which you have checked the Series EE Bond box in the Processing region of the Deduction window.

Changing FLSA Indicators for Earnings or Supplemental Earnings

▶ **To change FLSA indicators:**

1. To include the amount of the earnings in the calculation of the FLSA overtime base rate, select Yes in the field Include in OT Base. To exclude the amount of this earnings type, select No.
2. To include the hours worked for this earnings type in the calculation of the FLSA overtime base rate, select Yes in the field FLSA Hours. To exclude the hours worked for this earnings, select No.

   See: Identifying the Earnings or Payment: page 6 – 34

Entering Benefits Carriers for Imputed Earnings or Pre–Tax or Voluntary Deductions

▶ **To enter a benefits carrier:**

- If you have defined an external organization with the classification Benefits Carrier, you can select the carrier name in the field Benefits Carrier.

  See: Creating an Organization, Using Oracle HRMS – The Fundamentals (US)

Setting Processing Frequencies for Benefit Deductions

▶ **To set the processing frequency of a benefit deduction:**

■ Select a processing period in the field Period Type. For example, for a benefit deduction that should be taken once each month, select the period type Calendar Month.

Note: When a benefit deduction does not have the same processing frequency as a payroll, give the deduction a frequency rule for the payroll using the Frequency Rules window.

For example, if a benefit deduction taken monthly should process in the second period of the month for the semi–monthly payroll, check 2 as this deduction's regular processing period for this payroll. You can enter or change deduction frequency rules for payrolls at any time.

See: Setting Frequency Rules for the Deduction: page 7 – 17

Changing Run Types for Pre-Tax, Voluntary or Involuntary Deductions

▶ **To change a deduction's run type:**

■ Change the selection in the Processing Run Type field. The choices are:

- Regular (process only in Regular runs)
- All (process in both Regular and Supplemental runs).

Changing Partial Amount Rules for Pre-Tax, Voluntary or Involuntary Deductions

▶ **To change a deduction's partial amount rule:**

■ Change the selection in the Partial EE Contributions field. The choices are:

- Yes (The payroll run should take partial amounts for the deduction if employee funds are insufficient to take the full amount.)
- No (The run should never take partial amounts for the deduction.)

See: Selecting Arrearage Rules for the Deduction: page 7 – 9

CHAPTER

2

Compensation Entry and Analysis

Compensation Entry and Analysis

Can you enter weekly timecard data?

Yes, using Batch Element Entry, you can enter timecard information for a group of employees, using default values as appropriate. You can validate your entries against system rules and external control totals before uploading it to the database in time for the payroll run.

How does Oracle HRMS help reduce data entry errors?

There are three ways:

- By removing the need to make entries at all, when compensation entries are standard for a group of employees and can be entered automatically.
- By reducing keystrokes when you use Batch Element Entry to enter batches of entries.
- By validating all entries using rules you define at setup time.

Can you make one–time changes to entries?

Yes. Some types of compensation or payment (such as expense reimbursements) need only be entered for the period to which they apply. For others, the regular value can be adjusted if you need a different value for one payroll run.

I'm entering compensation details for analysis but not for payroll processing. How do you reduce data entry work to a minimum?

If the same compensation entry applies to a group of employees, the system can enter it automatically. You need to set up the element with *standard links*. Use Batch Element Entry to start or update other entries in batches.

You can download salary information to a spreadsheet, update it there, and upload the new information to the database.

Can you see a history of all compensation values for an employee over time?

Yes, you can view all changes for one or more types of compensation. For salaries, you can also see new proposed salary changes.

How do you compare compensation for groups of employees?

You can select employees by organization, job, position, or grade and view past and current salaries or new salary proposals. For other types of compensation, you can compare the latest values for all employees in any period of time you choose.

If you use grade rates, you can compare compensation entries for all employees on a certain grade, and also see these values as a percentage of the midpoint defined for the grade.

Compensation Entry and Analysis Overview

To record any form of compensation, benefit, or deduction liability for an employee, you make an element entry. There are several ways to do this:

- You can use BEE (Batch Element Entry) to enter or update a batch of element entries for many employees, using defaults for fast entry. For example, you can use BEE to enter timecard data and to enroll employees in PTO accrual plans.
- You can enter salaries, as proposals or confirmed values, in the Salary Administration window.
- You can enter absences or accrued time taken in the Absence Detail window.
- You can enroll employees in benefit plans and select the appropriate coverage for themselves and their dependents. There are different windows for enrolling in Flex Programs, Non–flex Programs, Savings Plans, and Miscellaneous Plans. Alternatively, employees can set up their own enrollments, using Self Service HR.
- You can make or update individual entries of other compensation elements for an employee using the Element Entries window.

At your enterprise, some elements may be defined with standard links so that eligible employees receive an entry automatically. You do not need to do anything to record these forms of compensation for employees.

BEE (Batch Element Entry)

Using **BEE** is the fast way to enter batches of elements on a regular basis, or when compensation levels or policies change. For example, in each payroll period you can use BEE to:

- **Record timecard data** needed for regular pay processing, such as hours worked, location or shift worked, absences, and costing or labor distribution data
- **Enter special nonrecurring earnings or deductions** to be processed in the period
- **Enter one–time changes** to recurring earnings or deductions

From time to time, you might also use BEE for:

- **Enrollment in PTO Accrual Plans**, perhaps for a group of newly hired employees
- **Changes to salary, bonuses, commissions**, and other types of earnings to maintain information about employee compensation

When you enter absences in a batch, BEE creates absence records as well as element entries.

How To Enter a Batch

Each batch has a header and as many batch lines as you require; a batch line is one element entry for an assignment. Lines within a batch can have different effective dates. There are three ways you can enter batches:

- Enter input values and other data for one element, and run a concurrent process to create identical batch lines for all the assignments in an assignment set.
- Create an element set and make entries for each element in the set, one assignment at a time.
- Select an element and create or update lines for this element using defaults to speed entry, and changing defaults as necessary when working through the batch.

You can use any of these approaches in combination in a batch.

For example, to give an identical bonus to all full time employees in the Finance Division, you could create an assignment set for these employees and run a concurrent process to enter the bonus for the set. Then, to handle part time employees, you could select the bonus element in the Batch Lines window and create a batch line individually for each part time employee, entering a pro rata bonus amount.

Validation of Batch Entries

To validate a batch after saving it, you run the BEE validation process from the Batch Header window. This process checks the header and each line of the batch. For example, it checks that each assignment number exists in the database, and that you have specified values for all required input values.

You can add your own validation procedures to the standard process. For example, you can set up control types, such as record counts, and write a validation procedure to check that the batch matches the control totals you enter for each type. You can also add any business validation you require, for example to check that amounts entered for a bonus do not exceed a maximum, or that an assignment's paid time off entitlement is sufficient to cover time taken.

Attention: The validation process does not invoke any validation formulas defined for an element's input values. These formulas are only called from the Element Entries window.

Transfer to Entries Table

When the batch is ready for transfer to the database, you run the BEE transfer process from the Batch Header window. This process first performs the same checks as the validation process. If it finds no errors, it transfers the element entries from the temporary tables to the Entries table in Oracle HRMS.

You can choose whether the transfer process automatically purges the entries from the temporary tables after transfer. You can also run a separate purge process.

Rollback

After a successful BEE transfer, you can roll back the transfer process if you want to completely remove it, provided you have not purged the batch from the BEE tables. You can choose to roll back the transfer even if some of the entries have been processed.

Batch Statuses

The batch status depends on the status of the batch header, all the batch lines, and any control totals specified for the batch. On the Batch Header window, you can see the following status values:

Valid All of the lines, control totals, and header are valid.

Transferred All of the lines, control totals, and header have been transferred.

Unprocessed At least one line, control total, or the header is unprocessed.

Error At least one line, control total, or the header is in error.

Status Mismatch The combination of statuses in the header, lines, and batch is not consistent. For example, it is inconsistent for some, but not all, of the lines to have the status Transferred.

Note: A status mismatch is not possible if you always use the Batch Header and Batch Lines windows to enter and maintain a batch.

Selecting a Date for Compensation Entries

There are two types of element: recurring and nonrecurring.

Entries for recurring elements remain effective indefinitely, until you update them or the employee ceases to be eligible for the element, for example after a change of work assignment. You can start entries of a recurring element at any point in time. Use DateTrack to set the effective start date of new entry or update. This maintains a complete history of values and the dates they changed.

Entries for nonrecurring elements are one–time entries. They are effective only for the current pay period (defined by the payroll to which an employee is assigned). To make the entry, you set your effective date to *any* date in the appropriate pay period. Any changes you make to nonrecurring entries are always corrections. There can be no history of changes to these entries within a pay period. However, the entries for each period (if any) are stored as history for an employee.

Making Batch Element Entries Using BEE

To make batch element entries using BEE, this is the overall procedure:

1. If you want to use a concurrent process to create an identical batch line for several assignments, create an assignment set.

   See: Creating an Assignment Set, *Customizing, Reporting and System Administration in Oracle HRMS*.

2. If you want to create several batch lines for each assignment, create one or more customization element sets.

   See: Defining an Element or Distribution Set, *Customizing, Reporting and System Administration in Oracle HRMS*.

3. Identify the batch, supply any external totals against which to balance it, and determine what should happen if any of the batch lines duplicate existing element entries.

   See: Entering a Batch Header: page 2 – 11

4. Enter the batch.

   If you are using an assignment set, you enter details for one element and run a concurrent process to create identical batch lines for each assignment.

   See: Creating the Same Line for Several Assignments: page 2 – 13

   Then, if necessary, you can edit these line by line, using defaults to help you enter missing information.

   See: Creating or Editing Individual Batch Lines: page 2 – 15

   If you are using element sets, you select an assignment and element set, enter a line for each element in the set, select another assignment, repeat the process, and so on.

   See: Creating Several Lines for One Assignment: page 2 – 14

5. Validate the batch.

   See: Validating a BEE Batch: page 2 – 17

6. Review the results, correct any lines with a status of Error, then validate again.

   See: Reviewing BEE Process Results: page 2 – 18

7. Transfer the batch to the HRMS Entries table.

   See: Transferring a BEE Batch: page 2 – 19

8. Purge the batch from the BEE tables if this was not done automatically on transfer.

See: Purging a Batch From the BEE Tables: page 2 – 20

If you have transferred a batch, but not purged it, you can roll back the transfer if you want to remove it completely from the HRMS Entries table. See: Rolling Back a BEE Process: page 2 – 21

Entering a Batch Header

You can enter batches of element entries in the Batch Header and Batch Lines windows. The header identifies the batch and determines what happens if any of the batch lines duplicate existing element entries.

▶ **To enter a batch header and control totals:**

1. Set your effective date to the date when you want the entries to take effect.
2. Enter a name for the batch, and enter a reference number and the source of the batch, if you require these for your own reference.
3. Select what action the process should take if one of the batch lines matches an existing element entry for an assignment at the effective date.
   - Create New Entry – The process creates a new entry if multiple entries of the element are allowed by the element definition. If multiple entries are not allowed, the process sets the status of the batch line to Error.
   - Reject Entry – The process sets the status of the batch line to Error.
   - Change Existing Entry – The process corrects or updates the existing entry. If there is more than one existing entry, the process sets the status of the batch line to Error.

   The Undefined option is display–only (for batches created using SQL*Plus or a similar tool).
4. If you selected Change Existing Entry, select the type of date effective change to be made to recurring entries:
   - Update – The process changes the existing entry from the effective date, but preserves the previous information. If there are future–dated changes to the existing entry, the process inserts the change before the next scheduled change.
   - Correct – The process corrects the existing entry from its start date through to its end date. Any future–dated changes are unaffected.
   - Override – The process changes the existing entry from the effective date, but preserves the previous information. If there are future–dated changes to the existing entry, the process replaces all future–dated changes with the batch line.

     Notice that if you select this option, you cannot check the Reject if Future Changes check box.

The Undefined option is display–only (for batches created using SQL*Plus or a similar tool).

5. If you want to reject batch lines that match entries that start in the future or for which future changes are scheduled, check the Reject if Future Changes check box.

   Notice that if you check this box, you cannot select the Override option.

6. If you want the batch to be purged from the temporary tables after successful transfer to Oracle HRMS, check the Purge After Transfer check box.

   Attention: You cannot roll back a batch transfer if you have purged the batch from the BEE tables.

7. If you are going to use the Assignment Lines window and you want the system to display automatically any existing lines in this batch for an assignment and element set you select, check the AutoQuery box.

8. If you use control totals to validate the batch before transfer, choose the Totals button. Select a batch control type and enter the total for the batch. You can enter as many types and totals as you require.

   Note: You set up control types as values for the Lookup Type BATCH_CONTROL_TYPES.

Creating the Same Line for Several Assignments

Use the Create Batch Lines window to create identical lines for all assignments identified by an assignment set. This is a quick way to create many lines for an element. If the input values need to vary between assignments, you can leave these blank and add them later using the Batch Lines window.

▶ **To enter batch lines for an assignment set:**

1. Enter or query a batch header in the Batch Header window, and choose the Assignment Set button.
2. In the Create Batch Lines window, select the assignment set and payroll that identify the employees you want to create lines for.
3. Select the element for the batch lines and enter input values as appropriate.
4. If you selected an absence element, enter the absence start and end dates. BEE uses these dates to create an absence record.
5. Change the effective date if required.
6. Choose the Process button to submit a concurrent process called Create Batches. Confirm that you want the system to create the lines.

   The Create Batch Lines window now closes, taking you back to the Batch Header window.
7. Choose the Assignment Set button again if you want to add lines for another element. Requery your batch and choose the Element Lines button if you want to view and edit the lines created by the process.

Creating Several Lines for One Assignment

Use the Batch Assignment Entry window for fast entry of several batch lines for one assignment. You can make one or more entries for each element in an element set.

▶ **To enter lines for one assignment:**

1. Enter or query the batch header in the Batch Header window and choose the Assignment Lines button.
2. Select an assignment and element set.
3. Enter the input values for the first four elements in the set. Lists of values are available on some fields, but no validation is enforced during data entry.

   You can override the effective date for any line. This is the effective start date for a new entry or the effective date of an update.
4. For absence elements, enter the absence start and end dates. BEE uses these dates to create an absence record.
5. If there are more elements in the set, click on the next tab to display them. Continue entering input values.
6. When you have made entries to as many elements as you require from the set, save your work.
7. If you want to make entries for another assignment, select the assignment, enter the lines, then save again.

   Note: The entry values from the previous assignment are not cleared automatically from the form. So you can use the same values without retyping, you can type over the existing values, or you can use the Down Arrow key to clear the record.

Creating or Editing Individual Batch Lines

In the Batch Lines window, you can enter new lines for individual assignments, and you can view and edit lines created automatically for an assignment set. You can speed up entry of new lines by entering default input values

> **Note:** A batch can contain lines for as many elements as you require. Lines within a batch can have different effective dates.

▶ **To enter individual batch lines:**

1. Enter or query a batch header in the Batch Header window, and choose the Element Lines button.
2. Select the element for which you want to make entries.
3. To enter default values to speed up the data entry, choose the Defaults button. The Defaults window displays the input values for the selected element.
4. Enter default values in any of the fields in the Defaults window. These defaults apply to all new entries in the batch, but not to any entries you have already made. You can change the defaults at any time during your data entry.
5. Uncheck the Display check box for any field that you do not want to display in the Lines window. You can hide any fields for which the default is correct for every entry.
6. In the Lines window, enter the data required for the batch. Lists of values are available on some fields, but no validation is enforced during data entry.

   You can override the Effective Date for any line. This is the effective start date for a new entry or the effective date of an update.
7. If you selected an absence element, enter the absence start and end dates. BEE uses these dates to create an absence record.
8. Save your entries. If you want to make entries for another element, select the element, enter new defaults, enter the lines, then save again.

Retrieving Existing Batch Lines

Use the Batch Lines window to view existing batch lines.

▶ **To retrieve existing batch lines:**

1. Do one of the following:

- Select the element in the Element field.
- Check the Unknown Elements check box if you are querying batch lines entered for an invalid element (or no element) by SQL*Plus or another tool.

2. Choose the Find button.

Updating a Batch

You can update a batch at any time before you transfer it. If you make any changes to a batch with the status Validated or Error, the batch status changes to Unprocessed.

Validating a BEE Batch

The validation process tests each batch line against certain predefined rules about element entries, and also against your own rules if you have created additional validation procedures.

▶ **To validate a batch:**

1. Query the batch in the Batch Header window, and choose the Process button.
2. Select Validate, and choose Start. The system displays the concurrent request ID so that you can query it on the Requests window.
3. When the concurrent request is completed, query the batch in the Batch Header window. If you have several batches to review, query them in the Batch Summary window.

   See: Reviewing BEE Process Results: page 2 – 18.

Reviewing BEE Process Results

To review the results of a batch process, use the Batch Summary window.

▶ **To review batch process results:**

1. Query one or more batches by name, reference, or status in the Batch Summary window.

   If a batch status is Error, at least one line, control total, or the header is in error.

2. Click on a batch to select it and choose the Errors button to identify the problem with a batch that has the status Error. The Messages window opens. You can view all messages or query them by type: Batch Header, Batch Line Level, or Control Total.

3. To see and correct a batch, click on it in the Batch Summary window and choose the View Batch button. The Batch Header window opens with the selected batch displayed.

4. From the header window, you can view lines, control totals, or messages:

   - To view the status of individual lines in the batch, choose the Element Lines button. In the Batch Lines window, select an element and choose Find.
   - If you entered control totals for the batch, choose the Totals button on the Batch Header window to view the status for each control type.
   - To view messages for the whole batch, or all lines, or control totals, choose the Messages button. Use the option group at the top of the Messages window to control which messages are displayed.

Transferring a BEE Batch

A batch exists in the temporary BEE tables only until you run the transfer process to create element entries in the Oracle HRMS Entries table.

▶ **To transfer a batch:**

1. Query the batch in the Batch Header window, and choose the Process button.
2. Select Transfer, and choose Start. The system displays the concurrent request ID so that you can query it on the Requests window.
3. When the concurrent request is completed, query the batch in the Batch Header window.

   If the Batch Status is Transferred, there were no errors in the batch and the process has created the element entries. The process may have issued messages associated with the batch header, lines, or control totals.

   If the Batch Status is Error, the process has set the status of at least one line, or control total to Error. Check the status fields in the Batch Lines window and the Control Totals window, and review the messages issued by the process.

Purging a Batch From the BEE Tables

If the Purge After Transfer check box on the Batch Header window is checked when you run the transfer process, the batch is deleted from the BEE tables automatically after the transfer. If the box is not checked, you can purge the batch by running a separate process.

You can purge a batch with any status.

☞ **Attention:** You cannot roll back a batch transfer if you have purged the batch from the BEE tables.

▶ **To purge a batch:**

1. Query the batch in the Batch Header window, and choose the Process button.
2. Select Purge, and choose Start. The system displays the concurrent request ID so that you can query it on the Requests window.

   When the concurrent request is completed, the batch is purged.

Rolling Back a BEE Process

After a successful BEE transfer, you can roll back the transfer process if you want to completely remove it, provided you have not purged the batch from the BEE tables. You can choose to purge the batch as part of the rollback process.

The process interlock rule (which prevents you rolling back a payroll process if any further processing has taken place) does not apply to BEE Rollback. You can still perform the rollback even if run results from payroll processing exist for any of the lines.

If the batch included absence entries, the rollback removes the absence records as well as the element entries.

You run the BEE Rollback process from the Submit Requests window.

▶ **To roll back a BEE process:**

1. Select the batch header name of the process you want to roll back.
2. Enter Yes to cancel the rollback process if the system detects run results for any of the batch lines. Enter No if you want the system to complete the rollback even though run results exist.
3. Enter Yes to keep the batch after the rollback. Enter No to delete the batch after the rollback.

Making Manual Element Entries

You enter compensation and benefits for employee assignments in the Element Entries window. If the employee is assigned to a salary basis, you enter their salary in the Salary Administration window.

You can use the Element Entries window to make entries or to inquire on existing entries. Use the Period field, Classification field, and Processing Types option buttons to restrict the entries you see when making inquiries.

The Processed check box displays whether Oracle Payroll has processed the entry in the current pay period.

> **Note:** Your system administrator may have created customized versions of this window to restrict the elements you can enter by element set, classification or processing type.

▶ To enter an element for an employee:

1. If necessary, change your effective date to:
   - the correct start date for a recurring element entry
   - any date in the correct pay period for a nonrecurring element entry

   If the pay period is closed at your effective date, you cannot enter any nonrecurring elements that process in payroll runs. If a current or future pay period is closed, you cannot enter any recurring elements that process in payroll runs.
2. To reduce the list of elements to choose from, select a classification, a processing type, or both in the first region.
3. In the Element Name field, select an element.

   Note: Elements this employee is eligible for by means of a standard link appear automatically.

   The system displays a warning message if the employee fails to meet any qualifying conditions of age or length of service.
4. If the Costing field is enterable, you can enter cost codes, for example to indicate the cost center the employee's time should be charged to.

   See: Costing Information at the Element Entry Level, *Using Oracle HRMS – The Fundamentals (US)*
5. You can select a reason for an element entry you make or update. As part of your system setup, you can enter valid reasons for the Lookup Type ELE_ENTRY_REASON.

Note: There is no use for the Override, Additional, or Show Adjustment check boxes at US installations.

6. Choose the Entry Values button to open the Entry Values window.

7. Make entries in the Entry Value fields. Notice that:

   - Some fields may not be enterable.
   - Some fields may be required.
   - Some fields may have a list of values; others may be validated as you leave the field. You receive a message if your entry is not valid.
   - Some fields may contain default values. If the default value is in quotation marks, it is a "hot default".

☞ **Attention:** You should consider carefully before overriding a hot default. If you override it, then any subsequent changes to the default value on the element or element link definition will *not* affect this element entry. However, you can clear your entry if you want the default value to come back into effect.

8. To establish an earned date for an earnings element that is outside of the current payroll period, make a selection in the Date Earned field.

9. To enter information about a third party recipient of a payment resulting from a deduction element, select in the Payee Details field, the name of the third party payment method set up for this payment.

10. To determine the processing sequence of multiple entries in the payroll run, enter a subpriority number in the Processing Priority field. Lower priority numbers process first.

Making Third Party Payments

Use this process to make third party deductions and payments through Oracle Payroll. After payroll processing takes place, the pay value of the deductions element is paid according to the third party payments method you selected.

▶ **To make third party deductions from individual assignments:**

1. Create the organization or person to receive the third party payment.

   You create payee organizations in the Organization window, selecting the Payee Organization classification.

   See: Creating an Organization, *Using Oracle HRMS – The Fundamentals.*

   You create individual payees as contacts of the person making the deduction. In the Contacts window, check the Payments Recipient check box when you create the payee.

   See: Entering Next of Kin and Other Contacts, *Managing People Using Oracle HRMS*.

2. In the Personal Payment Method window, select a third party payment method for the assignment. In the Payee region, select the payee you have created.

   See: Entering Payment Methods for an Employee Assignment, *Managing People Using Oracle HRMS*.

3. Create an element entry for the deduction.

   In the Entry Values window, you enter details of payment, payee and payment method. Required entry information varies according to the kind of deduction you are making.

Adjusting a Pay Value

Oracle Payroll users can adjust the Pay Value of any normal recurring payroll element entry. When you open the Entry Values window for an entry of this kind, you will see a Show Adjustment check box in the lower left corner of the window. You do not see this check box until you have saved the entry.

You can adjust a Pay Value by adding an amount to the initial value, subtracting an amount from the initial value, or replacing the initial value with a specified amount. You can also remove an adjustment and return the Pay Value to the initial value.

The following conditions apply to adjusting a Pay Value:

- You cannot adjust an entry that has been overridden (that is, the Override check box has been checked for an entry of this element in this period).
- You can make multiple changes to the adjustment before processing but only the single most recent change to the adjustment will be processed.
- You will not overwrite the Pay Value stored in your database. The Pay Value will still be used in subsequent payroll runs. The adjustment is used in the next processing run.

▶ **To adjust a Pay Value:**

1. Query the element entry in the Element Entries window and choose the Entry Values button.
2. Check the Show Adjustment check box.

   In the Adjustment pop–up list, you will see a description of the current adjustment.

   - **None** means that there are no adjustments to the Pay Value.
   - **Add** means that the adjustment shown has been added to the Pay Value.
   - **Subtract** means that the adjustment shown has been subtracted from the Pay Value.
   - **Replace** means that the adjustment shown has replaced the Pay Value.
3. To cancel an existing adjustment, select None. Now you can enter a new adjustment, if necessary.
4. To enter a new adjustment, select Add, Subtract or Replace. You can only select Add or Subtract if the Pay Value is numeric.

5. Enter the value to add to, subtract from, or replace the existing Pay Value entry.
6. Save the change.

Deleting Element Entries

You can delete element entries in the Element Entries window.

▶ **To delete a nonrecurring element entry:**

1. Set your effective date to any date within the payroll period for which the entry exists.
2. Click on the entry to select it, choose Delete Record, and save.

▶ **To delete a recurring element entry:**

1. Set your effective date to any date within the payroll period for which the entry exists.
2. Click on the entry to select it and choose Delete Record.
3. Choose Purge in the dialog box that displays, and save.

Deleting Processed Entries

You can delete an element entry that the payroll run has processed. You receive a warning message. This does not remove the payroll run results so you can consult these for a complete record of payroll processing and payments.

To reprocess corrected element entries from the past, run the retropay processes.

See: Setting Up RetroPay, *Running Your Payroll Using Oracle HRMS*.

Listing Employees by Element

In the List Employees by Element window, you can view a list of the employees with entries to an element in any period of time you choose. You can also see the *last* entry value for each assignment.

> **Note:** If your system administrator has customized this window, you may be restricted to selecting elements of a certain processing type or element set.

▶ **To view a list of employees receiving an element:**

1. Select an element.
2. Select Current Employees, Ex–employees, or both.
3. You can also enter a date range. Both date fields default to your effective date.
4. You can enter additional query criteria in the Element Entries region.
5. Run the query.

The Element Entries region displays all entries of the element for employees of the type you selected in the chosen time period.

> **Note:** This window does not display datetracked updates to recurring element entries. You only see the *latest* value (within your chosen time period) of each element entry. The date of the last datetracked update may vary from employee to employee.

Viewing Element Entry History

In the View Element Entry History for Employee window you can view, for a single employee assignment, a history of entries for:

- One element
- All recurring elements, all nonrecurring elements, or both
- Elements from a selected classification

  Note: If your system administrator has customized this window, you may be restricted to viewing elements of a certain processing type or element set.

▶ **To view element entry history for an employee:**

1. Enter your selection criteria. You can:
   - Select a classification.
   - Select a processing type.
   - Enter a date range. The end date defaults to your effective date.
2. Place your cursor in the Element Name field and run the query.

   The window displays all entries of the types of element you selected within the time period, including datetracked updates to entries. New entries are shown in bold to contrast with datetracked updates, which are listed under the initial entry.
3. Select an entry and choose the Entry Values button to view the entry values.

CHAPTER

3

Basic Benefits

Basic Benefits

Using Oracle HRMS, you can administer the whole range of employee benefits, such as pension plans, overseas entitlements, stock purchase plans and plans providing health care coverage.

How do I enroll employees in benefit plans?

You simply enter the benefit plan for the employee, recording his or her coverage level, contribution amounts from the employee and employer, and any other information you want to record. You can enter this information, using defaults, for a whole batch of employees together.

If you need program–based enrollment or self–service enrollment on the web, you should implement the richer feature set *Standard Benefits*, instead of Basic Benefits.

Can I record coverage for dependents?

Yes, for benefits classified as Medical, Dental, Vision (health care coverage), Life (insurance coverage), or AD&D (insurance coverage for accidental death or dismemberment) you can establish coverage for the employee's dependents.

What about beneficiaries?

Employees can name both individuals and organizations as beneficiaries for benefits of certain classifications. They can specify a benefit percentage for each beneficiary, and name both primary beneficiaries and those at lower levels.

How do I administer continued coverage?

For COBRA–eligible benefit plans, you can record qualifying events, and issue standard letters informing employees or dependents of their eligibility for continued coverage. You can use statuses to track their response, select levels of coverage, set up payments schedules and record receipt of premiums.

Oracle HRMS provides a COBRA Coverage Report to help you track the employees and dependents eligible for continued coverage, the dates of their coverage periods, their premium amounts, and so on. The COBRA Payments Report helps you track amounts received and outstanding payments.

How do I control eligibility for benefit plans?

As for other forms of compensation in Oracle HRMS, you link each benefit plan to employment conditions, such as grades, organizations, full–time or part–time, jobs, salary bases, or any other employee grouping you need to define. Only employees that meet the link conditions can enroll in the plan.

If you need more complex rules–based plan eligibility or you need to control dependents' eligibility, consider using the Standard Benefits feature set in Oracle HRMS.

Can I export data to a third–party benefits administrator?

Basic Benefits does not provide any special tools to help you do this. Instead of using Basic Benefits, consider implementing Standard Benefits, which provides system extract features that are useful for exporting data to third parties.

I need to manage flexible benefits programs with flex credits.

In that case, look at the features offered by Advanced Benefits, which allows you to design flex credit based programs. You can also process flexible spending account claims, manage online life event processing, create life event triggered enrollments and communications, and model benefits eligibility based on potential life events.

Overview

Using Basic Benefits, you can set up benefit plans in just the same way you handle all other components of your compensation and benefits packages. You use *elements* to represent the various benefits available to your employees. When you give these elements a benefits classification, Oracle HRMS automatically:

- defines whether coverage is available to dependents and beneficiaries
- defines whether the plan is COBRA–eligible
- creates input values to record coverage level, and employee and employer contribution amounts (for health care plans)

Elements can represent benefits ranging from tangible items such as lunch vouchers and company cars, to perquisites such as company stock purchase or life insurance, to health care coverage plans for employees and their dependents.

To enroll employees in benefits, you make entries to benefits elements, either manually or in a batch using MIX.

Benefit Programs and Core–Plus–Options Arrangements

You may need to group benefit offerings together as a hierarchy (program, plan type, plan, option) so that administrative rules set at the program level cascade to the plans in that program. You may also need program–based enrollment for fixed and core–plus–options arrangements. These features are not supported in Basic Benefits. You need to use the Standard Benefits feature set.

Flexible Benefit Programs

If you administer your own benefits, including flexible benefit plans, consider implementing Advanced Benefits, which provides the full solution for benefits management, including self–service enrollments, management of life events, and eligibility modeling.

What To Read Next

If you decide that Basic Benefits meets your limited requirements for benefits administration, you can read more in the following topics:

- **Benefits Classifications** – describes the classifications available for benefits elements; you select one classification for each benefit.

- **Benefits Enrollment** – summarizes the procedure for enrolling employees in benefit plans, recording their beneficiaries, and setting up cover for their dependents.
- **Basic Benefits Setup** – summarizes the procedures for defining elements and other aspects of implementation.
- **Management of COBRA–Eligible Benefits** – summarizes employer responsibilities under COBRA and describes the standard letters and reports supplied for COBRA administration.

Benefits Classifications (Basic Benefits)

Oracle HRMS comes with these classifications available for elements representing benefits that are not tangible items:

- **Medical, Dental, Vision.** These three classifications are for health care insurance plans that can include dependent as well as employee coverage. Employees and employers usually share the costs. Plans may offer employee pre–tax contributions under Section 125 of the Internal Revenue Code.

Note: Oracle HRMS automatically marks as COBRA–eligible, plans with a benefits classification of Medical, Dental or Vision.

- **401(k).** For employer–sponsored Defined Contribution plans for retirement savings, in which employees can participate using pre–tax earnings. Can also have employer contributions.
- **Profit Sharing**. For plans under which the employer sets aside a percentage of profits for distribution to employees, for retirement savings. May be included within a 401(k) plan.
- **Pension**. For Defined Benefit pension plans for employees, usually fully funded by the employer.
- **Stock Purchase.** For plans under which employees can purchase stock in the enterprise, often at a discount, usually without brokers' fees.
- **Vacation Purchase.** For plans under which the employer purchases accrued but unused vacation time from employees, or employees purchase additional vacation time from the employer.
- **Life.** For group life insurance plans that are often employer–paid, but can have employee contributions. Some plans permit employees to purchase policies for dependents.
- **AD&D.** For plans frequently offered in conjunction with life insurance, to insure against accidental death or dismemberment. Often employer–paid, but can have employee contributions.
- **LTD.** For plans to insure against long–term disability. Often employer–paid, but can have employee contributions.
- **Other.** For any benefits not covered by other classifications.

Benefits Enrollment (Basic Benefits)

To enroll eligible employees in a benefit, you make entries for them to the benefit element's input values. For example, for insurance plans providing coverage for medical, dental or vision care, enrollment occurs when you make an entry for an employee to the plan's input value *Coverage Level* (employee only, employee and family etc.). Other classifications of benefits require entries to other input values.

Dependent Coverage

After enrolling an employee in a benefit that provides dependent coverage, you set up coverage as appropriate for his or her dependents. Before setting up this coverage, you enter the dependents into the database as contacts of the employee.

Beneficiaries of Benefits

After enrolling someone in a benefit for which there can be beneficiaries, you record the employee's named beneficiaries. Employees can name both individuals and organizations as beneficiaries. Further, they can specify a benefit percentage for each beneficiary, and name both primary beneficiaries and those at lower levels.

You enter individuals named as beneficiaries into the database as contacts of the employee, and organizations or institutions named as beneficiaries as organizations with the classification Beneficiary Organization.

Basic Benefits Setup

The process for setting up benefit plans in the Basic Model is very similar to the process for setting up any other form of compensation and benefit.

If you use Oracle Payroll, you initiate deductions for payments toward the cost of benefits. The system then generates elements representing the benefit plan, along with the formulas, balances, and formula rules you need to process the benefit deduction in the payroll run. You can customize the generated elements, formulas, and balances if you need to.

At Oracle HRMS sites that do not include Oracle Payroll, you define elements to represent benefits and benefit plans using the Element window. Use the primary classification Information and the appropriate benefits classification. See: Defining an Element to Hold Information: page 1 – 40. For health care benefit plans, see: Defining Benefit Plan Elements (Sites Without Oracle Payroll): page 3 – 19.

Elements for Health Care Plans

When you define an element (or initiate a deduction) for health care plans, you select one of the following three benefits classifications: Medical, Dental or Vision. The element will then automatically have these three input values:

- *Coverage*, to hold plan coverage levels such as Employee Only, Employee and Spouse, Employee and Family
- *EE Contr* and *ER Contr* (Employee and Employer Contribution), to hold either default dollar amounts or percentages, as you choose, for employee deductions and / or employer payments at a given coverage level taken to pay for the plan.

Notice that these input values are not subject to change or deletion. However you can define additional input values for the element if you require them.

You use the Benefit Contributions window to enter a list of values for the Coverage input value and default contributions for EE Contr and ER Contr. This information is stored in the Benefits Table.

> **Note:** You cannot make or change default entries to the input values Coverage, ER Contr and EE Contr using the Input Values windows that are available from the Element and Element Link windows.

Benefits Carriers

Using the Organization window, you enter benefits carriers into the database as external organizations with the classification Benefits

Carrier. You can then associate the appropriate carrier with an element representing a benefit or benefit plan, by selecting the carrier from a list when you create the benefit element.

Eligibility for Benefits

You establish employee eligibility for benefits in the same way that you set eligibility rules for any element, that is, by building element links. Links define the components that must be present in employees' assignments for the employees to be eligible for entries to the element. For example, if group life insurance is available only to employees who work full time, you can build a link for the element for this benefit to the employment category Full Time.

Management of COBRA–Eligible Benefits (Basic Benefits)

COBRA is the term commonly used to reference the Consolidated Omnibus Budget Reconciliation Act of 1985. Under this federal legislation, most employers who provide health insurance plans to employees must offer continued access to this insurance when certain changes (qualifying events) occur to the status of employees or their dependents.

Under COBRA, employers must offer continued access to group health insurance in accordance with these rules:

- Employees and their dependents must be offered continued access for 18 months after:
  - the employees' hours are reduced, or
  - they become unemployed for any reason other than gross misconduct.
- Continued access for 36 months must be offered to
  - the dependents of deceased employees
  - an employee's former spouse following divorce or legal separation
  - dependent children after they cease to be dependent
  - active employees who become entitled to Medicare.

If one of these qualifying events occurs, each qualified beneficiary must be offered an opportunity to elect to continue to receive the group health plan coverage that he or she received immediately before the qualifying event. If the plan has a core / noncore feature, the beneficiary may elect core coverage only. At the end of the 18– or 36–month period, employers must offer conversion to an individual policy if the group plan permits conversion.

To cover their administrative costs, employers can require employees and dependents electing continued coverage to pay up to 102% of the insurance premiums. In addition, employers can require disabled employees to pay up to 150% of the insurance premiums after the first 18 months of COBRA coverage.

COBRA does not affect employers with fewer than 20 employees or those with church plans. Nor does it apply to plans maintained by US federal, state or local governments.

Employer Responsibilities under COBRA

To administer continued health plan coverage under COBRA, you do the following:

- identify which of your benefit plans are COBRA–eligible
- enter and maintain information about employees' dependents
- record the events that qualify employees or dependents for continued coverage as they occur, and the qualifying dates
- notify employees, former employees and dependents of their eligibility for continued insurance coverage, and record their acceptance or rejection of such coverage. Oracle HR includes a standard COBRA notification letter you can use.

Employees and dependents have 60 days from their qualifying date or the date they receive their notification letter, whichever is later, in which to elect continued coverage. For those who make this choice, you must:

- determine and schedule the premium payments to be made for continued coverage, and record the receipt of these payments.
- record the eventual termination of their continued coverage.

Standard Letters for COBRA Notification and Termination

Oracle HR provides standard letters for informing employees or dependents of their eligibility for continued coverage, or of pending termination of this coverage. You can modify these letters as you wish using SQL*ReportWriter 2.0. The standard letters are:

- The COBRA Notification Letter, informing people of their eligibility for continued coverage under COBRA.
- The COBRA Grace Period Expiration Letter, informing people electing continued coverage that a premium payment is overdue, and that nonpayment will result in termination of the continued coverage.
- The COBRA Expiration Letter, informing people electing continued coverage that this coverage will terminate soon, because the time period over which it was available (18 or 36 months) is ending.

Standard COBRA Reports

The COBRA Coverage Report

This report shows information about the employees and dependents eligible for continued coverage under COBRA whom you have entered into the system. This report shows employees' names and assignment numbers, or dependents' names and relationships, as well as their qualifying events and dates, their notification date and their COBRA status.

For those who elect continued coverage, it shows the start and end dates of the coverage period, the benefit plan names, and the premium amounts charged.

The COBRA Payments Report

This report shows information about COBRA payments due and payments received, after you have entered this information into the system. As well as the name and assignment number or relationship of covered employees and dependents, it displays their qualifying events and dates, their amounts due and due dates, and dates of payment receipts, amounts received and amounts outstanding.

Removing Beneficiaries When Employee Benefits Stop (Basic Benefits)

To stop a benefit for an employee, you place an end date on the element entry enrolling the employee in the benefit. To accomplish this you delete the entry as of the end date. This end date then automatically applies to the beneficiaries for this benefit named in the Beneficiaries window. If you later change or remove the end date placed on the employee's element entry, perhaps to correct an error, the change or removal automatically applies as well to end dates existing for the beneficiaries.

The automatic entry, change or removal of the beneficiaries' end date ensures that people and organizations do not remain in the system as beneficiaries of benefits that no longer cover the employee.

If you must correct or remove an end date of an element entry that enrolls an employee in a benefit, and must for other reasons supply an end date for one or more beneficiaries named for the benefit, you should complete the work on the element entry before providing end dates for the beneficiaries.

See: Managing Change Over Time, *Using Oracle HRMS – The Fundamentals (US)*

Reports on Health Care Plan Eligibility and Enrollment (Basic Benefits)

Reports are available listing the employees eligible for enrollment in a health care benefit plan, and showing those actually enrolled in a benefit plan. These are the **Employee Benefit Eligibility Listing** and the **Employee Benefit Enrollment Register.**

Request reports from the Submit Requests window.

▶ **To run the Eligibility Listing or Enrollment Register:**

1. In the Name field, select the report name. Click in the Parameters field to open the Parameters window if it does not open automatically.
2. In the Organization Structure and Version fields, select the name and version of the organization hierarchy you are using to determine the employees for the report to cover. In the Parent Organization field, select the organization in the hierarchy that is the highest one whose employees the report should cover.
3. In the Benefit Classification and Benefit Plan fields, select the classification and name of the plan for which you are running the report. Choose OK when you finish your entries. Then choose Submit.

Reviewing Employee Enrollment in Benefit Plans (Basic Benefits)

You can review an employee's enrollment in health care benefit plans using the View Employee Dental, Medical and Vision Benefits window. You select the employee assignment to view from the Assignments folder. You can then see for this employee the **plan name, benefit classification** and **COBRA eligibility** for each plan in which he or she is enrolled.

For each plan you also see the **coverage level**, the **employer** and **employee contributions** at this level, the **total contribution,** and the unit of measure for the contributions, which is usually money.

> **Note:** To review coverage of an employee's dependents in a health care plan, use the Covered Dependents window.

Stopping Dependent Coverage Only (Basic Benefits)

To stop benefit coverage for a dependent while the employee's coverage remains in effect, you must use the Covered Dependents window. Unchecking the Dependent box in the Contact window for a dependent with existing dependent coverage prevents this person from receiving new dependent coverage, but is not sufficient to stop existing coverage.

▶ **To stop dependent coverage:**

1. Enter or query the employee in question, and select the Assignment button.
2. Set the effective date to the stop date of the dependent's coverage.
3. In the Element Entries window for the employee's primary assignment, select the element representing the benefit for which you are stopping dependent coverage. Choose the Others button and select Dependent Coverage to open the Covered Dependents window.
4. Query the dependent whose coverage is stopping and choose Edit – Delete Record.
5. To retain a record of this person in the database as a dependent, choose End Date and save.
6. If the person is no longer a dependent of the employee, go to the Contact window, uncheck the Dependent box, and save.

   Note: The person must remain in the database as a contact if any of the following apply:

   - he or she is still covered as a dependent under other benefits for the employee, or is eligible for, or receiving, continued benefit coverage under COBRA
   - he or she is the recipient of a garnishment payment or other payment from the employee
   - he or she is named as a beneficiary for one or more of the employee's benefits
   - he or she is a primary contact of the employee.

Stopping Employee and Dependent Coverage (Basic Benefits)

To stop a particular benefit for an employee, you place an end date on the element entry enrolling the employee in the benefit. To accomplish this you delete the entry as of the end date. This end date then automatically applies to the coverage of the employee's dependents under this benefit, and appears in the Covered Dependents window.

For example, if you put in an end date for an element entry that enrolls an employee in Dental Plan A, coverage of the employee's dependents under this plan automatically receives this end date also. This ensures that when the employee's benefit coverage ends, the coverage of his or her dependents also automatically ends. However a record of the dependent remains in the database.

If you must later change or remove an end date placed on the employee's element entry, perhaps to correct an error, the change or removal automatically applies to the coverage of the employee's dependents. So, if you later remove the end date from the employee's element entry for Dental Plan A, the system automatically removes any end dates it finds for coverage of the employee's dependents under Dental Plan A.

This means that if you must correct or remove an end date of an element entry that enrolls an employee in a benefit, and must for other reasons end the coverage of one or more dependents of the employee, you should complete the work on the element entry before ending coverage for individual dependents.

Managing Change Over Time, *Using Oracle HRMS – The Fundamentals (US)*

☞ **Attention:** Whenever coverage stops for a benefit for which employees and/or dependents may obtain continued coverage under COBRA, most employers are legally obligated to inform them of this option.

Setting Up Continued Coverage under COBRA (Basic Benefits)

▶ **To set up continued coverage under COBRA**

1. For an employee or dependent who elects continued coverage, enter in the COBRA Coverage window the Period Start Date from which the coverage will continue. The system automatically supplies the end date of the continued coverage period (either 18 or 36 months after the period start date).
2. In the COBRA Coverage window, choose the Benefits button to go to the COBRA Benefits window, which displays all the benefit plans eligible for continued coverage in which the employee was enrolled before the COBRA qualifying date.

   The Basic column of the Costs region displays each plan's basic cost, that is, the total of employee and employer contributions toward the plan.
3. Check the Accepted box for each plan for which the employee or dependent is electing continued coverage. Under Coverage**,** select the level of the continued coverage, which must be equal to or lower than the employee's original coverage.
4. Under COBRA in the Costs region, enter the premium for continued coverage of this plan. If the amount entered exceeds 102% of the basic cost of the plan, you receive a warning message, which you can override. Save your work.
5. When you finish setting up continued coverage, establish a payment schedule for the coverage. Then use this schedule to record payments as you receive them.

Defining Basic Benefit Plan Elements (Sites without Oracle Payroll)

At HR installations that do not include Oracle Payroll, use the procedure below to define elements representing medical, dental or vision benefit plans. To define other types of benefits at these installations, use the procedure for defining elements to hold information.

See: Defining an Element to Hold Information: page 1 – 40

For both procedures, use the Element window.

> **Note:** To create elements for benefits at installations that include Oracle Payroll, initiate deductions for the benefit.

> ☞ **Attention:** As this type of element definition occurs only at Oracle HRMS installations without Oracle Payroll, users carrying out this definition likely have the HR User Type profile option *HR User.* With this option, you do not see or have access to fields in the Element window needed to define elements for processing in payroll runs.

Identifying the Element and Entering Processing Rules

▶ To identify and classify the element:

1. Set your effective date early enough to handle any historical element entries you want to make.
2. Enter a unique name, reporting name and description for the element. Start the names with a letter of the alphabet (not a number or symbol). The reporting name is a short name that appears on reports, and on the statement of earnings if the element processes in the payroll run.
3. Select Information as the primary classification for the element, and Medical, Dental or Vision as its benefit classification.

▶ To enter processing information:

1. Select Recurring as the element's processing type.
2. Select Final Close as the termination rule.
3. Do not check the Multiple Entries Allowed box, the Additional Entry Allowed box, or the Closed for Entry box.

   Note: The rule Additional Entry Allowed has no applicability for US installations. It is available for use at non–US sites.

▶ To establish currencies and qualifying conditions:

1. The Input and Output Currencies appear as USD (US dollars) and you cannot change these defaults.

2. If there is a minimum age for employees to receive the element, enter it in the Age field.

3. If employees must complete a minimum length of service before receiving the element, enter a number in the Length of Service field and select a unit of measure (such as months or years) in the Units field.

4. Save the element definition.

   Note: As elements representing health care benefit plans cannot have standard links, the system does not allow you to check the Standard box.

▶ **To identify the benefit carrier and contribution frequency:**

1. Click in the Further Information field to open the Further Element Information window.

2. In the Benefits Carrier field, select the name of the carrier for this plan.

3. In the Period Type field, select a period type to identify the frequency of employee contributions to the plan.

   For example, many health care plans require monthly contributions from employees. In this case, select the period type Calendar Month.

4. Save these entries. You can now set up the element's input values.

Setting Up Health Care Plan Input Values

▶ **To select units of measure for automatically–created input values:**

1. Choose the Input Values button.

2. You see that the system has created for this element, the input values Coverage, ER Contr and EE Contr. Select Money as the unit of measure for ER Contr (Employer Contribution) and EE Contr (Employee Contribution).

3. Save your work.

   If you don't need additional input values for the element, you are ready to enter coverage levels and default contributions for the plan. See: Establishing Health Care Plan Coverage and Default Contributions, 3 – 24

   If you do need to create additional input values for the element, continue with the following procedure.

▶ **To create additional input values for the element:**

1. Enter a name for the input value and select a unit of measure for it (money, hours, character, date, number or time).
2. You can enter numbers in the Sequence field to designate the order in which the Element Entries window displays the additional input values. The input values Coverage, ER Contr and EE Contr have the sequence numbers 1, 2 and 3, respectively, and you cannot change them.
3. If the input value must have an entry, check the Required box.

▶ **To enter a default for an additional input value:**

Note: The system does not allow you to make new entries of defaults for the input values Coverage, ER Contr and EE Contr using the Input Values windows available from the Element and Element Link windows. However you can use these windows to overwrite existing defaults.

1. Make the entry in the Default field.
2. For automatic update of existing entries of a default whenever you change the default, check the Hot Default box. Hot defaults appear in the Element Entries window in quotation marks.

Warning: If you override a hot default appearing as an entry for an employee, any further changes to the element's default value do not affect this entry. For this reason, it is best to make changes to a default value for large groups of employees using the BEE facility rather than the hot default feature.

▶ **To set up validation for entries to additional input values:**

1. Choose one of these approaches:
   - Enter maximum and minimum values for the entry
   - Select a Lookup Type to act as a lookup for an input value whose type is Character
   - Select a formula to validate entries. Formulas can return messages about the success or failure of the validation.
2. Choose Warning for the system to warn of an invalid entry, or Error if it should not save a valid entry. You cannot select Warning or Error when using a lookup for validation, because in this case an invalid entry is impossible.
3. Choose Done when you are finished. You are ready to enter coverage levels and default contributions for the plan, enroll

employees in it, and establish coverage for their eligible dependents.

Establishing Benefit Coverage for Dependents (Basic Benefits)

Benefits in the following five benefits classifications can provide coverage both to employees and their dependents:

- Medical, Dental, Vision (health care coverage)
- Life (insurance coverage)
- AD&D (insurance coverage for accidental death or dismemberment)

Enroll an employee in a benefit plan using the Element Entries window then open the Covered Dependents window.

> **Note:** First use the Contact window to check that the dependents have been entered on the system. If not, enter them now. Be sure to check the Dependent box for each person, and to enter his or her gender, birth date, social security number, and address.
>
> See: Entering Dependents, Beneficiaries, and Other Contacts, *Managing People Using Oracle HRMS (US)*

▶ **To establish benefit coverage for a dependent:**

1. Set your effective date to the date this insurance coverage begins for the dependent.
2. In the Element Entries window for the employee's primary assignment, select the element representing the benefit for which you are entering dependent coverage. Choose the Others button and select Dependent Coverage to open the Covered Dependents window.
3. In the Full Name field of the Covered Dependents window, select the dependent's name. The social security number, relationship, and coverage start date all display.

   Note: The name of a dependent who already has coverage in effect as of the effective date does not appear on the list. The name of a dependent with coverage scheduled to begin on a future date does appear. You receive a message about the previously scheduled coverage when saving your entries in this window.
4. Save your work.
5. To establish coverage under this benefit for another dependent of the employee, repeat steps 3 and 4.

> **Note:** To purge a dependent from the database, you must first purge his or her record as a covered dependent, and then purge the person as a contact.

Establishing Plan Coverage and Default Contributions (Basic Benefits)

To enter coverage levels and default employee and employer contribution amounts for a health care benefit plan into the Oracle HRMS Benefits Table, use the Benefit Contributions window.

▶ **To enter plan coverage levels and contribution amounts:**

1. Query the benefit plan in the Benefit Contributions window.
2. Enter the coverage levels available for the plan in the Coverage field.
3. For each coverage level, enter an employee and an employer contribution amount. Enter an amount of zero when a plan has no contribution from the employer or from the employee.
4. Save your work. You are now ready to enroll employees in this plan.

Obtaining COBRA Reports and Standard Letters (Basic Benefits)

To obtain these reports and letters, use the Submit Requests window.

▶ **To run the COBRA Coverage or Payments report:**

1. In the Name field of the Submit Requests window, choose the report name. If the Parameters window does not automatically open, click in the Parameters field.
2. Control the list of employees and dependents the report covers by the report parameters. For example, if Termination is the parameter for Qualifying Event, the report lists only those employees and dependents eligible for continued coverage under COBRA whose qualifying event is employee termination.

▶ **To obtain a COBRA standard letter:**

1. In the Name field of the Submit Requests window, choose the letter type. The available types are:
   - COBRA Notification Letter
   - COBRA Grace Period Expiration Letter
   - COBRA Expiration Letter

   If the Parameters window does not automatically open, click in the Parameters field.
2. Enter the appropriate parameters for the letter and choose Submit. The letter prints out just as a report does. These letters do not include address information for employees or dependents.

Establishing a Payments Schedule and Recording Receipts (Basic Benefits)

To set up the payments schedule, use the COBRA Coverage window. To review the generated schedule and enter payments, go to the COBRA Payments window.

▶ **To schedule premium payments and record receipts:**

1. Go to the Payment region of the COBRA Coverage window. In the Amount Charged field, the system displays the total amount required to pay the premiums for the continued coverage elected. In the First Due Date field, enter the due date of the first premium payment.
2. In the Grace Period field of the Payment region, enter the maximum number of days that can elapse after the due date before you receive the premium payment.
3. Save your work.
4. Choose the Payments button to go to the COBRA Payments window. Use this window to review the generated schedule of due dates, premium amounts and grace dates, and to enter premium amounts and dates received.

Changing Coverage Statuses (Basic Benefits)

After notifying employees or dependents of eligibility for continued coverage, change the COBRA coverage status from Awaiting Notification to Notified. Depending on what people choose to do, the next status change is to Rejected or Elected.

When elected coverage terminates, either because the maximum time period allowed (18 or 36 months) is up or because of failure to pay premiums, change the coverage status to Terminated and select a reason for this change.

▶ **To make changes to the status of COBRA coverage:**

1. To quickly enter a status change without reviewing previous changes, use the COBRA Coverage window. Set the effective date, choose the Notify, Elect, Reject or Terminate button, and save the change. If you select Terminated, you must enter a reason.
2. To see a history of previous status changes for this coverage, choose the Statuses button to go to the COBRA Statuses window. After reviewing the changes to date, you can select another change from the list, enter the effective date and save your work.
3. If you selected Elected, now set up continued coverage for the employee or dependent.

Recording Beneficiaries for Benefits (Basic Benefits)

Employees may name beneficiaries for benefits in these classifications:

- AD&D (insurance coverage for accidental death or dismemberment)
- Life (insurance coverage)
- 401(k) (Defined Contribution plans for retirement savings)
- Defined Contribution plans for retirement savings
- Pension (Defined Benefit pension plan)
- Retirement Plans (FERS or CSRS contributions)
- Profit Sharing (plan distributing a percentage of profits to employees for retirement savings)
- Stock Purchase (plan for employee purchase of company stock)

Enroll an employee in a benefit plan using the Element Entries window then open the Beneficiaries window.

Employees may name as their beneficiaries both individuals and organizations, such as charities, hospitals, and educational or religious institutions.

> **Note:** First use the Contact window to check that the beneficiary individuals have been entered on the system. If not, enter them now. Be sure to check the Beneficiaries box for each person, and to enter his or her gender, birth date, social security number, and address.
>
> See: Entering Dependents, Beneficiaries, and Other Contacts, *Managing People Using Oracle HRMS (US)*
>
> Enter organizations that are beneficiaries into the system using the Organization window, giving them the classification *Beneficiary Organization*. Be sure to enter a location with an address for the organization.
>
> See: Creating an Organization, *Using Oracle HRMS – The Fundamentals (US)*

▶ To record a beneficiary for a benefit:

1. Set your effective date to the date the person or organization becomes a beneficiary of the benefit.
2. In the Element Entries window for the employee's primary assignment, select the element representing the benefit. Choose the Others button and select Beneficiaries to open the Beneficiaries window.

3. In the Level field, select Primary, Second, Third, or Fourth as the level of the beneficiary you are entering. All primary–level beneficiaries who survive the employee become the actual beneficiaries of the benefit.

   If no primary beneficiaries survive the employee, the second–level beneficiaries become the actual beneficiaries, and so forth through levels three and four. There is no limit on the number of beneficiaries you can enter at a level.

4. In the Name field, select the name of the beneficiary. The list includes all contacts marked as beneficiaries for this employee, and all organizations with the classification Beneficiary Organization. The system displays the beneficiary's type (contact or organization) and start date.

   Note: A beneficiary already on record as of the current effective date for this benefit of the employee does not appear on the list. A beneficiary already entered to go into effect on a future date does appear. You receive a message about the future–dated entry when saving your entries in this window.

5. In the Percentage field, enter to two decimal places the percentage of the benefit to which this beneficiary is entitled. For example, for 33.34% enter 33.34. If the total of percentages entered for beneficiaries at a level does not equal 100.00 as of the current effective date, you receive an error message.

   If you enter a percentage that causes the total for beneficiaries at this level to be greater or less than 100.00 as of another date, the system notifies you of the date but permits you to save the entry. Change your effective date to this date, and make the necessary adjustments.

   Note: If some but not all of the beneficiaries at a level predecease the employee and he or she does not specify an adjustment of the percentages for the remaining beneficiaries, such adjustment must be done off line.

6. To list additional beneficiaries for this benefit, repeat steps 3 through 5.

7. Save your work.

   Note: To purge a beneficiary from the database, you must first purge the record of the person or organization as a beneficiary, and then purge the entry of a contact or an organization.

Recording COBRA Qualifying Events (Basic Benefits)

To administer COBRA–eligible benefit plans, you use the COBRA Coverage window.

▶ **To record a qualifying event and its date:**

1. For all qualifying events except termination, set your effective date to the qualifying date. This is the day after the date of the qualifying event, that is, the day on which current benefit coverage would cease.
2. In the COBRA Coverage window, select the qualifying event from the list. The following events require you to offer continued coverage of COBRA–eligible benefit plans to **employees**, together with any dependents previously included in their coverage:

   - Medicare entitlement
   - Reduced work hours which result in the loss of coverage
   - Termination

   When selecting one of these events, do not enter a dependent's name or relationship.

   > **Note:** For the events Reduced Hours and Termination, the system checks for a reduction in the employee's standard working hours or for a termination. If it finds no hours reduction or termination, it issues an error message.

   The following events require you to offer continued coverage to **dependents**:

   - Death of Employee
   - Divorce or Legal Separation
   - No Longer Dependent

   For one of these events, select also the name and relationship of the dependent responsible for electing and paying for any continued coverage, for example, the spouse of a deceased employee. If it is unclear which dependent to select, for example if all the dependents of a deceased employee are minor children, consult your Benefits Administrator.
3. The status of COBRA coverage resulting from entry of the qualifying event defaults to Awaiting Notification, as of the effective date. Save your work at this status. After sending out notification of eligibility for continued coverage, and when this coverage is rejected or accepted, enter status changes.

Removing Beneficiaries When Employee Benefits Continue (Basic Benefits)

To remove a beneficiary while a benefit remains in effect for the employee, you must use the Beneficiaries window. Unchecking the Beneficiary box in the Contact window prevents a person from being named as a beneficiary in the future, and removing the classification Beneficiary Organization prevents an organization from being named as a beneficiary in the future. However these actions are not sufficient to remove the person or organization as a currently–named beneficiary.

▶ **To remove a beneficiary while maintaining coverage:**

1. Enter or query the employee, and choose the Assignment button.
2. Set your effective date to the end date for the beneficiary.
3. In the Element Entries window for the employee's primary assignment, select the element representing the benefit for which you are removing the beneficiary. Choose the Others button and select Beneficiaries to open the Beneficiaries window.
4. Query the beneficiary to be removed, choose Edit – Delete Record, and save.
5. To retain a historical record of the removed beneficiary, select End Date and save.
6. If the removed beneficiary is no longer a beneficiary of any of the employee's benefits, go to the Contact window, uncheck the Beneficiary box, and save.

   Note: A contact removed as a beneficiary of a benefit must remain in the database as a contact if any of the following apply:

   - he or she is currently receiving benefit coverage as a dependent of the employee, or is eligible for, or is receiving, continued benefit coverage under COBRA
   - he or she is the recipient of a garnishment payment or other payment from the employee
   - he or she is named as a beneficiary for any other benefits of the employee
   - he or she is a primary contact of the employee.

CHAPTER

4

Salary Administration

Salary Administration

Using the *Salary Administration* functionality in Oracle HRMS you are able to manage efficiently the basic remuneration that employees receive.

How does HRMS enable you to administer salaries?

You can enter salary amounts or wage rates for all new employees that take effect immediately. You can also enter proposals for salary changes and identify the various components making up the changes. For rapid updates to many salaries, you can download salary information to a spreadsheet, modify it, and upload again using Application Data Exchange (ADE).

Once you have proposed salary changes, you can approve and implement the proposed changes quickly and easily.

Can you associate salary changes with performance reviews?

Yes. You are able to associate all salary changes with the result of performance reviews. Also, you can identify which components of a salary change are associated with performance, such as merit awards.

Can you analyze and compare salaries for groups of employees?

Yes. You can report on current and previous salaries for groups of employees (such as employees in a selected organization or on a certain grade). You can compare salaries to the mid point defined for a grade. You can download salary proposals to a spreadsheet for "what if" analysis.

Using BIS you can review current and proposed salaries of comparable groups of employees.

Can you map market salary surveys to information for your enterprise?

Yes. Using Oracle HRMS you enter the results of different salary surveys. For example, you can record the minimum and maximum salaries for jobs within your industry. You can then link the salary survey details to jobs and positions within your enterprise.

If Payroll is installed, does this link to pay?

Yes. Salary Administration provides information to payroll about employees' current salary amounts.

Salary Administration Overview

If you are administering salaries on an individual basis, use the Salary Administration functionality to manage the basic remuneration that employees receive. However, if you administer salaries for groups of employees, Oracle HRMS provides you with alternative methods to suit the needs of your enterprise.

Administering Salaries for Groups

For example, if you administer salaries by grade, enter salaries on a grade scale, assign employees to grades and place them on the appropriate point of their grade scale.

> **Note:** This approach cannot be used in US–HRMS and may not be available in some other HRMS localizations.

If you administer salaries by grade and pay scales, enter salaries as progression point values. Do not use Salary Administration to confirm changes for grade step employees. This is unnecessary, and has the disadvantage that when you change point values you will need to update every salary record to which the change applies.

If you use Oracle Payroll, you can write a salary formula that uses the grade rate or pay scale rate to calculate each employee's salary pay value.

Salary Information for Analysis and Payroll Calculation

The salary amounts or wage rates you enter or change provide your enterprise with information for analysis purposes. If you are also using Oracle Payroll, they also provide some of the values used in the payroll calculations. If you are using another payroll system, they can also provide salary information for that payroll to process.

Manipulating Salary Information in a Spreadsheet

The Salary Management Folder enables you to select sets of assignments for which you want to enter or approve salary proposals. Using Application Data Exchange (ADE), you can download this information from the folder to a spreadsheet. Here you can manipulate the data to create new salary proposals or to modify existing proposals. You can then upload your revised salary information to the database. If your responsibility permits, you can approve all or selected proposals in the folder.

Market Salary Surveys

Using Oracle HRMS you can enter salary details from surveys conducted across your industry. You can then link the survey details for individual jobs, called salary survey lines, to the jobs and positions you use in your enterprise.

> **Note:** You can also download information from market survey companies using APIs.

Key Concepts

To enable you to manage the basic remuneration that employees receive, you need to understand the key concepts that underpin the Salary Administration functionality. The key concepts are:

- Salary Earnings Elements
- Salary Basis
- Starting Salary and Salary Proposals
- Salary Components
- Salary Spreadsheets

To enable you to effectively enter information about salary surveys you need to understand another key concept. This concept is salary survey identifiers.

Salary Earnings Elements

For Salary Administration, you need at least one salary earnings element for each group of employees whose salary is quoted on the same basis (such as hourly or monthly). You then link these elements to components of employee assignments, to determine which employees are eligible for a particular element. Oracle Payroll can process these elements in payroll runs to generate salary amounts for employees. A third party payroll can take information from these elements for use in generating amounts for employees.

HR–Only

If you are an HR–only customer, you need to work closely with your Payroll Department to ensure that the elements used in Salary Administration are correctly set up for transmission of information to whatever payroll is in use.

Predefined Earnings Elements

Some HR localizations have certain predefined earnings elements already set up when you receive your HR system. For example, US–HRMS includes the predefined earnings elements Regular Salary and Regular Wages. Depending on your requirements, you may decide to use some predefined elements to represent actual earnings types in your system.

If you are an Oracle Payroll user, you will also get other predefined elements.

However, predefined elements cannot be changed in any way. For this reason, you may decide to use the predefined elements simply as models for other earnings elements that you define to meet the particular requirements of your enterprise.

If predefined elements are not available to represent all the earnings types and salary bases you need for your Salary Administration setup, you must create your own elements for this purpose.

Pre-defined Earnings Elements

You may be able to use the predefined earnings elements Regular Salary and Regular Wages in your salary administration setup. However if these elements do not exactly meet your requirements, you may need to define your own, taking the predefined elements as models.

Pre-defined Elements

The earnings elements Regular Salary and Regular Wages belong to the classification Earnings and the category Regular. They both have the processing type Recurring.

Name	Purpose of Entry
Pay Value	Short–circuits formula and provides Regular Salary run result.
Monthly Salary	Can accept monthly salary amount from salary administration. In payroll processing, gives amount of employee's monthly salary to formula for salary calculation.
Jurisdiction	Taxation code entry here overrides employee's regular work location taxation code.

Table 4 – 1 Regular Salary Input Values

Name	Purpose of Entry
Pay Value	Short–circuits formula and provides Regular Hourly Wage run result.
Rate	Can accept hourly salary amount (hourly rate) from salary administration. In payroll processing, gives formula the rates to use for calculation of wages. Entries here override Rate Code entries.
Monthly Salary	In payroll processing, gives formula for calculation of wages, the codes by which to locate rates in the Wage Rates table.
Jurisdiction	Taxation code entry here overrides employee's regular work location taxation code.

Table 4 – 2 Regular Wages Input Values

If you can use Regular Salary and Regular Wages in your system but need additional elements for Salary Administration purposes, create them using the Regular Salary element as a model.

See: Creation of Elements: page 4 – 14

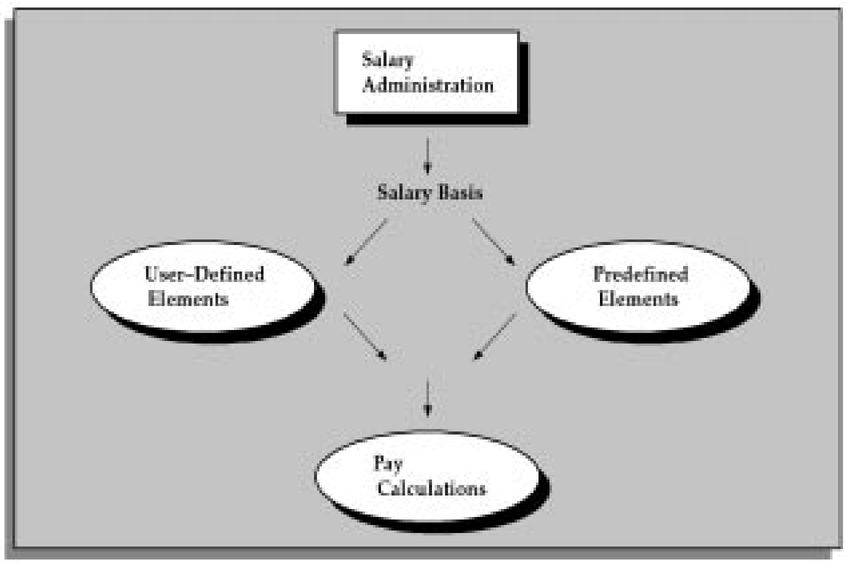
Salary Basis

When your elements for use in Salary Administration are in place and you have defined links for them, you associate an element with each *salary basis* in use in your enterprise. The salary basis establishes the duration for which a salary is quoted, such as, hourly (for example, 1,000 yen per hour) or annually (for example, £18,000 per year).

The salary basis is not necessarily the same as the pay frequency. For example, an employee with an hourly pay rate can have the salary basis Hourly Salary, but can have an assignment to a weekly payroll and therefore have a weekly pay frequency.

> **Note:** You cannot use the Element Entries window or MIX facilities to make entries to any elements that are associated with salary bases. You must use the Salary Administration window to enter and maintain entries for the element.

Figure 4 – 1 Elements and Salary Basis for Payments



Starting Salary and Salary Proposals

For new employees, you use Salary Administration to enter starting salary amounts, which receive approval automatically. You can enter a proposed salary change for a current employee at any time. You can enter a salary proposal as:

- A new amount
- A single change amount or multiple change amounts
- Percentages (reflecting different factors or reasons contributing to the change, such as a merit award plus a cost of living component)

To hold multiple reasons for a salary change, you break down a proposal into two or more components. Each component represents a different reason for changing the salary. You can define as many reasons as you require using the Lookup Type PROPOSAL_REASON. Examples of components are Merit Award and Cost of Living Increase.

Optionally, you can select a performance review to associate with a salary change. Also, when you set up salary administration, you can enter grade rate ranges against which the system validates salary proposals, if required.

Salary Change Approval

A salary proposal does not go into effect until it receives approval. If you have recorded multiple components of a salary proposal, you can approve each component independently. When an unapproved proposal exists for an assignment, you must either approve or delete it before you can enter a new proposal.

When you approve a salary, Oracle HRMS creates or updates a salary element entry for the assignment. You can view this entry in the Element Entries window, but you cannot change it there.

> **Note:** You can approve components, but you may not be able to approve salaries. This is controlled by a menu function set up by your system administrator.

Current Salary Review

Before entering salary proposals, you can review the current salaries of comparable groups of employees. There are a number of ways to do this. For example, you can query a list of assignments in the Salary Management folder and run the Salary Review Report to view current and previous salaries.

To see all the ways you can review the current salaries, go to Reviewing Current Salaries: page 4 – 23.

Salary Components

Salary changes can be broken down into two or more components, to reflect different reasons for the change. You can approve each component of the proposal separately.

Ten salary components are predefined, as shown in the following table. You can create as many additional components as you require. However, only ten components can be displayed in the Salary Management folder. If you want your new components to be displayed in the folder instead of the default components, you must update a view.

This task is for system administrators.

Predefined Salary Component	Lookup
Cost of Living	COL
Job Evaluation	JOEV
Location Adjustment	LOAD
Market Adjustment	MKAD
New Hire	NEWH
Performance	PERF
Periodic Review	PERE
Progression	PROG
Promotion	PROM
Transfer Adjustment	TRAD

Table 4 – 3 Predefined Salary Components

Salary Spreadsheets

Using Application Data Exchange (ADE), you can download information from the Salary Management folder to a spreadsheet. Here you can manipulate the data to create new salary proposals or to modify existing proposals. You can then upload your revised salary information to the database. If your responsibility permits, you can approve all or selected proposals in the folder.

The changes you make in the spreadsheet are checked when you upload them to the database. To minimize errors, follow these rules:

- Do not enter components for a first salary (for example, for a new hire). Enter a proposed amount and change date only.
- Enter changes for the full salary or for components but not for both.
- If you enter components, make sure you enter a value (Y or N) in the Approved field for each component.
- Do not alter a Change Date that was downloaded from the database.
- Do not enter information in the grey fields (except for Change Date).
- Note that the Change Amount is given precedence over the Change Percentage. If you enter inconsistent values, the upload process records the new change amount and adjusts the percentage to match. If you want to record a percentage change, clear the amount field.
- If you want to delete a component, clear both the change amount and percentage fields for that component.

Salary Survey Identifiers

One of the key concepts when setting up your salary survey information is the salary survey identifier. When users are entering details about a salary survey, they must enter the identifier. This controls the values they can see in certain fields of the Salary Survey window. By using identifiers, you ensure that, for each type of survey, the user:

- Only has the relevant information to select from
- Enters information quickly and efficiently

Lookup Types Used in the Salary Survey Window

On the Salary Survey window the following fields are set up using the following user extensible Lookup types:

- Survey job name.
- Survey region.
- Survey seniority.
- Company size.
- Industry.
- Survey age.
- Survey Company

To control the values displayed for each type of survey, use the salary survey identifier as the two characters of your Lookup code. For example, you could use DB at the beginning of all Lookups to be displayed for Dun and Bradstreet surveys.

Salary Administration

Use the *Salary Administration* windows to manage efficiently the basic remuneration that employees receive.

Set Up Salary Administration

1. Create (or Decide on) Salary Elements: page 4 – 14
2. Link the Salary Element: page 4 – 15
3. Define a Salary Basis: page 4 – 16
4. Review or Create Salary Components: page 4 – 19

   Review the salary components predefined as values for the Lookup Type PROPOSAL_REASON. If you want your new components to be displayed in the Salary Management folder, you must also change a view. See: Creating Salary Components: page 4 – 19
5. Adding Lookup Types and Values, *Customizing, Reporting, and System Administration in Oracle HRMS (US)*

   If you want to record performance ratings such as Outstanding, Superior and Average, enter them in the Lookups window for the Lookup Type PERFORMANCE_RATING.
6. Define Menus, *Customizing, Reporting, and System Administration in Oracle HRMS (US)*

   Add the function "Salary Administration Approve" to the menu of responsibilities that should be able to approve salary proposals. Without this function, users can enter salary proposals but they cannot approve them.
7. Assign Employees to a Salary Basis, *Managing People Using Oracle HRMS (US)*

   Assign employees to a salary basis using the Salary Information region of the Assignment window. Also assign employees to a grade, if you have associated a grade rate with the salary basis.
8. Validate Salary Entries: page 4 – 20

Creating a Salary Element

You need at least one salary element for each salary basis in your enterprise.

If predefined elements exist in your localization, you might decide to use these. If your localization does not include predefined elements, or if the predefined elements are insufficient or inappropriate, you must create these elements.

You create a salary element in the Element window.

▶ To create a salary element:

1. Set your effective date to a day on or before the start of the first payroll period for which you want to enter salaries.
2. Enter a name for the element, and select the classification Earnings.
3. Select the type Recurring.
4. Do *not* check the Standard check box.
5. Save the element, then choose the Input Values button.
6. Create one input value to hold the salary value in the Input Values window. If you want to associate this element with more than one salary basis, create one input value for each salary basis.

   Suggestion: If the salary basis is different from the payroll periods of the employees who will receive this element, make this clear in the input value name. For example, if the salary basis is Annual, you could name the input value Annual Salary.

   Also, you can use the input value unit of Number instead of Money to enter salaries of up to 5 decimal places. For example, if you pay your employees' £10 per day and a day consists of 7 hours, you can set up the input value unit as Number, this enables you to enter the employee's hourly rate as £1.4286. If the average day is 8 hours you could use the input value unit of Money because the hourly rate of £1.25 only requires two decimal places.

7. Optionally, enter validation criteria for the input value, such as a Minimum and Maximum value, or a formula to perform the validation, if required. Select Error in the Warning or Error field.

   See: Validating Salary Entries: page 4 – 20

   Note: If you select Warning, users do not see the warning in the Salary Administration window.

8. Save your work.

Linking the Salary Element

Link the salary elements to components of employee assignments to establish employee eligibility for the elements.

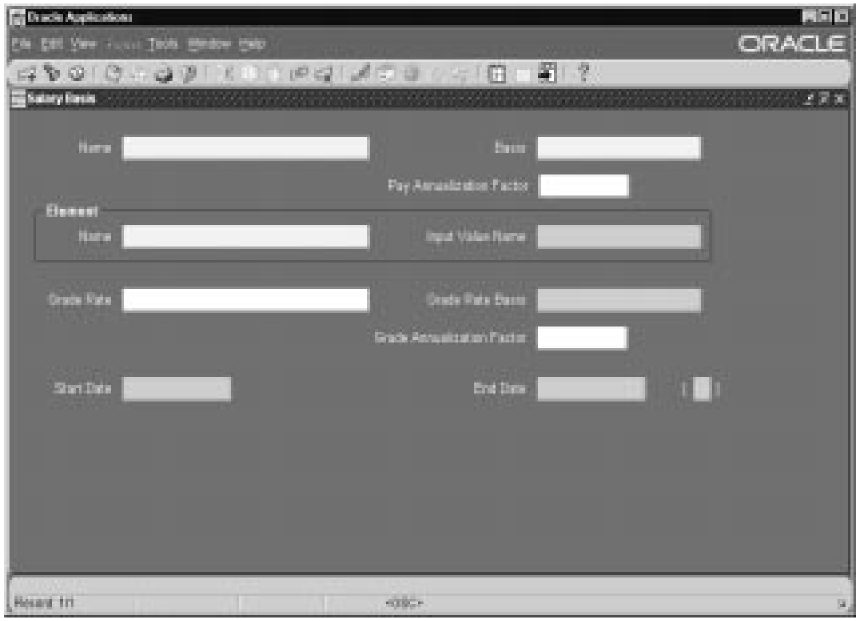
Use the Element Link window to link the salary element.

▶ **To link the salary element:**

1. Set your effective date to a day on or before the start of the first payroll period for which you want to enter salaries.
2. Select your new salary element.
3. Do not check the Standard check box.
4. Select eligibility criteria for this element. If you want to make the element available to all employees, do not select any criteria.
5. Save the link.
6. If you want to enter different validation criteria for different eligibility groups, you can change the Min and Max valid values in the Link Input Values window.

Defining a Salary Basis

Use the Salary Basis window to define a *salary basis* for each salary element to be used for salary administration. This establishes the duration for which a salary is quoted, for example, hourly, monthly or annually.



▶ **To define a salary basis:**

1. Enter an appropriate name for the salary basis.

   If you are using predefined elements, go to step 4, otherwise go to step 2.

Without predefined elements

2. Select a pay basis, for example, Annual or Hourly.

   If you selected Annual or Monthly, Oracle HRMS identifies the number of payments and enters 1 or 12 in the Pay Annualization Factor field. You can change this value, if required.

   If you selected Hourly, the Pay Annualization Factor field is blank. Enter your own values, if required.

   If you select Period, leave the Pay Annualization Factor field blank, Oracle HRMS uses the payroll period of your employee as the annualization factor.

Note: The pay basis is for information only. For example, to enable you to compare salaries.

3. Select the name of the salary element and input value associated with this salary basis.

   Now go to step 6.

With predefined elements

4. Select the appropriate pay basis for the predefined element you plan to use. For example, select Monthly Salary for the Regular Salary element in the US.

   If you selected Annual or Monthly, Oracle HRMS identifies the number of payments and enters 1 or 12 in the Pay Annualization Factor field. You can change this value, if required.

   If you selected Hourly, the Pay Annualization Factor field is blank. Enter your own values, if required.

   If you select Period, leave the Pay Annualization Factor field blank, Oracle HRMS uses the payroll period of your employee as the annualization factor.

   Note: The pay basis is for information only. For example, to enable you to compare salaries.

5. Select the appropriate element and input value (for example, in the US, Regular Salary and the input value Monthly Salary, or Regular Wages and the input value Rate).

All

6. Select a grade rate to associate with the salary basis, if required.

   Oracle HRMS uses the grade rate to validate your salary proposals. You receive a warning if the salary you enter for an employee is not within the grade rate range defined for the employee's grade.

   In doing this check, the system takes account of the hours in the employee's standard work week. It compares the hours on the employee's assignment with those entered for their organization.

   If the employee works fewer than the standard hours per week for the organization, the system pro–ratas the permissible minimum and maximum grade rate values before validating the salary.

7. Select the grade rate basis (Hourly, Monthly, Annual, or Period) for the rate if you selected a grade rate. For example, if your grade rate specifies the valid *monthly* salary ranges for each grade, select Monthly Salary in the Grade Rate Basis field.

If you selected Annual or Monthly, Oracle HRMS identifies the number of payments and enters 1 or 12 in the Grade Annualization Factor field. You can change this value, if required.

If you selected Hourly, the Grade Annualization Factor field is blank. Enter your own values, if required.

If you selected Period, leave the Grade Annualization Factor field blank, Oracle HRMS uses the payroll period of your employee as the annualization factor.

Note: This is for information only. For example, to enable you to compare salaries within grades.

8. Save your changes.

Creating Salary Components

You can create as many additional salary components, as you require. However, only ten components can be displayed in the Salary Management folder. If you want your new components to be displayed in the folder instead of the default components, you must update a view.

▶ **To create new salary components to display in the folder:**

1. Query the Lookup Type PROPOSAL_REASON in the Lookups window and add a new code for each new component.
2. Open the View file peupl01v.sql in a text editor.
3. Go to the component reason list and replace the default Lookups with the new codes you have created.

   Note: There are two places in the file where you need to change these codes.
4. Go into SQL*Plus as hr user and run the edited script.
5. Change the column names in the Salary Management folder by choosing Change Prompts from the Folder menu.

Validating Salary Entries

There are two ways to validate salary entries:

- You can *warn* users when they enter a salary proposal that is outside a valid range defined for an employee's grade. This approach uses grade rate ranges.
- You can *prevent* users from approving a salary that is outside a valid range, or that fails validation performed by a formula. Notice that this validation is not performed until you try to approve a salary proposal. This approach uses element input value validation.

▶ **To validate salaries against grade rate ranges:**

1. Create a salary grade rate and enter minimum, maximum, and midpoint values for each grade.

   See: Defining a Grade Rate, *Using Oracle HRMS – The Fundamentals*.

2. When you define the salary basis, select your salary grade rate.

   See: Defining a Salary Basis: page 4 – 16

3. Assign your employees to grades.

▶ **To validate salaries using input value validation:**

1. If you want to validate salaries using a formula, create your formula in the Write Formulas window.

   See: Writing Formulas for Validation, *Using Oracle FastFormula.*

2. When you define an input value for the salary element, you can select a formula to perform validation, or you can enter minimum and maximum valid values.

   See: Creating a Salary Element: page 4 – 14

3. If you want to vary the validation for different groups of employees, you can enter validation criteria in the Link Input Values window.

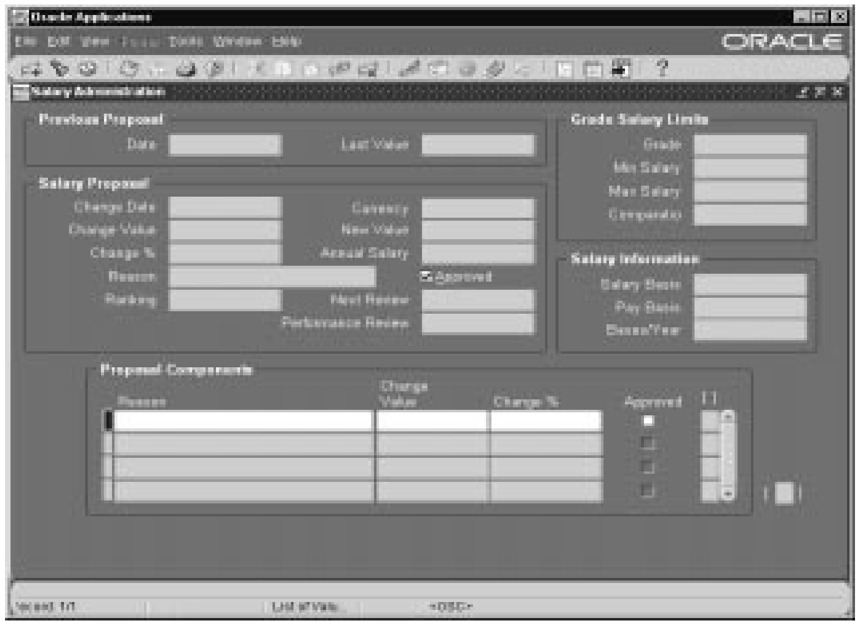
   See: Linking the Salary Element: page 4 – 15

Entering Salary for a New Employee (or One Assigned to a New Salary Basis)

Use the Salary Administration window to enter a starting salary amount for a newly hired employee, or to enter a salary amount for a current employee assigned to a new salary basis. This could be, for example, an employee moving from an hourly wage to a monthly salary.

Notice that you cannot enter multiple components of a starting salary for a newly hired employee or one assigned to a new salary basis.

You must assign a payroll to an employee before entering a salary.



Use the Salary Management folder to approve multiple salary proposals or to download salary information to a spreadsheet. In the spreadsheet you can enter new proposals, edit existing proposals, and approve salary components. Then you can upload your changes to the database.

▶ **To enter a salary for a new employee (or one assigned to a new salary basis):**

1. Enter the start date for the salary in the Change Date field (in the Salary Proposal region). For a new hire, this is usually the hire date.

   Note: The employee must have an active assignment on this date. If you are changing the salary basis, you must enter the exact date it changes.

2. Enter the amount of the salary in **either** the Change Value or the New Value field.

3. Select a reason for the salary, if required.
4. Rank the employee if required.

   For example, you might want to rank the employee at the time of the proposal and track them later on. If you do rank the employee, enter a value greater than zero.
5. Enter or change the Next Review date, if required.
6. Select a performance review to associate with the salary review, if required. This is a performance review you previously created using the Performance window.
7. Save the new salary.

   Note: You do not have to approve the new salary, Oracle HRMS approves it automatically.

Reviewing Current Salaries

Before entering salary proposals, you can review the current salaries of comparable groups of employees. There are a number of ways to do this:

- Query a list of assignments in the Salary Management folder to view their current salaries and any existing salary proposals. You can view up to ten salary components (such as Cost of Living, Location Adjustment, or Promotion) for each proposal.

  See: Using the Salary Management Folder: page 4 – 28

- Query lists of assignments receiving a particular salary element on the List Employees by Element window. This shows the latest approved salary for each assignment in the date range you select.

- Run the Salary Review Report to view current and previous salaries for all employees, or for employees assigned to a selected organization, job, position, and / or grade.

  See: Running the Salary Review Report: page 4 – 31

- Query a list of assignments in the Assignments folder then view the salary history for each assignment in the list, individually, using the Salary History window. This window displays the dates, reasons, and amounts of each approved salary change, and of any new salary proposal.

  See: Viewing Salary History: page 4 – 30

- If you use grade rates, you can view the salaries of all employees on a certain grade receiving a particular salary element, using the View Employee Grade Comparatio window. This window also displays each employee’s salary as a percentage of the midpoint defined for the grade.

  See: Viewing Grade Comparatios, *Using Oracle HRMS – The Fundamentals.*

- If you use pay scale rates for salaries, you can report on the salaries of all employees or a group of employees using the Employee Increment Results report.

  See: Running the Employee Increment Results Report, *Using Oracle HRMS – The Fundamentals.*

Proposing a Salary Change for a Current Employee

Use the Salary Administration window to propose a salary change for a current employee at any time. You can enter a salary proposal as a new amount, a single change amount or multiple change amounts or percentages (reflecting different reasons, such as a merit award and a cost of living component).

If there is an unapproved salary proposal recorded for the assignment, approve or delete it first before entering a new proposal.

You might want to associate a salary proposal with a performance review before you enter the salary proposal information. If you already have the Salary Administration window displayed, choose the Performance button, otherwise, from the Assignment window select Others then Performance. Complete the relevant information.

See: Entering Performance Ratings, *Managing People Using Oracle HRMS*.

▶ **To propose a salary change for a current employee:**

1. Enter the date when the new salary comes into effect in the Change Date field in the Salary Proposal region.

   Note: If you are changing the salary basis, you must enter the exact date it changes.

2. There are several ways to enter a proposal:

   - Enter a new amount, or single change amount or percentage – go to step 3
   - Enter multiple components – go to step 6.

Entering a New Amount or the Amount of Percentage Change

3. Enter a new salary amount, or the amount or percentage of the proposed change in the Salary Proposal region.
4. You can select a reason for the overall salary change.
5. You can approve the proposal, by checking the Approved box, if you have the authority.

Entering Multiple Components

Enter each component of the salary proposal in the Proposal Components region.

6. Select the reason for the first component of the proposal.
7. Select either the amount or percentage of the component.

   Each percentage is applied to the last approved salary. For example, if the last approved salary is 3000 and there are two components of 10% and 5%, the new amount is 3000 + 300 + 150.

Note: To effect a salary decrease, enter a negative number in the Change Value or Change % field.

8. Repeat step 6 and 7 to enter each remaining component.
9. You can approve each component, by checking the Approved box independently. However, none of the approvals go into effect until you approve the overall proposal.

Changing Other Information

10. Enter or change the Next Review date, if required. (If you entered a time period for regular salary reviews in the Salary Information region of the Assignment window, the date of the next review appears automatically.)

Saving Your Proposal

11. Save your proposal.

Approving a Salary Change

Use the Salary Administration window to enter a salary amount for a new employee, to propose a salary change for a current employee or to approve a salary proposal.

A salary proposal does not go into effect until it receives approval. If you have recorded multiple components of a salary proposal, you can approve each component independently.

> **Note:** You can approve components, but you might not be able to approve salaries. This is controlled by a menu function set up by your system administrator.

▶ **To approve a salary change:**

1. Query the proposal.
2. Check the Approved box in the Salary Proposal region, and save.

   If some individual components were not already approved, you are warned and they are automatically approved if you continue.

Correcting or Deleting a Salary Entry

You enter and approve salary proposals in the Salary Administration window. You can also correct or delete salary entries in this window.

You can only delete the latest proposal, and therefore, you can only delete one proposal at a time.

▶ **To delete an approved salary:**

1. Query the proposal.
2. Delete the proposal. Oracle HRMS deletes all proposal components—you do not need to delete components individually.

▶ **To correct an approved salary:**

1. Query the proposal.
2. Delete the salary record and enter a new one.

   If you discover an error in a proposal approved in the past, after which more recent approved proposals are on record, you must delete and reenter every proposal from the one last approved back through the incorrect one.

Deleting Salary Entries After Payroll Processing

When you delete an approved proposal that the payroll run has processed, you receive a warning message. You can continue to delete the record, but you must of course correct the processing.

> **Note:** Deleting processed salary entries does not remove the payroll run results, so you can consult these for a complete record of payroll processing and payments.

To reprocess corrected element entries from the past, run the retropay processes.

See: Setting Up RetroPay, *Running Your Payroll Using Oracle HRMS*.

Using the Salary Management Folder

Using the Salary Management Folder, you can select sets of assignments for which you want to enter or approve salary proposals. For each assignment, the folder can display the current approved salary and proposed new salary, including up to ten salary components.

Using Application Data Exchange (ADE), you can download information from the Salary Management folder to a spreadsheet. Here you can manipulate the data to create new salary proposals or to modify existing proposals. You can then upload your revised salary information to the database. If your responsibility permits, you can approve all or selected proposals in the folder.

▶ **To manipulate salary proposals in a spreadsheet:**

1. In the Salary Management folder, query the assignments you want to process.
2. Click on the ADE icon on the Oracle HRMS tool bar.
3. In the ADE Fetch Data window, select the style Salary Proposals and select the action Spreadsheet. Choose Start.

   This launches your spreadsheet application and iconizes ADE.
4. Edit the data in the spreadsheet. Save the spreadsheet with a new name (to prevent it being overwritten the next time ADE is run).

   For further information about the rules to follow when editing the data in your spreadsheet, see: Salary Spreadsheets: page 4 – 11
5. Exit your spreadsheet application.
6. In ADE, choose the Upload button.

   Note: If the Upload button is not available, ask your system administrator to create the function HR_HRIO_ENABLE_UPLOAD and add it to your menu.
7. Choose Load and select the spreadsheet that you saved.

   You can review your changes in the built–in ADE spreadsheet. The Status column shows which rows have been updated.
8. Choose Upload.

   The updated information is uploaded to the database. The Status column records any errors encountered during the upload.
9. To view your new proposals in the Salary Management folder, re–query the data.

Approving Multiple Salary Proposals

If the Approve button is displayed in the Salary Management folder, you can select multiple assignments in the folder and approve them.

> **Note:** If the Approve button is not displayed, you cannot approve salaries. This is controlled by a menu function set up by your system administrator.

When you approve a salary, Oracle HRMS creates or updates a salary element entry for the assignment. You can view this entry in the Element Entries window, but you cannot change it there.

▶ To approve multiple salary proposals:

1. In the Salary Management folder, query the assignments you want to process.
2. Select the assignments you want to approve and choose the Approve button. To select multiple assignments, hold down the CTRL key and click on the assignment records you want to select.

Viewing Salary History

Oracle HRMS maintains a complete history of approved salary changes for an employee, along with associated performance reviews. In the Salary History window, you can view the dates, reasons, and amounts of each approved salary change, and of any new salary proposal.

You can also review salary history by running the Salary Review Report: page 4 – 31.

The Salary History window contains a folder. You can enter a query in the folder to reduce the list of salary changes displayed. You can remove, rearrange, add, or resize fields in the folder if you have access to the folder menu.

The **Change** field shows the amount of the salary change, and the **Actual** field shows the new salary effective from the **Change Date**. The **Hourly**, **Monthly**, **Annual**, and **Payroll** fields show the salary prorated to these periods. The **Currency Code** field shows the currency in which the salary was paid and the **Ranking** field shows the employee rank. The **Mid**, **Minimum**, and **Maximum** fields show values from the grade rate for the employee's grade. The **Comparatio** field shows the salary as a percentage of the midpoint defined for the grade rate.

> **Note:** Fields are greyed out when there is no previous history, for example, if there is no previous or changed salary.

Running the Salary Review Report

Use this report to see current and past salaries, and salary proposals, for some or all of your employees. You can restrict the employees to those assigned to a selected organization, job, position, or grade. You can also restrict the report to showing only employees receiving the maximum salary for their grade (defined by the grade rate). You can use the report to show all salaries (approved and proposed) or to show unapproved salary proposals only.

You run reports from the Submit Requests window.

▶ **To run the Salary Review Report:**

1. In the Name field, select Salary Review Report.
2. Enter the Parameters field to open the Parameters window.
3. Enter the effective date for which you want to see the report.
4. Optionally select an organization, job, position, and / or grade to restrict the scope of the report to employees assigned to these components.
5. If you want to restrict the report to showing salary proposals, select Yes in the Unapproved Proposals Only field.
6. If you want to restrict the report to showing employees receiving the maximum salary for their grade (defined by the grade rate), or a higher salary, select Yes in the Grade Rate Maximum Only field.
7. Choose the Submit button.

Entering Salary Surveys

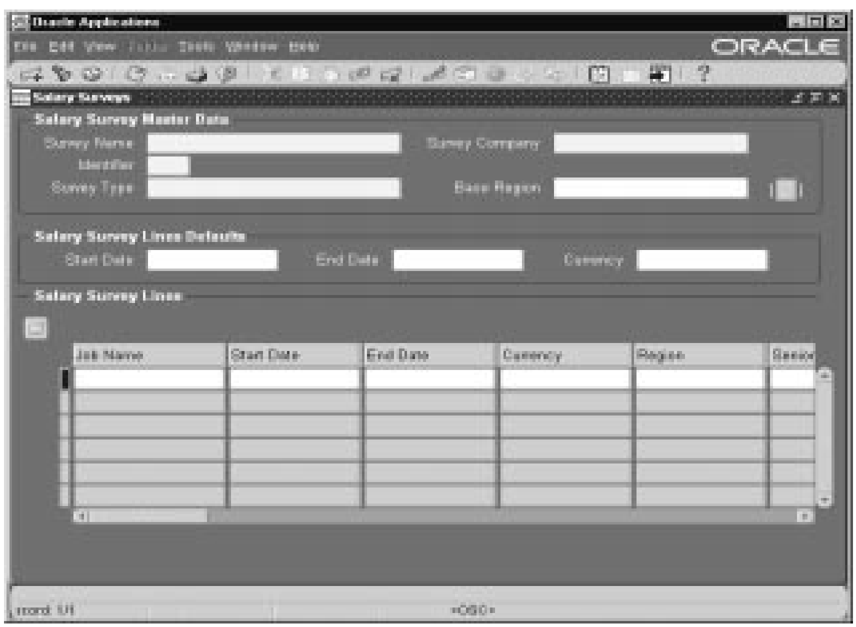
The Salary Surveys window enables you to enter salary surveys relevant to your industry. You can record as many different salary surveys as you require by setting up their unique information in the salary survey master data. Then for each survey, you can enter the survey results for each job by creating salary survey lines.

> **Note:** The area of the window where you enter the salary survey line information is a folder. Therefore, you can customize the information by renaming, resizing and re–ordering the fields displayed. You can also create your own folders to display a subset of the information.

Salary survey lines can then be linked to the jobs and positions you use in your enterprise. Using the OBIS Salary Survey report you can then compare how salaries for jobs within your enterprise compare with trends within your industry as a whole.

Before you enter your salary survey details you must know your salary survey identifier. The salary survey identifier helps you select the information relevant to the survey you are entering. See Salary Survey Identifiers: page 4 – 12.

You must enter details of your salary survey in three stages.



▶ To enter salary survey master data:

1. Enter the name of the market salary survey and the salary survey company. This information is used to uniquely identify the survey details.
2. Enter the salary survey identifier. This enables you to select only the information relevant to the current survey.
3. Enter the following master data for your survey:
   - Survey Type – enter whether the salary information is annual, monthly, hourly or period. This is based on your enterprise's salary basis.
   - Base Region – if you require, you can enter information about whether there is a regional or national average.

     Note: Once you have set up all your salary survey details, making changes to the survey type and base region information may invalidate your survey. Oracle HRMS enables you to change this information so you can correct any mistakes, however you should not change this information to update an existing survey.
4. Save your master salary survey details.

▶ To enter default dates for salary survey lines:

■ Enter the default start and end date for your salary survey lines.

These dates will be used for every salary survey line. However, you can amend the default dates when you enter the salary survey line.

▶ To enter the default currency for salary survey lines:

■ Enter the currency for your salary survey lines.

This currency will be used for every salary survey line. However, you can amend the default currency when you enter the salary survey line.

▶ To enter salary survey lines:

1. Enter a job name, start date and currency for the salary survey line. If required, enter an end date for the salary survey line.
2. Enter a definition of your salary survey lines. You can enter the:
   - Region the survey includes
   - Seniority of the survey

- Company size of the survey
- Industry of the survey
- Age of the survey

By entering a start and end date you can create a history of salary survey information. However, you must ensure that the job and salary definition information is never the same for two salary survey lines on the same date.

3. Enter the salary details for the line. You can enter details such as the minimum pay, mean pay, percentage change, and first quartile.
4. Enter all the salary survey lines you require for the salary survey.
5. Save your salary survey lines.

Mapping Salary Survey Lines

The Map Salary Survey window enables you to map salary survey lines to either jobs or positions.

> **Note:** Salary Survey lines are set up when you enter salary survey details using the Salary Surveys window. See: Entering Salary Surveys: page 4 – 32

Once you have selected the job or position you can map the salary survey lines. Choose the Define Survey Map button in the Job, or Position window.

▶ To map a salary survey line:

1. Optionally, enter the Oracle HRMS location, grade, and organization. This enables you to map your salary survey line to more specific details within your enterprise.
2. Enter the details of the salary survey line. You can select any of the salary survey lines you have set up from any of the fields.

   Note: The Map Salary Survey window is a folder. Therefore, you can customize the information by renaming, resizing and re–ordering the fields displayed. You can also create your own folders to display a subset of the salary survey information.
3. Map all the salary survey lines you require.
4. Save your mapping details.

CHAPTER

5

Absence Management and PTO Accruals

Absence Management and PTO Accruals

Flexibility is the keynote of Oracle's approach to absence management and PTO accrual plans. You set up the rules that define how you record absences, who is entitled to paid leave of each type, and how much time can be taken.

Can I define which types of absence I want to track and the units of time in which they are recorded?

Yes, you can define as many types of absence as you require, and assign them to categories for ease of reporting. You can also define reasons for absence, to provide additional reporting information. For example, the category might be "family leave," the type might be "maternity," and the reason might be "birth." Each absence type can be recorded in days or hours.

What about study leave and other absence types that are not available to all employees?

You can control which groups of staff are eligible to take absences of each type. Absences are recorded on element entries. By linking the element to organizations, jobs, grades, employment categories, or other assignment components, you control who can take each absence type.

Can I use batch entry to record absences, along with other timecard date?

Yes, you can use Batch Element Entry (BEE) to make entries of absence elements. You can record the number of days or hours absent, and any other information you have designed the element to hold (such as absence reasons).

How do absence types relate to PTO accrual plans?

Each accrual plan is associated with one absence element (and hence one absence type). Each entry of time off reduces the net accrual on the plan. You can also associate any number of other elements with a plan and determine how entries to these element affect the accrual calculation. This is useful for recording time bought or sold, or unused PTO brought into a new plan on enrollment.

What rules govern PTO accrual plans in Oracle HRMS?

A few types of accrual plan are seeded with the system. However, accrual plan rules vary from enterprise to enterprise, and country to country. Oracle HRMS provides you with the flexibility to define your own plan rules. Here is just a selection of the rules you can set up:

- The length of the accrual term (often one year), and the start date, which may be fixed (such as 1 January) or vary by employee (such as the anniversary of the employee's hire date). Some plans have no start date, but always calculate accruals for the previous 12 months (or other length of time).
- The frequency of accrual, such as monthly, or once each pay period. In other plans, employees receive their full entitlement up front, at the beginning of the accrual term.
- The amount of accrual and any ceiling on the amount that can be held. These figures may be fixed or vary by length of service, grade, time worked, or other factors.
- What happens to unused PTO at the end of the accrual term.
- Rules for part time employees, and for employees with suspended assignments
- Rules for new hires, including when they can begin accruing PTO and when they can begin to use it.

How do we track and analyze absences and net accrual entitlement?

When you enter an absence you can see, at the employee level, how much absent time of the same type has already been recorded for the employee. If the absence affects net entitlement in a PTO accrual plan, you can see current and projected entitlement figures for the plan. In another window, you can view a full absence history for an employee.

Across all employees, you can view absences of a certain type or category, within a specified time period. Using the Absences Report, you can track absences of one or more types for employees in each organization.

Employees can view their own absence history on the web using Self Service, and line managers can do the same for all the employees they manage.

Absence Management and PTO Accruals Overview

Employees take paid or unpaid time off from work for a variety of purposes, such as illness or injury, vacation, medical appointments, childbirth, death of a close relative, jury duty, labor or trade union representation and professional activities. Maintaining information on employee absences for reporting and analysis is an important aspect of human resource management.

In Oracle HRMS you can define as many absence types as you need to track employee time off, and you can group these types into categories and define absence reasons to provide further information for absence reporting.

You can reference absent time taken in payroll runs, if certain absences should affect employees' earnings or deductions. In the UK, there is government legislation regarding the payment of employees during periods of sickness and maternity leave (SSP and SMP). These requirements are handled by Oracle SSP/SMP.

PTO Accrual Plans

Many organizations permit employees to accrue hours or days of paid time off (PTO) as they work, to use for sick or vacation leave. In such enterprises, setting up and maintaining PTO plans is another part of absence management.

In Oracle HRMS you can set up any number of accrual plans, each with its own units of accrued time (hours or days) and its own rules. For example, you can set up rules for the frequency of accruals, maximum carryover to a new accrual year, accrual bands, eligibility rules for enrolling in a plan, and accrual start rules for new hires.

Key Concepts

To enable you to get the most out of the Absence Management and PTO Accruals functionality, you need to understand the following key concepts:

- Absence Categories and Types
- Absence Elements
- Absence Recording
- Accrual Plan Administration
- Accrual Plan Structure, including elements, formulas, and the net accrual calculation rules

- Accrual Start Date for New Hires, and ineligibility period rules
- Accrual Bands, for determining accrual amounts and ceilings
- PTO Carry Over Process

Absence Categories and Types

Oracle HRMS provides a convenient way to maintain information about the various absence types your enterprise recognizes. To facilitate reporting and analysis of employee absences, you can distinguish between *absence types* and *absence categories*. An absence category is a group of related absence types.

The table below illustrates examples of absence categories and types.

Absence Category	Absence Type
Medical Leave	Illness or Injury
	Work–related Injury
	Work–related Illness
	Medical Appointment
Family Leave	Paid Maternity / Paternity
	Unpaid Maternity / Paternity
	Dependent Care
Personal Leave	Compassionate Leave
	Personal Business
Professional Leave	Certification Classes
	Meeting Attendance

Example Absence Categories and Types

Also, to assist with absence reporting and analysis, you can provide *reasons* to select from when recording employees' time taken for an absence type. For example, if you need information to analyze the particular family–related responsibilities that cause employees to miss work, you can define reasons for absence types as follows:

Absence Category	Absence Type	Absence Reasons
Family Leave	Paid Maternity / Paternity	Birth of a child
		Adoption of a child
	Dependent Care	Child Care

Example Absence Category, Types and Reasons

Absence Category	Absence Type	Absence Reasons
		Elder Care
		Disabled Care

Example Absence Category, Types and Reasons

Setup of Absence Types

Setting up each absence type is essentially a two–step process. One step involves defining the type, that is, entering its name, and optionally selecting a category and reasons for it. The other step involves defining an element to associate with the type. This element serves two important purposes:

- It provides a way to *maintain a running total* of time taken for the absence type. When you record an absence for an employee, the amount of time taken goes as an entry to the input value of the element associated with the absence type.

  For example, if you record 8 hours of compassionate leave for an employee, the input value of the element for this absence type receives an entry of 8. If a second 4 hour absence of this type occurs the input value gets an entry of 4, which adds in for a total of 12 hours compassionate leave taken to date.

- It provides a way to *restrict employee eligibility* for the absence type. The links you build for the element establish which employees are eligible to use the type.

  For example, if the absence type compassionate leave is available only to full time employees, you link its element to the employment category Full Time.

To hold a single running total of time taken for two or more absence types, you associate all the types with the same absence element. For example, your absence category Personal Leave may include two absence types you need for certain reporting purposes, Compassionate Leave and Personal Business. However, you require just one running total to be kept of employees' time taken for both types of personal leave. In this case you simply associate both absence types with the same absence element.

> **Note:** If you want to use absence types without recording accrued totals or eligibility rules, you can define the type with no associated element.

Absence Elements

Each element you define and associate with an absence type has an input value with either hours or days as its unit of measure. The input value holds an *increasing balance,* that is, a running total of the hours or days an employee has taken for an absence type.

Increasing Balances of Time Taken

As you would expect, an increasing balance for an absence type starts with no time entered, and increases as you enter employees' hours or days absent. For example, if the absence type Compassionate Leave has an increasing balance, the balance starts from zero for each employee and increases by the number of hours entered for each absence of this type.

Input Value	Unit of Measure	Initial Entry
Hours	Hours in decimal format	(none)

Example Element for the Absence Type *Compassionate Leave*

Increasing balances are appropriate for most absence types. For absence types for which your enterprise sets a maximum time allowed, the system issues a message when an entry of time absent exceeds this maximum, or Oracle Alert can notify you when an employee reaches the maximum time or takes excess time.

See: *Oracle Alert User's Guide*

When defining an absence type for a PTO accrual plan, you give it an increasing balance that shows the employee's accrued time taken. When you record an absence using the Absence Detail window, you can see the amount of accrued time a plan participant has available for use as vacation or sick leave.

Decreasing Balances of Time Remaining

If your enterprise sets a maximum time allowed for an absence type that is not connected to a PTO accrual plan, you have the option of setting up a *decreasing balance* for this type, instead of an increasing balance.

For example, suppose your enterprise allows certain employees 32 hours leave per year for professional development. The Professional Leave absence element can have a decreasing balance, and an initial entry of 32 hours.

Input Value	Unit of Measure	Initial Entry
Amount	Hours in decimal format	32

Example Element for the Absence Type *Professional Leave*

If you record an employee absence of 4 hours for this absence type, the decreasing balance shows 28 hours still available to be taken.

Decreasing absence balances require more maintenance than increasing balances. They need a prorated initial balance entry for all eligible new hires throughout the year, and require resetting each year for all eligible employees.

Notice that an absence element cannot have both a decreasing and an increasing balance; it has one or the other.

Initializing an Absence Balance

Oracle HRMS provides two ways to initialize both increasing and decreasing absence balances at the year's start, and to enter initial amounts of any decreasing balances:

- The Element Entries window, for individual employees
- BEE, for batches of employees

Referencing Absent Time in Payroll Runs

You can reference absence time taken (amount of an increasing balance) or absence time remaining (amount of a decreasing balance) for absence types in formulas for earnings, deductions, or other items Oracle Payroll processes in payroll runs. For elements holding absence balances to process in payroll runs, you must set the element's termination rule to Actual Termination.

When defining the input value to hold the absence balance for an absence type's element, you can check the Database Item box. Entries to this input value then become database items that formulas for payroll calculations can access.

You can use these database items in customized reports, as well as payroll runs.

Absence Recording

When you record an absence for an employee using the Absence Detail window, you must always select an absence type. This ensures that you always have on record information about the nature of, and reasons for, the absence.

Dates and Times

In the Absence Detail window you can conveniently record for an employee either a projected, or actual start and end dates, and times of a particular type of absence, as well as the date you receive notification of the absence.

When an actual absence occurs in accordance with projected absence information already entered, you record this by simply clicking a button.

Oracle HRMS records an employee's absences using the employee's payroll calendar. This means that all employees for whom you record absence information must have a payroll component in their primary assignment.

Authorization and Replacement

When recording a projected or actual absence in the Absence Detail window, you can select both the name of an employee authorizing the absence, and of an employee replacing the absent worker.

Batch Entry of Accrued Time Taken

For fast batch entry, you can use BEE, instead of the Absence Detail window, to enter sick or vacation time recorded together with other timecard data.

Viewing and Reporting on Absence Information

For monitoring and analyzing recorded employee absences, use the:

- View Absence History window: page 5 – 45
- List Employees by Absence Type window: page 5 – 46
- Absences Report: page 5 – 47

For reviewing PTO plan participants' accrued time earned and taken, use the Accruals window: page 5 – 50.

Accrual Plan Administration

Just as elements constitute the underlying structure of absence types, so they provide the structure of accrual plans. Each accrual plan is associated with an absence element, which holds information about absences taken under the plan. There is also an element for the plan itself, which you use to enroll participants in the plan.

Enrollment

You enroll an employee in an accrual plan by entering the accrual plan element. You can only enroll employees who are eligible for the plan (that is, their assignments match the element's links). When you do the enrollment you can override the default date for calculating length of service (which is used in many accrual plans to determine the appropriate accrual amount and the start date of accruals for new hires).

Recording Accrued Time Taken

You record time taken under the accrual plan by making entries of the absence element associated with the plan.

Normally you make these entries using the Absence Detail window so you can record additional information, such as an absence reason, the name of the employee authorizing the absence, and the name of the employee replacing the absent worker. The window shows the participant's net accrual at the start of the absence and the projected accrual at the end of the accrual term.

You can also use BEE to make batch entries of hours of accrued sick or vacation time that employees have taken and noted on their timecards. Any entries you make to absence elements using BEE for an employee's primary assignment can then be viewed in the Absence Detail window. Entries made using BEE can include a reason, but the list of absence reasons available in the Absence Detail window is not automatically available here.

Viewing Accruals

You can use the Accruals window to see, at any time, how much time an employee has accrued and used under an accrual plan. You cannot change the amount accrued using this window. The gross accrual is calculated by a formula that may, for example, vary the accrual according to length of service, grade, overtime or other factors.

Recording PTO Sold or Purchased

If your enterprise pays employees for time they have accrued but not used, or if you permit employees to buy additional time, you may decide to define your own PTO–related elements to record information about these transactions. You then use the Element Entry window to enter these elements for the appropriate employees.

Running the Carry Over Process

Once each year (or other plan term), an employee's balance of unused accrued time must be cleared down ready for the new plan term. You run the PTO Carry Over process to clear down these balances and record both unused time available for carryover, and residual time unavailable for carryover.

> **Note:** Some accrual plans are based on a rolling plan term. The Carry Over Process is not relevant to this type of plan.

Accrual Plan Structure

In Oracle HRMS, accrual plans are based on elements, formulas, and a net accrual calculation. All of these are available for you to configure so you have complete control over the rules underlying your plans.

Oracle HRMS does not store gross or net accrual totals. It calculates them dynamically, by calling the Accrual formula. This formula calculates an employee's gross accrual. The net accrual calculation specifies the element entries that should add to or subtract from this figure to create the net entitlement.

The table below further explains the role of the elements, formulas, and net accrual calculation.

This aspect of an accrual plan ...	Is for ...
Absence element	Storing entries of days or hours absent.
Accrual plan element	Enrolling employees in the accrual plan; system generates the element.
Carry Over element	Storing unused time at end of plan term; system generates element; Carry Over process makes entry.
Residual element	Storing unused time that cannot be carried over at end of plan term; system generates element; Carry Over process makes entry.
Other elements	Storing other amounts of time to be included in the net accrual calculation (such as time bought and sold); you create any other elements your plan requires.
Accrual formula	Calculating gross accrual to date
Carry Over formula	Returning the maximum permitted time an employee can carry over., and the effective date and expiry date of the carry over; called by the Carry Over process.

Constituents of Accrual Plans

This aspect of an accrual plan ...	Is for ...
Ineligibility formula	Checking whether an employee is eligible to use accrued PTO on the effective date of an absence entry made by BEE (Batch Element Entry); called by BEE validation. NOTE: This formula is not required if you enter the plan's ineligibility period in the Accrual Plan window.
Net accrual calculation	Defining which element entries add to or subtract from the gross accrual to create net.

Constituents of Accrual Plans

Accrual Elements

For each accrual plan, you define and link an absence element and then define a plan using this absence element. The system generates elements for the plan.

Generated Elements

The system generates the following elements when you save a new accrual plan:

- An element representing the plan and which has the same name as the plan. You use this element to enroll participants in the plan.
- An element to hold participants' unused PTO that is available for carry over to the next year.
- An element to hold *residual PTO*, that is, unused PTO not available for carry over under plan rules.

The Carried Over and Residual elements have input values that automatically receive entries when you run the PTO Carry Over process:

- Hours or Days (depending on the plan's units)
- Effective Date
- Expiry Date (on the Carry Over element), which is the date by which the employee must use the carried over time.

Oracle HRMS automatically links these elements using the same link criteria that you created for the absence element associated with the plan. If you change the links for the absence element, you should also update the links for the three plan elements.

Other Elements

Your enterprise may require other elements to reflect individual plan policies. For example:

- Employees may be permitted to sell back PTO they have accrued but not used.
- Employees may also be permitted to purchase additional PTO in certain circumstances.
- You may need to store time in a special balance after running the Carry Over process, such as a balance of time that can be carried over for several plan terms and is not subject to the usual expiry date

- You may need an element for entering unused PTO from another plan that is being transferred to this plan on enrollment.

These policies are not standard across enterprises. So, in Oracle Human Resources you can define elements, customized to your own requirements, for entering or storing these accrual amounts.

Accrual Formulas

Most accrual plan rules are incorporated in two formulas:

- An Accrual formula, which calculates the amount of PTO accrued at any given time, and
- A Carry Over formula, which returns the maximum amount of accrued time that a plan participant can carry over to the next plan period, the date on which this carry over is effective (normally the first day of the new accrual term), and any expiry date by which the carried over PTO must be used, or forfeited.

When the Formulas Are Run

The Carry Over formula is called by the Carry Over process. When the Accrual formula is run, it always receives a calculation date as input, as shown in the following table.

Accrual formula is run when you:	Calculation date is:
Enter an absence associated with an accrual plan and open the Associated Accrual Plans window	Start date of the absence
View PTO entitlement in the Accruals window	Effective date entered in Change Effective Date window
Run the Carry Over process	Entered as a parameter

When the Accrual Formula Runs

Examples of Plan Rules

These formulas can access any data that is available as database items. For example, they can use hire date, plan enrollment date, grade, job, assignment status, employment category (full time/part time), hours worked, or pay elements to determine:

- The employee's entitlement each accrual period
- Any accrual ceiling, which is the maximum amount of PTO an employee can hold at any time, and
- The maximum amount that can be carried over to the next accrual term.

These values can be embedded in the formulas, or entered in a user table. If they vary with length of service, which is a common criterion for accrual bands, they can be entered in the Accrual Bands window when you define the accrual plan.

Some accrual plans allow new hires to accrue time from the date of their hire. Others allow accrual to begin at the start of the next accrual term, or six months after hire, or some other start date. Some plan rules incorporate a period of ineligibility, when a new employee can accrue time but not use it. Start rules such as these can be incorporated in your Accrual formulas.

> **Note:** Depending on how you define the ineligibility period, you may have to associate an Ineligibility formula with your plan, if you want to make absence entries using BEE (Batch Element Entry). See: Period of Ineligibility: page 5 – 25.

Adding Your Own Plan Rules

Some formulas are seeded. You can use these, as supplied, or use them as models to create your own, incorporating the rules required for your accrual plans.

Net Accrual Calculation

Oracle HRMS uses the following calculation for an employee's net accrual:

```
Net PTO accrual = (Accrued PTO + PTO carried over) – PTO taken to date
```

Accrued PTO is the sum of regular accruals to date in this accrual term, calculated by your Accrual formula.

PTO Carried Over is the hours or days carried over from the previous accrual term, obtained from the plan's Carried Over element.

PTO Taken To Date is all PTO taken in this accrual term, obtained from the entries to the plan's absence element.

You may require a more complex calculation of net accruals, perhaps to take some account of time stored in the residual PTO element, or to take account of time entered on other elements that you have created. In this case, you can change the calculation in the Net Calculation Rules window.

Notice that the system does no automatic processing of the entries of employees' residual PTO. Your enterprise may want to use these entries to inform employees of accrued but unused time they may forfeit, or to make payments for part or all of this time.

Seeded Accrual Type Formulas

There are three seeded formulas (of formula type Accrual) for calculating accruals. Each repeatedly calls another formula (of type Accrual Subformula), in a loop, to calculate the accrual for each accrual period. There is a Carry Over formula supplied to use with each Accrual formula. The three top level seeded Accrual formulas are:

- PTO_PAYROLL_CALCULATION
- PTO_SIMPLE MULTIPLIER
- PTO_ROLLING_ACCRUAL

Ineligibility Formula

There is also a seeded Ineligibility formula:

- PTO_INELIGIBILITY_CALCULATION

You may require an Ineligibility formula if you use BEE (Batch Element Entry) to enter absences against an accrual plan. BEE validation must ascertain whether an employee is eligible to use accrued PTO on the effective date of an absence entry in a batch line. First it checks the Accrual Plan table, so if you enter the period of ineligibility in the Accrual Plan window, you do not need to create an Ineligibility formula.

If there is no ineligibility information in this table, BEE validation checks whether there is an Ineligibility formula to call. You need an Ineligibility formula if you use BEE and you calculate the period of ineligibility within your Accrual formula, rather than entering it in the Accrual Plan window.

> **Note:** If you use the seeded formulas, you do not need an Ineligibility formula, because these formulas take the ineligibility period from the Accrual Plan table.

Description of Seeded Accrual Formulas

PTO_PAYROLL_CALCULATION

This formula calculates accruals in the same way as the accrual function in earlier releases of Oracle HRMS. This formula calls another, which is called PTO_PAYROLL_PERIOD_ACCRUAL. It is designed to be used with the Carry Over formula PTO_PAYROLL_CARRYOVER.

These formulas are based on the following rules:

- An accrual term of one calendar year, starting 1 Jan. So, accrual calculations restart at the beginning of each calendar year.

- An accrual frequency based on the participant's pay periods. So, employees on a monthly payroll accrue time each month, employees on semi–monthly payrolls accrue time twice each month, and so on. PTO accrual occurs automatically for each eligible plan participant on the last day of his or her pay period, independently of any payroll run.
- Accrual amounts and ceiling are determined by length of service.
- Carry over is always effective on 31 Dec of the plan year being processed. So, if you run the Carry Over process and specify the parameters '15 January 2000' and 'Previous' (plan year), the formula calculates the carry over for the year 1 Jan to 31 Dec 1999 and the result has the effective date 31 Dec 1999.
- Carry over expires at the end of the plan year. So carried over time with the effective date 31 Dec 1999 must be used before 31 Dec 2000.
- Maximum carryover depends on length of service bands.

PTO_SIMPLE_MULTIPLIER

This is a simple formula to provide a useful starting point for your own accrual plans. It calls another formula, called PTO_SIMPLE_PERIOD_ACCRUAL. It is designed to be used with the Carry Over formula PTO_SIMPLE_CARRYOVER.

These formulas are based on the following rules:

- An accrual term of one calendar year, starting 1 June. So, accrual calculations restart at the beginning of each June.
- An accrual frequency of one month.
- Accrual amounts and ceiling are fixed within the formula.
- Carry over is always effective on 31 May of the plan year being processed.
- Carry over expires at the end of the plan year. So carried over time with the effective date 31 May 1999 must be used before 31 May 2000.
- Maximum carry over is fixed within the formula.

PTO_ROLLING_ACCRUAL

This is an example formula for an accrual plan that does not have a fixed term start date. It calls the formula PTO_ROLLING_PERIOD_ACCRUAL. It is designed to be used with the Carry Over formula PTO_ROLLING_CARRYOVER.

These formulas are based on the following rules:

- An accrual term of one calendar year, with no fixed start date. Accruals are calculated for the previous 12 months.
- An accrual frequency of one month.
- Accrual amounts and ceiling are fixed within the formula.
- Carry over is not relevant, since the accrual term never ends, but rolls forward. Time is lost if it is not used within 12 months.

Summary of Rules in Seeded Formulas

The following tables summarize the rules incorporated in the seeded Accrual formulas.

Length of Accrual Term

PTO_PAYROLL _CALCULATION	PTO_SIMPLE _MULTIPLIER	PTO_ROLLING _ACCRUAL
One year	One year	One year

Accrual Term Start Date

PTO_PAYROLL _CALCULATION	PTO_SIMPLE _MULTIPLIER	PTO_ROLLING _ACCRUAL
1 January	1 June	No fixed date; accruals calculated for preceding 12 months

Accrual Frequency

PTO_PAYROLL _CALCULATION	PTO_SIMPLE _MULTIPLIER	PTO_ROLLING _ACCRUAL
Payroll period	Monthly	Monthly

Accrual Amount

PTO_PAYROLL _CALCULATION	PTO_SIMPLE _MULTIPLIER	PTO_ROLLING _ACCRUAL
Depends on length of service accrual bands	A fixed amount per month (2 days)	A fixed amount per month (2 days)

Accrual Ceiling

PTO_PAYROLL _CALCULATION	PTO_SIMPLE _MULTIPLIER	PTO_ROLLING _ACCRUAL
Depends on length of service accrual bands	Set within the formula to 20 days	Set within the formula to 20 days

Length of Service

PTO_PAYROLL _CALCULATION	PTO_SIMPLE _MULTIPLIER	PTO_ROLLING _ACCRUAL
Uses continuous service date (if present) or hire date. Note: continuous service date is entered using an input value on the accrual plan element.		

Accrual Start Date for New Hires

PTO_PAYROLL _CALCULATION	PTO_SIMPLE _MULTIPLIER	PTO_ROLLING _ACCRUAL
Choice of start rules on Accrual Plan form: hire date, or six months after hire date, or 01 Jan after hire date Accrual starts in the first accrual period after the chosen date (or plan enrollment date if this is later).	First accrual period after continuous service date, if this was entered for the employee. If the continuous service date was not entered, accrual starts in the first accrual period after hire date or plan enrollment date, whichever is later.	

Note: If you enter a continuous service date for the employee, the start rules are based on this date instead of hire date.

Period of Ineligibility

PTO_PAYROLL _CALCULATION	PTO_SIMPLE _MULTIPLIER	PTO_ROLLING _ACCRUAL
Accrued amounts are not credited until end of period of ineligibility (entered on Accrual Plan form), which is calculated from the hire date (or continuous service date if this was entered).		

Calculation of Gross Accrual

PTO_PAYROLL _CALCULATION	PTO_SIMPLE _MULTIPLIER	PTO_ROLLING _ACCRUAL
Sums accruals in all full pay periods of the year ending on or before the calculation date; takes account of any employee termination date, accrual start rules, ineligibility period, and accrual ceiling.	Sums accruals in all full months of the year ending on or before the calculation date; takes account of any employee termination date, ineligibility period, and accrual ceiling.	Sums accruals in the 12 months ending on or before the calculation date; takes account of any employee termination date, ineligibility period, and accrual ceiling.

Changing and Adding Rules in Formulas

If you write your own formulas (perhaps using the simple multiplier or rolling accrual formula as a basis) you can change any of these rules and add new rules as required. However, your formulas must return certain values and must check for certain conditions (such as employee termination) to avoid errors.

For information about required formula content, see: Writing Formulas for Accrual Plans, *Using Oracle FastFormula.*

For a sample accrual formula and suggestions on how to edit it to incorporate a whole range of plan rules, see: Sample Accrual Formula, *Using Oracle FastFormula.*

Accrual Start Date for New Hires

Using the seeded PTO_PAYROLL_CALCULATION formula, accrual of PTO begins on a fixed date each year (01 January). For each plan that uses this formula, you can select a value in the Accrual Start field of the Accrual Plan window. This specifies when newly hired employees start to accrue PTO. The seeded choices are:

- Hire Date
- Beginning of Calendar Year after their hire date
- Six Months after Hire Date

If you need additional start rules, you can define them as values for the Lookup Type US_ACCRUAL_START_TYPE. You must add a line to the seeded formula to calculate the accrual start date using your new start rule.

The other seeded formulas (PTO_SIMPLE_MULTIPLIER and PTO_ROLLING_ACCRUAL) do not use values in the Accrual Start field. For plans using these formulas, new hires begin accruing on their continuous service date, if this date has been entered. If there is no continuous service date, they begin accruing on their hire date or plan enrollment date, whichever is later.

If you are writing your own accrual formulas, you can choose whether to use the Accrual Start field on the Accrual Plan form to specify start rules for new hires. This is only useful if you are using the same formula for several accrual plans with different start rules. Otherwise you can specify the start rule within the formula.

Period of Ineligibility

Some accrual plans require participants to work for a period of time, perhaps three or six months, before they are eligible to use accrued PTO. They accrue time at the usual rate during this time, but it is not registered on the system until the Period of Ineligibility expires. If plan participants take vacation or sick leave during this period, the system displays a negative value for accrued time. Many enterprises set up an absence type for ”approved but unpaid leave” to use for absences taken during periods of ineligibility.

You can enter the period of ineligibility on the Accrual Plan form. The seeded Accrual formulas illustrate how a formula should use the entered values. They calculate the period of ineligibility from the continuous service date (if it was entered) or the employee’s hire date.

Alternatively, you can define the period of ineligibility within your Accrual formula.

Batch Element Entry and the Ineligibility Period

If you want to use Batch Element Entry (BEE) to make absence entries against the accrual plan, the BEE validation process must be able to check when the ineligibility period expires.

- If you record the ineligibility period for the plan on the Accrual Plan form, BEE retrieves the ineligibility period directly from the table. It interprets it as a period of time from the employee's continuous service date or hire date.
- If the period of ineligibility is defined within your Accrual formula, you must associate an Ineligibility formula with the plan. BEE calls the formula, which returns Y or N to indicate whether the employee is eligible to use accrued PTO on the date supplied by BEE. This formula should calculate the end of the ineligibility period in the same way as the Accrual formula for the plan.

If the employee is not eligible, the BEE validation process creates a warning on the batch line for the absence entry.

> **Note:** If you use a custom method of entering timecard data, calling the Element Entry API, you can add logic to call the Ineligibility formula.

How the Seeded PTO_PAYROLL_CALCULATION Formula Interprets the Start Rules

The formula calculates the appropriate start date from the employee's continuous service date (instead of hire date) if this was entered.

If the continuous service date was not entered, the formula calculates the start date from hire date and compares it with the employee's plan enrollment date. Accrual begins on whichever of these two dates is later.

For ease of reading, the following descriptions use "hire date", which should be interpreted as "hire date or continuous service date, if entered".

Start Rule: Hire Date

For plans with this rule, participants' accruals begin from the first full period following their hire date. For example, if the hire date of a participant on a semi–monthly payroll falls on the first day of either the first or second period in the month, PTO accrual starts as of that date.

If the hire date falls sometime after the first of the month but before the end of the first period, accruals start in the second period of the month. If the hire date falls after the first day of the second period but before its end, accruals start with the first period in the next month.

Start Rule: Beginning of Calendar Year

With this start rule, participants' accruals begin from the start of the year following the year in which they are hired. This means that a participant with a hire date of 1 January 1999 and another with a hire date of 31 December 1999 both start to accrue time as of 1 January 2000.

Notice that the amount of PTO each accrues may not be the same, as accrual amounts often depend on employees' length of service.

Start Rule: Six Months After Hire

For plans with this start rule, participants' accruals do not begin until the first full pay period after the six–month anniversary of their hire date. For example, someone on a semi–monthly payroll who is hired on 5 February 1996, completes six months of service on 5 August 1996, and starts to accrue PTO in the second period in August.

Notice that if people are hired on the first day of a period, their accruals begin with the pay period of the six–month anniversary of their hire date. For example, someone on a semi–monthly payroll who is hired on 1 February 1996 completes six months of service on 1 August 1996, and hence starts to accrue PTO in the first period in August.

The period of ineligibility is not applicable to plans with the start rule Six Months After Hire.

Accrual Bands

For many accrual plans, the time off that plan participants can accrue increases with their length of service, or varies by job, grade, or number of hours worked. That is, *accrual bands* determine accrual amounts. In addition, these bands can determine *ceiling* and *maximum carry over* amounts.

Ceiling rules, found in some vacation accrual plans, set a maximum amount of PTO an employee can hold at any time. When a participant's accrued PTO reaches the ceiling, no additional time accrues. Accruals begin again only after the participant uses some accrued time.

In the PTO_PAYROLL_CALCULATION seeded formula, the accrual amount, ceiling and maximum permitted carry over depend on length of service bands. Alternatively, you can use bands based on other factors, such as grade, or a combination of factors, to determine the accrual amounts for your plans.

Length of Service Bands

You set up length of service bands using the Accrual Bands window. For each band (such as 0 to 5 years of service), you can enter the accrual amount for the whole accrual term (such as an annual amount), an accrual ceiling, and the maximum permitted carry over.

Length of Service Override

In Oracle HRMS, the **first day of the month of an employee's hire date** is the default date from which his or her length of service is calculated for accrual purposes. For example, someone hired on 18 January 1997 completes one year of service on 1 January 1998, and someone hired on 31 December 1996 completes one year of service on 1 December 1997.

For individual accrual plan participants, you can override the default date from which a plan starts its length of service calculations. This is useful for managing exceptional cases that arise when, for example, employees who already have accumulated periods of service in your enterprise transfer from one place to another. You enter the date override when enrolling a participant in a plan.

Other Banding Criteria

For some accrual plans, the amount of time accrued may vary by other criteria, such as job or grade. You can create a user table to hold time accrued, ceiling rules, maximum carryover rules, and any other information you require for each job or grade. See: User–Defined Tables, *Customizing, Reporting, and System Administration in Oracle HRMS*.

Include the GET_TABLE_VALUE function in your accrual and carry over formulas for the plan to access the information held in the user table. For an example of using a user table to store banding criteria, see: Sample Accrual Formula, *Using Oracle FastFormula*.

PTO Carry Over Process

To manage the carry over of employees' unused PTO to a new accrual term, you run the PTO Carry Over process from the Submit Requests window. For accrual plans with a fixed term start date (such as 1 April), you run the process at the end of each accrual term. For accrual plans with a variable term start date (such as hire date or seniority date), you should run the process every night to update plan information for any employees whose term has ended that day.

For each participant in an accrual plan, the PTO Carry Over process first uses the Accrual formula to calculate the participant's accrued PTO as of the last day of the plan's accrual term. The process then uses the Carry Over formula to get:

- the maximum amount of time this employee can carry forward to the next accrual term
- the effective date for the carry over, and
- any expiration date by which the employee must use the time carried over, or lose it.

The process calculates the net accrual using time off recorded on the Absence element and any other elements associated with the plan. Finally, it compares the net accrual with the maximum carry over. permitted to determine both the amount to carry over, and the amount of any residual PTO that cannot be carried over.

For employees with unused, accrued time to carry over, Oracle HRMS enters this time on the plan's <plan name> Carried Over element. Similarly, for employees with unused, accrued time they cannot carry over, Oracle HRMS enters this time on the plan's Residual <plan name> element.

Setting Up Absence Management

Follow these steps to set up absence management.

▶ **To set up absence recording:**

1. Define a nonrecurring absence element, with the Termination Rule *Actual Termination* and with at least one input value, for each absence type. Link this element to define who is eligible.

   See: Defining and Linking an Absence Element: page 5 – 34

   > **Note:** Omit this step if you are setting up an absence type for which you do not need to maintain a running total of time taken or remaining, and you do not need eligibility rules.

2. Define categories of absence types as values for the Lookup Type ABSENCE_CATEGORY, and your absence reasons as values for the Lookup Type ABSENCE_REASON.

   You can select the same reason for different absence types.

   See: Adding Lookup Types and Values, *Customizing, Reporting, and System Administration in Oracle HRMS*.

3. Define each absence type, and associate it with an absence element.

   See: Defining an Absence Type: page 5 – 32

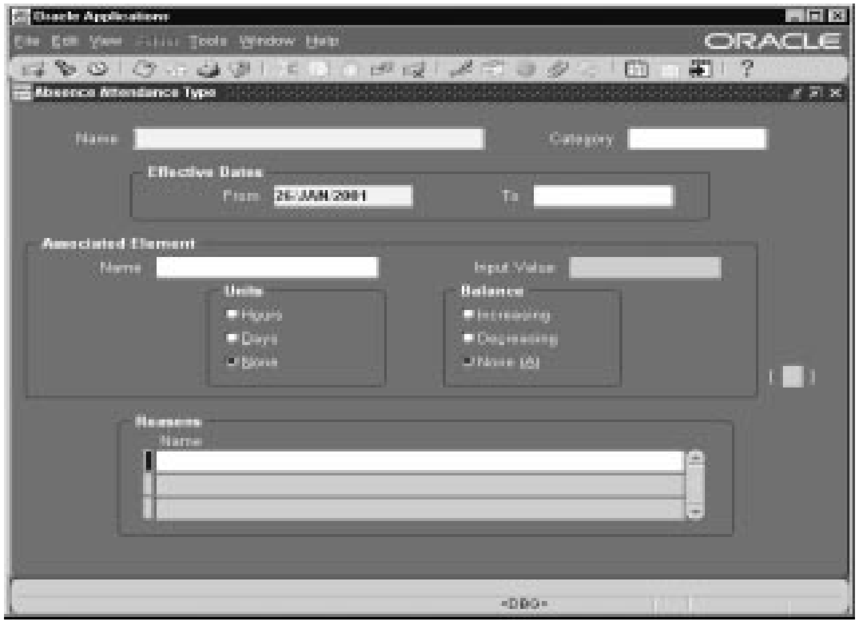
   > **Note:** To keep a single record of employees' time taken for two or more different absence types, you can associate the same element with several types.

4. For an absence type with a decreasing balance, use the Element Entries window or BEE to make initial element entries for employees eligible for the type.

   If you want to make entries for individual employees, see Making Manual Element Entries: page 2 – 24. If you want to make batch entries, see Making Batch Element Entries Using BEE: page 2 – 9.

Defining an Absence Type

Use the Absence Attendance Type window to define an absence type and associate it with an element to hold the absence balance.



▶ **To define an absence type:**

1. Enter a name and category for the absence type.

   Suggestion: Give the absence type and its associated element the same name, or coordinate the type name with its element name. For example, name the absence type for a PTO accrual plan Salaried Sick PTO Plan, and its associated element, Salaried Sick PTO Absence.

2. In the Associated Element region, select the element defined for this absence type. The name of the element's input value that holds the time taken or time remaining for this absence type appears in the Input Value field, and the unit of measure for the input value appears in the Units region.

3. In the Balance region, select *Increasing* for each entry to the absence element's input value to add to a running total of time taken to date for this absence type. Select increasing balances for absence types for PTO accrual plans, and for most other absence types.

   For absence types that have a set maximum amount of hours or days allowed, you may select *Decreasing.* In this case, each absence recorded reduces an initial balance entered for the absence type, to show time remaining to be taken for the type.

> **Note:** Decreasing balances require more maintenance. You must enter an initial balance amount for each new hire eligible for the absence type, and must initialize the balance for all eligible employees at the start of each year.

4. Optionally, select reasons that are valid for entries of this type of absence.
5. Save the absence type.

Defining and Linking an Absence Element

Define an absence element in the Element window.

▶ **To define an absence element:**

1. Set your effective date to a day on or before the start of the first payroll period for which you want to enter absences.
2. Enter a name for the element, and select the classification Information.

   Suggestion: Give the absence element and its absence type the same name, or coordinate the element name with the type name. For example, for the absence type Compassionate Leave, name the element Compassionate Leave or Compassionate Leave Absence.

3. Select the processing type Nonrecurring, and the termination rule Actual Termination.
4. Check the Multiple Entries Allowed box to enable employees to have several instances of this type of absence in a pay period.
5. If this is an absence element for a PTO accrual plan, do not select Process in Run. Uncheck this box if necessary.
6. If employees must be a certain age or have served for a certain number of years to be allowed this absence, enter this information in the Qualifying Conditions region.

   Note: If this is an absence element for a PTO accrual plan, the plan setup relates length of service to accrued time off. Do not make an entry here for length of service.

7. Save the element, then choose the Input Values button.
8. In the Input Values window, create an input value to hold the amount of time taken. Select units of Day, Hours in "HH" format, or Hours in Decimal Format (to one, two, or three decimal places).

   Attention: Absence elements for PTO accrual plans should be defined as follows: give the input value the name Hours or Days, to accord with the unit of measure of the plan. When you define the plan using the Accrual Plan window, this input value name appears in the Units field of the Absence Information region.

9. You can define minimum and maximum days or hours that can be entered in an absence record. If you do this, select what happens if these limits are breached:
   - Select Warning for the system to warn users but allow them to breach the limits.

- Select Error for the system to issue an error message and prevent users from saving an entry that breaches the limits.

10. Save your work.

▶ **To link the absence element:**

1. Set your effective date to a day on or before the start of the first payroll period for which you want to enter absences.
2. In the Element Link window, select the absence element.
3. Select eligibility criteria for this absence element. If you want to make the element available to all employees, do not select any criteria.
4. Save the link. Then define the absence type associated with this absence element.

Setting Up PTO Accrual Plans

▶ **To set up a PTO accrual plan:**

1. Define and link an element for the plan's absence type.

   See: Defining and Linking an Absence Element: page 5 – 34

   ☞ **Attention:** It is important that you link the absence element before you define the accrual plan since Oracle HRMS automatically creates links for the accrual plan elements based on your absence element links.

2. If you expect to record accrued time taken under the plan using the Absence Detail window, define an absence type for the plan, associating its absence element with this type.

   If your implementation does not use the Absence Detail window and therefore you expect to record accrued time taken using BEE or the Element Entries window, it is not essential that you define an absence type for the plan.

   See: Defining an Absence Type: page 5 – 32

3. Optionally, define new accrual start rules as values for the Lookup Type US_ACCRUAL_START_TYPE. There are three seeded categories: Hire Date, Beginning of Calendar Year and Six Months after Hire Date.

   See: Adding Lookup Types and Values, *Customizing, Reporting, and System Administration in Oracle HRMS*.

4. Decide which Accrual and Carry Over formulas to use. You can use the seeded formulas, customize them, or write your own.

   See: Writing Formulas for Accrual Plans, *Using Oracle FastFormula*.

5. If your Accrual formula defines a period of ineligibility and you want to use BEE to enter absences against the accrual plan, define an Ineligibility formula. BEE calls this formula to check whether an employee is eligible to use accrued PTO.

   See: Period of Ineligibility: page 5 – 25

   Note: If you use the seeded Accrual formulas, you do not need to define an Ineligibility formula. They use a period of ineligibility entered on the Accrual Plan form, and BEE validation can use the same value.

6. Optionally, define new accrual categories as values for the Lookup Type US_PTO_ACCRUAL. There are four seeded categories: Sick, Vacation, Balances and Home Leave.

See: Adding Lookup Types and Values, *Customizing, Reporting, and System Administration in Oracle HRMS*.

7. Define the accrual plan, selecting the formulas and absence element it is to use.

   See: Defining a PTO Accrual Plan: page 5 – 38

8. Optionally, set up length of service bands for the plan.

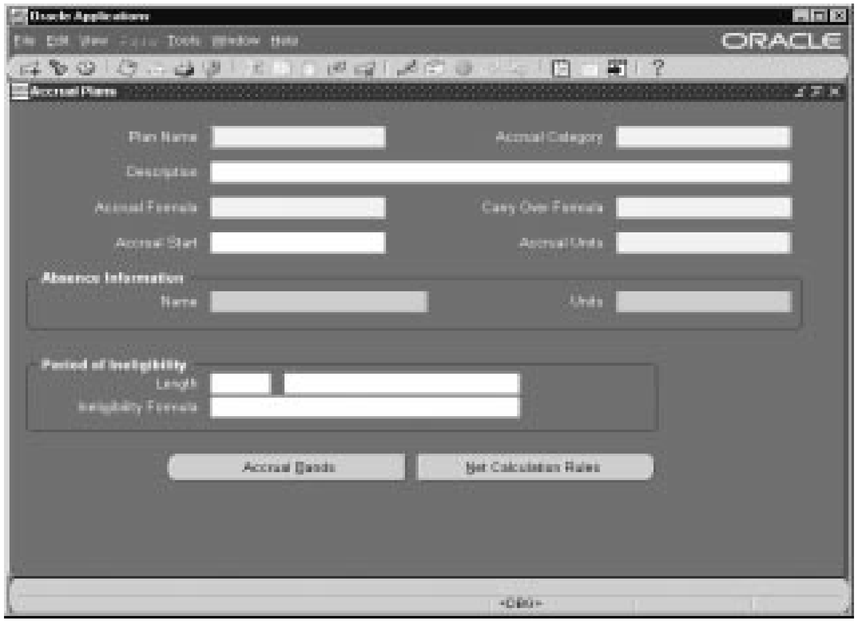
   See: Setting Up Length of Service Bands: page 5 – 40

9. Review the net calculation rules for the plan. If necessary, create additional elements and associate them with the plan by selecting them in the Net Calculation Rules window.

   See: Changing Net Accrual Calculations: page 5 – 41

Defining a PTO Accrual Plan

Use the Accrual Plans window to define an accrual plan.



▶ **To define a PTO accrual plan:**

1. Enter the plan name, and select an accrual category for it.

   Suggestion: Coordinate the names of the accrual plan, the plan's absence type if any, and the element used to record absences taken under the plan. For example, for the Hrly Vacation PTO Plan for your hourly workers, you could name the absence type and its element Hrly Vacation PTO Absence.

2. You can enter a description, summarizing the purpose and rules of the plan.

3. Select the Accrual formula and Carry Over formula to associate with the plan.

   For a description of the seeded formulas, see Seeded Accrual Type Formulas: page 5 – 20.

4. Optionally, select a start rule for the plan in the Accrual Start field. This rule determines the date on which newly hired employees begin to accrue PTO.

   Note: Some plans do not use this value; it depends which Accrual formula you have selected. Of the three seeded

Accrual formulas, only PTO_PAYROLL_CALCULATION uses this value.

5. Select Days or Hours in the Accrual Units field. This selection must accord with the input value units selected for the element that records accrued time taken under this plan.

6. In the Name field of the Absence Information region, select the element associated with the plan's absence type. The name of the element's input value that holds the entries or hours or days absent appears in the Units field.

7. If the start rule for this plan is Hire Date or Beginning of Year you can enter a period of ineligibility, during which a plan participant can accrue PTO but cannot use accrued PTO. For example, enter 3 in the Length field and select Calendar Month in the next field.

8. Optionally select an Ineligibility formula. This formula is called by the BEE validation process for a batch line that enters an absence against the accrual plan. It checks whether the employee is eligible to use accrued time on that date.

   Note: If you enter the period of ineligibility in the Length field, you do not need to select a formula. The BEE validation process gets this value and interprets it as a period of time from the employee's continuous service date.

9. Save your work.

   When you do this, the system generates three new elements for the plan, one to represent the plan and one each to hold carried over and residual amounts of accrued, unused PTO. The system creates links for these elements to match the links you defined for the plan's absence element.

10. Choose the Accrual Bands button to set up length of service bands for the plan. This is optional, but you need to set up at least one band if the plan uses the seeded PTO_PAYROLL_CALCULATION formula.

11. Choose the Net Calculation Rules button to view or change the rules for calculating employees' net PTO.

Setting Up Length of Service Bands

Use the Accrual Bands window to define length of service bands for an accrual plan.

▶ **To set up length of service bands for a PTO plan:**

1. For each length of service band applicable to this plan, establish the band's duration by making an entry in the To field. The first band starts from zero years of service. If it extends for five years, enter 5 in the To field. The system then sets the From field for the second band at 5, as the second band starts after five years of service.

   For the last band you enter, in order to cover all participants with any length of service beyond the band's From entry, enter 99 in the To field. For example, if your bands cover service of 0–5 years, 5–10 years and 10+ years, the third band's From and To entries should be 10 and 99.

2. For each band, enter in the Term Accrual field the number of hours or days that participants whose length of service falls into this band can accrue each accrual term. For example, if plan participants accrue 80 hours of vacation per year during their first five years of service (band 0 – 5), enter 80 in the Term Accrual field.

3. If a band does not permit participants to carry unused accrued time over to the next accrual term, leave the Maximum Carryover field blank. Otherwise, enter in this field the maximum number of accrued, unused hours or days that participants at this band may carry forward.

4. If a band has no ceiling that limits the total number of hours or days participants at this band can accrue at any one time, leave the Ceiling field blank. Otherwise, enter the ceiling number for the band.

5. Save your work.

Changing Net Accrual Calculations

The rules for automatic calculation of employees' net PTO appear in the Net Calculation Rules window. You enter this window by choosing the Net Calculation Rules button in the Accrual Plan window.

The default net accrual calculation takes account of absences (entered on the Absence element) and time carried over from the previous accrual term (entered by the Carry Over process on the plan's Carried Over element). If your plan's calculation needs to take account of other values (such as time bought or sold), you can change the calculation in this window.

▶ **To change the net accrual calculation:**

1. Create any additional elements you need for the plan. For example, you might need an element to store the amount of PTO an employee has bought or sold. Use the Information classification for these elements, define them as nonrecurring, and give them at least two input values:
   - An input value with the same units (days or hours) as you selected for the accrual plan, and
   - An input value with the units Date (to hold the effective date).

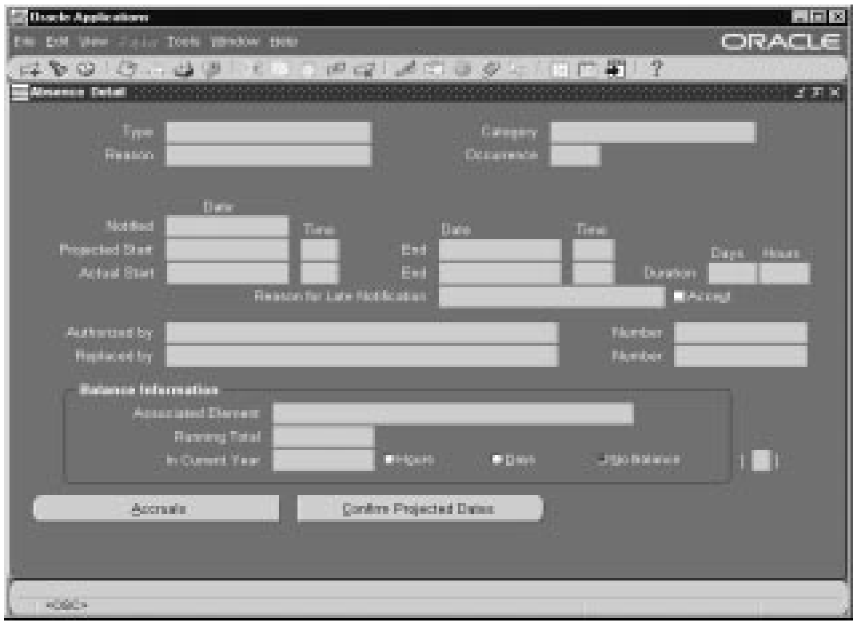
   Suggestion: Use names for these elements that clearly link them to the appropriate accrual plan. For example, if the accrual plan is called Standard Vacation, you could name the element Standard Vacation Bought or Sold.

2. Query the new elements in the Net Calculation Rules window.
3. Select the input value that hold the days or hours you want to use in the net accrual calculation.
4. Select the date input value that holds the effective date for the accrual calculation.
5. For each input value, select Add or Subtract to determine whether the value should increase or decrease the net accrual available to an employee.
6. Save your work.

Entering Absences

Enter projected or actual absences for an employee using the Absence Detail window.

Because the calendar holding absence records for an employee is the same as that of the employee's payroll, the primary assignments of employees for whom you enter absence information must include an assignment to a payroll. The effective date of this assignment must be no later than the start of the current payroll period.



▶ **To enter absences for an employee:**

1. Select the absence type. The following information appears:
   - The category of the type.
   - The occurrence of the new absence record you are entering. For example, if the employee has already incurred two absences of this type, the occurrence of the new record is 3.
   - The running total of hours or days absent for the absence type. For absence types with increasing balances, this is the number of days or hours absent already recorded (in the past or future). For any types with decreasing balances, this is the number of hours or days remaining to be taken.
   - The number of days absence recorded for the absence type in the current calendar year.

- The name of the element that maintains each employee's time taken or time remaining for this absence type.

2. Do one of the following:
   - Enter *projected* dates for the absence. You can copy these later to the Actual Date fields by choosing the Confirm Projected Dates button.
   - Enter *actual* dates and duration as days or hours, according to the units of the balance. For a duration in hours, you must enter start and end times, as well as start and end dates.
3. You can also select:
   - Reasons for the absence
   - The employee authorizing the absence
   - The employee who replaces the absent employee for the duration of the absence
4. Save your work.

Viewing Accruals for Plans Associated with the Absence Type

If the employee is enrolled in an accrual plan, the Accruals button is available. Choose this button to display the Associated Accrual Plans window, where you can see information about any accrual plans associated with the type of absence you are entering.

▶ **To view accruals:**

1. Enter or query an absence in the Absence Detail window, and choose the Accruals button.
2. If nothing is displayed, run a query in the Associated Accrual Plans window to display the name and category of any accrual plans associated with the absence type.

For each plan, three net accrual amounts are displayed:

The **Net Entitlement** figures in the Before this Absence and Including this Absence regions show the effect of the absence displayed in the Absence Detail window.

- The **Before** figure is the net accrual calculated on the day before the absence.
- The **Including** figure is calculated on the start date of the absence.

In most cases these figures will differ by the length of the absence you are entering. However, if the absence happens to start on the day that this period 's PTO entitlement is accrued, the new accrual is also shown in the After figure. Similarly, if any other time (such as time bought or sold) is debited or credited to the accrual on that day, it is reflected in the After figure.

Projected Entitlement shows the projected net accrual at the end of the current accrual plan term, taking account of any future absences already entered on the system. If the employee has future–dated assignment changes that affect his or her accrual entitlement, these are taken account of in the calculation.

> **Note:** This figure does not take account of absences with a *projected* start date. It only includes absences that have an actual start date.

Example

Suppose Ms. Shah is enrolled on a vacation plan that runs each calendar year starting 1 January, with a gross accrual of 2 days per month. Ms. Shah did not carry over any entitlement from last year and has taken no absences before May.

Net entitlement is calculated for the last complete accrual period (that is, the period that ends on or before the start of the absence being entered). This absence is only included in the calculation if it starts on the last day of an accrual period.

The following table shows the accrual amounts that would display if you enter four absences in the sequence shown.

Absences:	**2 – 4 May**	**31 May – 3 June**	**12 – 15 Aug**	**15 June**
Net Entitlement				
Before this absence	8	5	7	3
Including this absence	5	3	3	2
End of plan term	21	17	13	12

Viewing Absence History

Use the View Absence History window to view all absences for an employee.

▶ **To view absences for an employee:**

- Select an employee then choose the Find button.

  The absences appear in the lower part of the window. Use the standard Folder features to select a subset of these absence records, and to choose the fields to see.

Listing Employees by Absence Type

Use the List Employees by Absence Type window to see all the absence records for a particular absence type, or category of types.

▶ **To list employees by absence type:**

- Enter any combination of absence type, category, and start and end dates to define the absences to view. Choose the Find button.

  The absences appear in the lower part of the window. Use the standard Folder features to select a subset of these absence records, and to choose the fields to see.

Running the Absences Report

The Absences Report shows information about employee absences during a specified period. It can show absences:

- For an individual employee, or for all the employees in an organization
- For all types of absence, or for selected types

The report summarizes the information as totals for each absence type since the employee was first hired.

You run reports in the Submit Requests window.

▶ **To run the Absences Report:**

1. In the Name field, select Absences Report.
2. Enter the Parameters field to open the Parameters window.
3. Enter the effective date for which you want to see the report.
4. Select either an organization or an employee.
5. Enter the start and end dates of the period for which you want to report absences.
6. You can choose up to 10 absence types for the report. To report on all types, leave the absence type fields blank. Choose OK.
7. Choose the Submit button.

Enrolling Employees in PTO Accrual Plans

Enroll individual participants in an accrual plan by entering for them the element generated to represent the plan.

▶ **To enroll participants in a PTO accrual plan:**

■ Do one of the following:

- For enrollment of an individual employee, perhaps as a part of the hiring process, enter the element representing the plan for him or her using the Element Entries window.

  See: Making Manual Element Entries: page 2 – 24

- For enrollment of a batch of employees in a plan, perhaps a newly–developed plan, use BEE.

  See: Making Batch Element Entries Using BEE: page 2 – 9

Overriding Length of Service

The default date for calculating length of service is the first day of the month of an employee's hire date. You can override this by entering another date when you enroll the participant in the plan. This is relevant to plans that have accrual bands based on length of service.

If you enter a date here, it is also used, instead of the employee's hire date, when the seeded formulas calculate the appropriate accrual start date for the employee. For example, if the plan's start date rule is Six Months After Hire Date, accrual will begin six months after the continuous service date you enter.

▶ **To override the default date for calculating length of service:**

■ When enrolling the participant, enter the override date in the Continuous Service Date entry value of the element representing the plan.

Running the PTO Carry Over Process

The net accrual calculation for PTO includes carried over PTO in determining an employee's accrued PTO to date. To set the net calculation rules, use the Net Calculation Rules window. To review an employee's carry over of accrued time, use the Accruals window.

Run the PTO Carry Over Process at the end of the accrual term using the Submit Requests window.

▶ **To run the PTO Carry Over process:**

1. Select PTO Carry Over in the Name field. If the Parameters window does not open automatically, click in the Parameters field.
2. Enter a date in the PTO Calculation Date field and Current or Previous in the Accrual Term field. These are used by the plan's Carry Over formula to determine the effective date of the carried over PTO.

   For example, if the accrual plan uses the seeded PTO_CARRYOVER formula and you enter the calculation date 01 January 2000, the effective date of the carry over is:

   - 31 December 2000, if you select Accrual Term = Current, or
   - 31 December 1999, if you select Accrual Term = Previous
3. Select the name of one accrual plan to process, or select a category to process all plans in the category.
4. The Reprocess All Participants field defaults to No, so that the process affects only those plan participants not previously processed for this accrual term. To process all participants regardless of any previous processing, select Yes in this field.
5. When the entry of parameters is complete, choose OK. Choose Submit to submit the request.

   The Carry Over process enters the Carried Over and Residual elements for all employee assignments included in the process.

Reviewing Employees' PTO Accruals

To view information on employees' accrued PTO, use the Accruals window.

▶ **To view an employee's net PTO accrual:**

1. Set your effective date to the day for which you want to calculate PTO entitlement.
2. In the Assignments Folder, query the employee's name. Choose the Accruals button to go to the Accruals window.
3. Query the accrual plan in the Name window.

   The **Dates** region shows the dates that the accrual formula uses for the entitlement calculation. These are typically from the start of the accrual term to your effective date. The **Net Entitlement** field displays the net accrued days or hours between these dates. The **Last Accrual** date is the end of the last complete accrual period, if the formula does not calculate accrual for partial periods.

   If you allow maintenance of negative balances of accrued time at your installation and an employee's time absent exceeds time accrued, the net entitlement appears as a negative number.

   The Entitlement Details region shows the values used in the calculation of the net entitlement:

   - The <plan name> element stores current accrued time.
   - The <plan name> Carried Over element stores accrued time carried over from the previous accrual term. If the plan has an expiry date for carried over time, the value shown after the expiry date is the amount of accrued time that was used. Any remaining time was lost.
   - The absence element stores accrued time taken.
   - Any other elements created at your site to hold values used for calculating net entitlement, such as elements to store bought or sold PTO.

   If the accrual plan uses the seeded formulas, note that an absence is included in the accrued time taken figure if it starts on or before your effective date.

☞ **Attention:** When reviewing employee accruals at the end of an accrual term, remember that carried over and residual PTO appear only after the PTO Carry Over process is run.

CHAPTER

6

Earnings Types and Other Payments

Processing Earnings in Oracle Payroll

What earnings types does Oracle Payroll support?

Oracle Payroll includes the earnings types Regular Salary and Regular Wages, Overtime, Shift Pay, Group Term Life Imputed Income and Company Car.

How does the system handle jury duty or paid leave?

The regular non-worked hours functionality allows you to date effectively reduce Regular Wages for earnings types you specify according to your business rules, such as jury duty, paid holidays etc.

How does the system deal with overtime?

The earnings type Overtime produces pay for overtime worked both at straight time rates and premium rates. You may provide the rate of pay for overtime work either as an entry to the input value Rate, or as an entry in the Wage Rates table, to be located by an entry to the input value Rate Code. Otherwise, the Overtime formula itself calculates the FLSA (Fair Labor Standards Act) overtime base rate.

How does the system handle shift pay?

Employees receive earnings type Shift Pay instead of Regular Wages only when they work a shift other than their usual one. They record work on such a shift by entering a designator, such as E (Evening) or N (Night), on their timecards.

Group term life is imputed income. How does Oracle Payroll handle it?

The premiums for GTL coverage vary depending on the age of the insured person. They are maintained in the IRS Uniform Premiums table. Oracle maintains this table in Oracle HRMS with the name GTL PREMIUMS.

How does the system deal with company cars?

The imputed earnings Company Car represents the monetary value to an employee of his or her personal use of a company car. The calculation of this value occurs outside Oracle Payroll. The calculated amount is entered for the input value Imputed Amount.

Introduction to Earnings Processing in Oracle Payroll

You initiate the earnings types and non–payroll payments you need in accordance with your own compensation policies, by entering information about them in the Earnings window.

In response to your entries in this window, Oracle Payroll generates an element for the earnings or payment, with the necessary input values and balance feeds, and a formula with the necessary formula result rules.

Oracle Payroll provides the following earnings types :

- Regular Salary and Regular Wages

  This earnings type produces regular pay for salaried and hourly employees alike.

- Regular Non-Worked Hours

  This earnings type allows you to date effectively reduce Regular Wages for earnings types you specifys, such as jury duty, paid holidays etc.

- Overtime

  This earnings type produces pay for overtime worked both at straight time rates and premium rates.

- Shift Pay

  Employees receive earnings type Shift Pay instead of Regular Wages only when they work a shift other than their usual one.

- GTL Imputed Income

  This earnings type determines employee's GTL insurance coverage amount, if necessary calculating annualized salary from pay information entered in Salary Administration window.

- Company Car

  This earnings type represents the monetary value to an employee of his or her personal use of a company car.

Regular Salary and Regular Wages

Classification: Earnings

Category: Regular

Processing Type: Recurring

The earnings type Regular Salary and Regular Wages can process in the Regular run each period to produce regular pay for salaried and waged employees, respectively.

Name	Purpose of Entry
Monthly Salary	Gives amount of employee's monthly salary to formula.
Jurisdiction	Location entered here prompts system to find the location's tax code in the table of jurisdiction codes, and use this code to override the code of the employee's regular work location.

Table 6 – 1 Input Values for Regular Salary

Name	Purpose of Entry
Rate	Gives formula the rates to use. Entries here override Rate Code entries.
Rate Code	Gives formula the codes by which to locate rates in the Wage Rates table.
Jurisdiction	Location entered here prompts system to find the location's tax code in the table of jurisdiction codes, and use this code to override the code of the employee's regular work location.

Table 6 – 2 Input Values for Regular Wages

For information about the Wage Rates table, see: Predefined User Tables, *Customizing, Reporting, and System Administration in Oracle HRMS (US)*

Associated Elements

Working together with the Regular Salary and Regular Wages earnings are three additional elements, Time Entry Wages, Labor Recording and Regular Hours Worked.

Time Entry Wages Element

Classification: Earnings

Category: Regular

Processing Type: Nonrecurring

Name	Purpose of Entry
Hours	Gives hours worked to Regular Wages formula.
Rate	Overrides rate appearing on Regular Wages.
Rate Code	Overrides rate code appearing on Regular Wages.
Shift	Gives formula shift designator, for locating shift differential in the Shift Differentials table if no entry exists for Rate or Rate Code.
Date Earned	Signals that this set of entries is for a prior period, not the current period.
Jurisdiction	Location entered here prompts system to find the location's tax code in the table of jurisdiction codes, and use this code to override the code of the employee's regular work location.
Separate Check	*Yes* signals that this earnings should be paid by separate check. Default is *No.*
Deduction Processing	*Tax Only* means, process tax deductions only for this earnings. *Tax and Pre–tax Only* means, process only these deductions for this earnings. Default is *All.*

Table 6 – 3 Input Values for Time Entry Wages

For information about the Shift Differentials table, see: Predefined User Tables, *Customizing, Reporting, and System Administration in Oracle HRMS (US)*

Time Entry Wages functions to receive timecard data through the Batch Element Entry (BEE) facility. As well as hours worked, it can receive overrides to existing Regular Wages entries, and other information affecting employees' pay. For example, if day shift workers temporarily work the evening shift at a plant in another state at a special wage rate, they enter on their timecards for the week not only hours worked, but also the location and rate code or shift designator.

These entries go via BEE to the Time Entry Wages input values Hours, Jurisdiction, Shift and Rate Code. The Regular Wages formula then uses these entries, rather than entries on Regular Wages and the work location information on the employees' records, to produce correct pay for the week.

Entries to Time Entry Wages also signal to the Regular Salary and Regular Wages formulas that waged employees required to submit timecards with hours worked each period have in fact done so.

Labor Recording Element

Classification: Information

Category: Labor Hours

Processing Type: Nonrecurring

Name	Purpose of Entry
Hours	Holds entries of hours worked at a particular labor distribution or project accounting code.
Rate	Holds rate paid for the hours entered.
Rate Code	Holds rate code for the hours entered.
Shift	Gives formula shift designator, for locating shift differential in the Shift Differentials table if no entry exists for Rate or Rate Code.
Date Earned	Signals that this set of entries is for a prior period, not the current period.

Table 6 – 4 Input Values for Labor Recording

Labor Recording functions also receives entries of time worked, and optionally other information, for salaried employees who submit timecards only for project accounting or labor distribution purposes. These entries usually go in through BEE, but you can make them manually as well.

Regular Hours Worked Element

Classification: Information

C***ategory:*** Regular Hours

Processing Type: Nonrecurring

Name	Purpose of Entry
Pay Value	Receives entries of hours worked for use in reports.

Table 6 – 5 Input Values for Regular Hours Worked

Regular Hours Worked functions to receive entries of each employee's hours worked as indirect results of the Regular Salary and Regular

Wages formulas. Oracle Payroll can then access these entries for use in reports such as the Statement of Earnings and Earnings Audit.

Vacation Pay and Sick Pay

These elements should receive links to all payrolls during implementation. If you make batch entries of accrued vacation or sick time taken using BEE, these elements automatically receive entries of the time taken, which Oracle Payroll uses in reports such as the Statement of Earnings.

Processing for Regular Salary and Regular Wages

(except for final pay to terminating employees)

The formula for these earnings types does the following:

```
Checks employee's assignment to see if timecard is required.
IF timecard is not required
   Calculates salary or wages due.  Feeds results into
Regular Pay balance for the employee.
   Checks employee's work schedule or standard working hours
to locate hours worked in period.
IF timecard is required because employee is salaried but
must submit timecard with hours worked for project
accounting/labor distribution recording
   Checks whether Labor Recording element has received
entries of hours worked.
   IF no entries exist, issues message to this effect and
does not calculate pay.
   IF entries exist, enters hours and project
accounting/labor distribution codes on employee's record.
Sends hours worked to Regular Hours Worked information
element, for reports such as Statement of Earnings and
Earnings Audit.
ELSE IF timecard is required because employee must submit
hours worked on timecard to receive pay
   Checks whether Time Entry Wages element has received
current entries of hours worked from timecard.
   IF no entries exist, issues message No timecard entries
exist and does not calculate pay.
   IF entries exist, locates correct pay rate and calculates
earnings due.  Feeds results into Regular Pay balance for
the employee.  Enters hours and any other period-specific
information on employee's record.  Sends hours worked to
Regular Hours Worked element for reports such as Statement
of Earnings and Earnings Audit.
```

See Also

Structures for Initiated Earnings Types: page 6 – 18

Regular Non-Worked Hours

The regular non-worked hours functionality allows you to date effectively reduce Regular Wages for earnings types you specify according to your business rules, such as jury duty, paid holidays etc.

The effects of reducing earnings using regular non-worked hours are seen on the employees Statement of Earnings. When earnings are reduced for an earnings category such as jury duty, the SOE shows an amount and hours for the employee's regular work actually performed and an amount and hours for the regular non-worked hours.

For example, a salaried employee, paid bi-weekly, reports 16 hours of jury duty time off this pay period, the employee's SOE might look like this:

Regular Salary	64 hours	$6400
Jury Duty Pay	16 hours	$1600

Note that the sum of the hours worked ("Regular Salary") and non-worked hours ("Jury Duty Pay") equals the regular hours (80 hours, in this example).

Without noting the regular non-worked hours difference, the same employee's SOE might look like this:

Regular Salary	80 hours	$8000

☞ **Attention:** Regular non-worked hours are distinct from the predefined earnings types that are used on accruals, such as Paid Time Off. Regular non-worked hours do not require any kind of accrual plan.

Overtime

Classification: Earnings

Category: Overtime

Processing Type: Nonrecurring

The earnings type Overtime produces pay for overtime worked both at straight time rates and premium rates. You may provide the rate of pay for overtime work either as an entry to the input value Rate, or as an entry in the Wage Rates table, to be located by an entry to the input value Rate Code. Otherwise, the Overtime formula itself calculates the FLSA (Fair Labor Standards Act) overtime base rate.

See: Predefined User Tables, *Customizing, Reporting, and System Administration in Oracle HRMS (US)*

For correct calculation of the FLSA overtime base rate, when you initiate an earnings type you must identify whether to include the pay resulting from the type in the overtime base rate calculation, and whether to count hours worked for the type as FLSA hours.

☞ **Attention:** Oracle Payroll supports FLSA overtime and bonus calculation when the weekly payroll period and the overtime/bonus occur in the same work week. Payroll periods greater than a single work week are not supported at this time and manual calculations of the overtime amounts are required.

See: Identifying the Earnings or Payment: page 6 – 34

Name	**Purpose of Entry**
Pay Value	Short–circuits formula and provides Overtime earnings run result.
Hours	Gives overtime hours worked to formula.
Rate	Gives formula the rates to use. Entries here override Rate Code entries.
Rate Code	Gives formula the codes by which to locate rates in the Wage Rates table.
Multiple	Gives rate multiple for overtime hours to formula.
Date Earned	Signals that this set of entries is for a prior period, not the current period.
Jurisdiction	Location entered here prompts system to find the location's tax code in the table of jurisdiction codes, and use this code to override the code of the employee's regular work location.

Table 6 – 6 Overtime Input Values

Name	Purpose of Entry
Separate Check	*Yes* signals that this earnings should be paid by separate check. Default is *No*.
Deduction Processing	*Tax Only* means, process tax deductions only for this earnings. *Tax and Pre–tax Only* means, process only these deductions for this earnings. Default is *All*.

Table 6 – 6 Overtime Input Values

Processing for Overtime

The Overtime formula does the following:

```
Checks employee's job to see if it is exempt from overtime
payments under Fair Labor Standards Act (FLSA) rules.
IF job is exempt
Issues message Job is exempt and stops payroll processing
for the employee.
IF job is not exempt
Finds overtime rate using entry to Rate or Rate Code.
IF no entries exist
Calls function to calculate the overtime base rate.  This
function:
   1)  Determines pay this period for each earnings type
entered for employee and identified as contributing to the
overtime base rate.
For example:
```

Earnings Contributing to Overtime Base Rate	Pay Amount
Regular Hours	$600.00
Production Bonus	$200.00
Total	$800.00

Table 6 – 7

```
      2)  Determines hours worked this period for each
earnings type entered for employee and identified as
contributing to FLSA hours.

For example:
```

Earnings Contributing to FLSA Hours	Hours Worked
Regular Hours	40
TOTAL	40

Table 6 – 8

```
Formula then produces direct result Overtime Pay:
   = Overtime hours worked * overtime base rate
   or
   = Overtime hours worked * overtime base rate * Multiple.
Produces indirect result Straight Time Overtime Pay:
   = Overtime hours worked * regular rate.
```

See Also

Structures for Initiated Earnings Types: page 6 – 18

Shift Pay

Classification: Earnings

Category: Shift Pay

Processing Type: Nonrecurring

Name	Purpose of Entry
Pay Value	Short–circuits formula and provides Shift Pay run result.
Hours	Gives shift hours worked to formula.
Rate	Gives formula the rates to use. Entries here override Rate Code entries.
Rate Code	Gives formula the codes by which to locate rates in the Wage Rates table.
Shift	Gives formula shift designator, for locating shift differential in the Shift Differentials table if no entry exists for Rate or Rate Code.
Jurisdiction	Location entered here prompts system to find the location's tax code in the table of jurisdiction codes, and use this code to override the code of the employee's regular work location.
Date Earned	Signals that this set of entries is for a prior period, not the current period.

Table 6 – 9 Shift Pay Input Values

Employees receive earnings type Shift Pay instead of Regular Wages only when they work a shift other than their usual one. They record work on such a shift by entering a designator, such as E (Evening) or N (Night), on their timecards. Employees working their usual shift need not enter shift designators. They receive Regular Wages with wage rates that already include any applicable shift differential or multiplier

The Oracle HRMS Shift Differentials Table

Oracle Payroll includes this table for entry of shift differentials. For example, suppose day shift employees earn twice the day rate for the night shift, while evening shift workers earn 1.5 times their rate for night work. Workers from both shifts get three times their regular rate for the split shift. You make these entries in the Shift Differentials table:

Example Shift Differential Table Entries

	D	E	N	S
Day	10	—	20	30
Evening	—	10	15	30

Table 6 – 10 Example Shift Differential Table Entries

When a formula for an earnings locates a pay rate or a rate code for pay, it looks also for a shift designator. It uses the designator to find the correct differential for the employee in the Shift Differentials table.

See: Predefined User Tables, *Customizing, Reporting, and System Administration in Oracle HRMS (US)*

Processing for Shift Pay

The formula for Shift Pay does the following:

- Looks for rate to use to determine pay.
- If entry exists for the input Value Rate, multiplies shift hours worked by this rate to produce run result.
- If there is no entry for Rate but entry for the input value Rate Code exists, uses code to find rate in Wage Rates table. Multiplies shift hours worked by this rate to produce run result.
- If there is no entry for Rate Code, takes employee's regular rate from Regular Wages earnings. Uses shift designator to locate correct differential for regular rate in Shift Differentials table. Multiplies regular rate by differential to obtain shift rate. Multiplies shift hours worked by shift rate to produce run result.

See Also

Structures for Initiated Earnings Types: page 6 – 18

GTL Imputed Income

Classification: Imputed Earnings

Category: GTL Insurance

Processing Type: Recurring

Currently, employer–paid Group Term Life insurance premiums for insurance coverage up to $50,000 are tax–exempt. However premiums for coverage over $50,000 are taxable as imputed earnings.

The premiums for GTL coverage vary depending on the age of the insured person. They are maintained in the IRS Uniform Premiums table. Oracle maintains this table in Oracle HRMS with the name GTL PREMIUMS.

See: Predefined User Tables, *Customizing, Reporting, and System Administration in Oracle HRMS (US)*

Name	Purpose of entry
Pay Value	Short–circuits formula and provides GTL Imputed Income run result.
Coverage Multiple	Gives formula the number by which to multiply employee's annualized salary to determine GTL coverage.
Coverage Amount	Gives amount of employee's GTL coverage to formula. Overrides any entry for Coverage Multiple.
EE Contribution	Gives formula amount of employee's contribution, if any, to payments of GTL Insurance premiums.

Table 6 – 11 GTL Imputed Income Input Values

Processing for GTL Imputed Income

(except for final pay to terminating employees)

The formula for the GTL Imputed Income earnings type does the following:

```
Determines employee's GTL insurance coverage amount, if
necessary calculating annualized salary from pay information
entered in Salary Administration window. Checks if amount
exceeds $50,000.
IF no
Employee has no imputed income. No further calculations
occur.
```

```
IF yes
Calculates coverage whose premiums are net taxable imputed
income to the employee (Coverage amount – $50,000.00)
Checks employee’s age.  Locates monthly premiums by age
group per $1.000 of coverage in the table GTL PREMIUMS.
Uses premiums to calculate employee’s imputed earnings.  If
employee contributed to premium payments, reduces GTL
imputed earnings appropriately.
```

See Also

Structures for Initiated Earnings Types: page 6 – 18

Company Car

Classification: Imputed Earnings

Category: Personal Use of Company Car

Processing Type: Recurring

The imputed earnings Company Car represents the monetary value to an employee of his or her personal use of a company car. The calculation of this value occurs outside Oracle Payroll. The calculated amount is entered for the input value Imputed Amount.

Name	Purpose of Entry
Pay Value	Short–circuits formula and provides Company Car Imputed Earnings run result.
Imputed Amount	Provides the externally–calculated amount of imputed earnings for personal use of a company car.

Table 6 – 12 Company Car Input Values

Processing for Company Car

The Company Car formula does the following:

Checks whether current processing is producing final pay for a terminating employee. If so, deletes entry of Company Car for the employee as of the run date of the current processing.

See Also

Structures for Initiated Earnings Types: page 6 – 18

Structures for Initiated Earnings Types

In response to the information you enter for an earnings type or non–payroll payment in the Earnings window, the system generates the essential components of the earnings or payment. These include:

- an element whose structure includes the necessary input values and balance feeds
- a formula prescribing the correct processing for the earnings or payment, together with the formula processing and result rules.

The following sections discuss the particular input values and rules available for a generated earnings type or non-payroll payment, and the circumstances under which they are used. These input values and rules control the following:

- overrides to the **tax jurisdiction** or **date earned** of an earnings type

  See: Overrides for Tax Jurisdictions and Dates Earned: page 6 – 19

- the applicability of **supplemental tax withholding** to supplemental earnings types processed in Regular runs

  See: Supplemental Withholding in Regular Runs: page 6 – 20

- payment of an earnings type or non-payroll **payment by a separate check,** issued in addition to the usual paycheck or direct deposit payment

  See: Payments by Separate Check: page 6 – 21

- the **applicability of deductions** to an earnings or payment: all deductions, or only tax deductions, or only tax and pre-tax deductions

  See: Limits on Deductions from a Payment: page 6 – 22

- the **calculation rule** used to determine the amount of an earnings or non–payroll payment.

  See: Amount Rules for Earnings and Non-Payroll Payments: page 6 – 23

See Also

Initiating Earnings and Non–Payroll Payments: page 6 – 26

Overrides for Tax Jurisdictions and Dates Earned

You must sometimes pay employees earnings for work performed in a tax jurisdiction other than their primary work location, or for work performed in prior periods. To permit you to correctly process such earnings, the structure of all the elements Oracle Payroll generates for earnings in the classification Earnings includes these input values:

- **Jurisdiction**
- **Date Earned**

The input value Jurisdiction takes entries of locations different from employees' primary work location, when the other entries for the earnings type refers to work done at a location other than the primary location. The payroll run then finds the jurisdiction code (tax code) of the location where this work was performed in the system's table of jurisdiction codes, so it can process the earnings for this work using the correct tax information.

The input value Date Earned takes entries of the end date of a prior period, when a set of input value entries for the earnings type is for work performed in this earlier period. If the payroll run finds an entry for the Date Earned input value, it processes the earnings using the employee information, including W-4 information, in effect as of the earned date.

Input Value Name	Purpose of Entry
Jurisdiction	Provides the location for work done somewhere other than the primary work location. Entry of a location here prompts system to find the location's tax code in the table of jurisdiction codes, and use it to override the code of the employee's regular work location when calculating taxes.
Date Earned	Signals that this set of entries is for a prior period, not the current period.

Table 6 – 13 Input Values for Work Location and Period Worked

Supplemental Withholding in Regular Runs

Oracle Payroll includes two types of payroll runs, *Regular* and *Supplemental*. A payroll normally has just one Regular run each period, to produce employees' regular earnings. But it can have many Supplemental runs each period, to process supplemental earnings and final pay for terminating employees, as needed.

The default tax withholding method for Supplemental runs is *supplemental withholding*. However when these runs process final pay, they always use regular withholding for any regular earnings included in the final pay.

The default withholding method for Regular runs is *regular withholding* (Percentage or Annualized Wages withholding), but these runs can use supplemental withholding for any included supplemental earnings.

Run Type	Withholding Method	Frequency and Use
Regular	Default is regular. Can use supplemental for supplemental earnings.	Regular runs are scheduled in advance to process employees' regular and imputed earnings once each period.
Supplemental	Default is supplemental. Uses regular to process regular and imputed earnings in final pay.	Supplemental runs occur whenever necessary to process supplemental earnings, and final pay for terminating employees.

Table 6 – 14 Oracle Payroll Run Types

To identify supplemental earnings that Regular runs should process using supplemental withholding, Oracle Payroll generates all earnings types in the Supplemental Earnings classification with an input value **Tax Separately**. This input value has a default entry of No. If you change this entry to Yes for a supplemental earnings type, Regular runs use supplemental withholding when processing the earnings.

Input Values Name	Purpose of Entry
Tax Separately	Default *No* means, apply run's default withholding method. *Yes* means, always apply supplemental withholding.

Table 6 – 15 Input Value for Supplemental Withholding

Payments by Separate Check

You sometimes pay certain earnings or non-payroll payments by separate check, that is, by physically separate checks that employees receive in addition to their regular paychecks or direct deposit payments. For example, you may pay a special bonus or award, or a reimbursement for moving expenses, using a separate check.

For control of separate check payments, the elements generated for all earnings in the Earnings and Supplemental Earnings classifications, and for all payments in the classification Non–payroll Payments, include the input value **Separate Check**.

The Separate Check input value has a default entry of No, matching the default entry of Never in the Separate Check region of the Earnings window.

You can change the Separate Check input value entry back and forth between No and Yes for an earnings type or payment, using the Element Link window. For an individual employee, you can make an entry of No or Yes for this input value using Element Entries window, to stop or enable a payment by separate check.

Input Value Name	Purpose of Entry
Separate Check	*Yes* signals that this earnings should be paid by separate check. Default is *No*.

Table 6 – 16 Input Value for Payment by Separate Check

Limits on Deductions from a Payment

The payroll run usually take all deductions against an earnings type or non–payroll payment, but there can be certain circumstances under which it should take only tax deductions or only tax and pre-tax deductions. So that you can exercise control over deductions processed for a payment, Oracle Payroll generates all earnings in the Earnings and Supplemental Earnings classifications, and all payments in the classification Non-payroll Payments, with the input value Deduction Processing.

The entry in this input value defaults to All (process all deductions), as does the entry in the Deduction Processing region of the Earnings window. You can change this default for an earnings or payment element on its links using the Element Link window, or for individual employees using the Element Entries window.

Input Value Name	**Purpose of Entry**
Deduction Processing	*Tax Only* means, process tax deductions only for this separate check payment. *PreTax and Tax Only* means, process only tax and pretax deductions. Default is *All.*

Table 6 – 17 Input Value for Tax or Tax and Pre–Tax Deductions Only

Amount Rules for Earnings and Non–Payroll Payments

Oracle Payroll generates each earnings or payment element with the particular input values it needs for the rule that determines the calculation of its amount. The available calculation rules are:

- Flat Amount
- Hours x Rate, or Hours x Rate x Multiple
- Percentage of Regular Earnings

Earnings or Payments with the Rule *Flat Amount*

The structure of elements generated for earnings or non–payroll payments with this rule includes an input value **Amount**, for entry of an amount. No calculations are necessary to determine the amount of this earnings or payment.

Input Value Name	Purpose of Entry
Amount	Gives formula the earnings or payment amount.

Table 6 – 18 Input Value for Amount Rule *Flat Amount*

Earnings with the Rule *Hours x Rate*

The elements generated for earnings with this rule include the input values **Hours Worked**, **Rate Code** and **Rate.** Hours Worked holds the number of hours worked at a particular rate or rate code. An entry in the input value Rate Code signals that the rates for this earnings come from the Wage Rates table. An entry of a rate to the input value Rate overrides entry of a rate code.

The Oracle HRMS Wage Rates Table

Oracle HRMS comes with the table WAGE RATES ready to receive entries. This table has one column, named Rate. You can enter as many rows as you need to accommodate your rates. For example, you can enter rates for operating different types of equipment:

As employees operate different equipment, they record on their timecards the codes and hours worked for each. The codes and hours worked go to the input values Rate Code and Hours Worked by means of the Batch Elemet Entry (BEE) facility. The earnings formula uses the codes to locate the correct rates to use for each employee's pay calculation.

Example Wage Rate Table Entries

Code	Rate
FL (forklift)	6.80
A3 (crane A3)	8.20
A7 (crane A7)	9.00

Table 6 – 19 Wage Rates Table

Instead of using the Oracle HRMS table for wage rates, you may set up your own rates tables. Notice that if you do this, you must modify the formula generated for earnings with the Hours x Rate or Hours x Rate x Multiple rule, so that it references columns in your table.

See:

Predefined User Tables, *Customizing, Reporting, and System Administration in Oracle HRMS (US)*

Setting Up User Tables, *Customizing, Reporting, and System Administration in Oracle HRMS (US)*

Entering Table Values, *Customizing, Reporting, and System Administration in Oracle HRMS (US)*

Input Value Name	Purpose of Entry
Hours Worked	Gives formula the hours worked at each rate.
Rate Code	Gives formula the codes by which to locate rates in the Wage Rates table.
Rate	Gives formula the rates to use. Entries here override Rate Code entries.

Table 6 – 20 Input Value for Amount Rule *Hours X Rate*

Earnings with the Rule *Hours x Rate x Multiple*

You use this rule to apply an uplift, or increase, to earnings calculated by the Hours × Rate rule. These two rules are very similar, except that earnings generated with the Hours x Rate x Multiple rule include an additional input value, **Multiple**.

Here you enter a multiple for the calculation. For example, for a pay uplift of 5% above the standard, make an entry of .05 in this input value.

Input Value Name	Purpose of entry
Hours Worked	Gives formula the hours worked at each rate.
Rate Code	Gives formula the codes by which to locate rates in the Wage Rates table.
Rate	Gives formula the rates to use. Entries here override Rate Code entries.
Multiple	Gives formula the multiplier to use for the calculation.

Table 6 – 21 Input Value for Amount Rule *Hours X Rate X Multiple*

Earnings with the Rule *Percentage of Regular Earnings*

Oracle Payroll generates elements for earnings with this rule with the input value Percentage, for entry of the percentage to use in the calculation.

For a **salaried employee**, the formula for this rule locates the employee's regular monthly earnings as an entry in the Monthly Salary input value of the earnings Regular Salary.

For a **waged employee**, it calculates the regular earnings in a pay period by finding the employee's wage rate and multiplying it by the hours normally worked in a pay period. It locates the employee's usual hours worked by referencing the work schedule, or if there is none the standard working hours, for his or her assignment. It finds the wage rate by referencing, in this order:

- the employee's salary basis
- the rate code entered for the employee for the earnings Regular Wages
- the rate entered for the employee for Regular Wages.

See:

HR Organizations: Entering a Work Schedule, *Using Oracle HRMS – The Fundamentals (US)*

Business Groups and HR Organizations: Work Day Defaults, *Using Oracle HRMS – The Fundamentals (US)*

Input Value Name	Purpose of Entry
Percentage	Gives formula the percentage to use.

Table 6 – 22 Input Value for Amount Rule *Percentage*

Earnings and Non–Payroll Payments

You initiate an earnings type or non-payroll payment by entering information about it in the Earnings window. Oracle Payroll then generates the earnings or payment element with the necessary input values and balance feeds, and its formula with the necessary processing and result rules.

Note: You must *define*, not initiate, certain elements that do not process in the payroll run. This includes elements used for recording employees' time absent, and for holding information about tangible items provided to employees, such as tools or cellular phones.

See:

Defining and Linking an Absence Element: page 5 – 34

Defining an Element to Hold Information: page 1 – 40

Create Regular Non-Worked Hours

Regular non-worked hours adds functionality to earnings types you specify to reduce earnings according to your business rules. The sum of the worked hours and regular non–worked hours is equal to the regular hours.

Attention: The earnings category "Regular" cannot be used with this functionality. You must use a special earnings category.

To create regular non-worked hours, you must perform the following tasks:

- Create an earnings category for reducing regular wages

  You create earnings categories from the Lookup Values screen from the Other Definitions in the Navigator.

- Set up an earnings type to reduce regular wages

  You create regular non-worked hours through the Earnings screen.

Attention: Set an appropriate effective date before creating a regular non-worked hours earnings type.

▶ **To create an earnings category to reduce regular wages:**

1. Query US_EARNINGS in the Type field.
2. Enter a unique code for the earnings category in the Code field.
3. Enter a name for the earnings category, such as "Regular Non-Worked" in the Meanings field.

   This name will display in the list of values for the earnings category.
4. Select an appropriate access level.
5. Save the earnings category.

▶ **To create a regular non-worked hours earnings type:**

Set an appropriate effective date before creating a regular non-worked hours earnings type.

1. Identify the earnings.

Attention: The earnings classification must be either Earnings or Supplemental Earnings. The earnings classification cannot be Imputed Earnings or Non-Payroll Payments.

2. Enter calculation rules for the earnings type.

☞ **Attention:** You must select either Hours_X_Rate or Hours_X_Rate_Multiple. You cannot choose a flat amount or a percentage of regular earnings.

3. Check the Reduce Regular check box.

4. If necessary, enter rules to control payments by separate check, and to limit the deductions processed against the earnings or payment.

☞ **Attention:** Do not select frequency rules for an earning. Frequency rules should only be selected for voluntary deductions.

5. Review and if necessary, make changes to the components generated for the earnings.

☞ **Attention:** If you make mistakes when initiating an earnings or payment so that the components generated for it need correction, delete all the generated components and re–initiate the earnings.

Disable a Regular Non-Worked Hours Earnings Type

Disabling regular non-worked hours earnings type is handled from the Further Element Information descriptive flexfield in the Element Description screen.

▶ **To disable a regular non-worked hours earnings type:**

1. Query the name of the earnings category you wish to disable.
2. Click in the Further Information descriptive flexfield.
3. Change the value of the Reduce Regular field from Yes to No.

End a Regular Non-Worked Hours Earnings Type

The best way to end a regular non-worked hours earnings type is to set an effective end date. This way you will be able to keep history on this activity.

Initiate an Earnings Type

To initiate an earnings type or non–payroll payment, use the Earnings window.

▶ **To set up an earnings type or non–payroll payment:**

1. If you must add a category for the earnings or payment type you are initiating, use the application utilities Lookups window to enter additional categories for these Lookup types:
   - US_EARNINGS
   - US_SUPPLEMENTAL_EARNINGS
   - US_IMPUTED_EARNINGS
   - US_PAYMENT.

   See: Adding Lookup Types and Values, *Customizing, Reporting, and System Administration in Oracle HRMS (US)*
2. Identify the earnings or payment: page 6 – 34
3. Enter processing rules for it: page 6 – 32
4. If necessary, enter rules to control payments by separate check, and to limit the deductions processed against the earnings or payment: page 6 – 33
5. Review the components generated for the earnings or payment: page 1 – 58
6. If necessary, make modifications to the generated components: page 1 – 60

☞ **Attention:** Do not select frequency rules for an earning. Frequency rules should only be selected for voluntary deductions.

☞ **Attention:** If you make mistaken entries when initiating an earnings or payment so that the components generated for it need correction, delete all the generated components and re–initiate the earnings or payment.

Enter Processing Rules for the Earnings or Payment

▶ **To enter processing rules:**

1. Select Recurring or Nonrecurring as the processing type.

   Select Recurring if entries to the input values of this earnings type or payment, once entered for an employee, should process each period until you change them or they reach their end date. Select Nonrecurring if this earnings type or payment should process only when it receives one or more new entries in a period.

   ☞ **Attention:** Do not select frequency rules for an earning. Frequency rules should only be selected for voluntary deductions.

2. Accept or change the default priority. Its classification gives the earning or payment a default processing priority in the payroll run.

3. Check the Standard Link box only if Oracle Payroll should automatically enter the earnings or payment, with its default input value entries, for all eligible employees.

   See: Automatic Entry of Elements and Default Values: page 1 – 17

4. Choose the appropriate calculation rule. The exact formula names appearing in the list of values depend on the processing type of the earnings or payment. The basic calculation rules listed are:

   - Flat Amount, if you enter the earnings or payment amount and no calculation is necessary
   - Hours × Rate, if the amount is calculated by multiplying hours worked by a wage rate
   - Hours × Rate × Multiple, if the amount is calculated by multiplying hours worked by a wage rate and a multiplier
   - Percentage of Regular Earnings, if the amount is calculated by multiplying the regular salary or the wages by a percentage

     See: Input Values for Calculation Rules: page 6 – 23

See Also

Managing Separate Check Payments and Deduction Processing: page 6 – 33

Separate Check Payments and Limiting Deduction Processing

▶ **To set up payment by a physically separate check:**

1. Choose Yes in the Separate Check region. The default is No.

   See: Input Value for Payment by Separate Check: page 6 – 21

2. Save your work.

▶ **To limit deduction processing against earnings or payment:**

1. Make a selection in the Deduction Processing region. The default is All (all deductions process against the earnings type or payment). For only tax deductions to process, choose Tax Only. For only tax and pretax deductions to process, choose PreTax and Tax Only.

   See: Input Value to Control Deduction Processing: page 6 – 22

2. Save your work.

Identify the Earnings or Payment

▶ **To identify, classify and categorize the earnings or payment:**

1. Set the effective date early enough to handle any historical entries. You cannot enter an earnings or payment for employees before its effective start date.
2. Enter a unique name for the earnings or payment, to apply both to the earnings or payment element and formula. It must start with a letter of the alphabet, not a number or symbol. You can also supply a reporting name, a short name that appears on reports and the statement of earnings.
3. Select the correct classification and category. The classification and category of an earnings or payment help to determine the tax rules and other rules and procedures that apply to it.

   ☞ **Attention:** Do not select frequency rules for an earning. Frequency rules should only be selected for voluntary deductions.

4. If pay rates for this earnings type should be used in determining overtime base rates for the predefined earnings Overtime under Fair Labor Standards Act (FLSA) rules, check the Overtime Base box. Further, if this earnings type represents pay for hours worked that should be used in determining overtime base rates for the predefined earnings Overtime under FLSA rules, check the FLSA Hours box.

   ☞ **Attention:** Oracle Payroll supports FLSA overtime and bonus calculation when the weekly payroll period and the overtime/bonus occur in the same work week. Payroll periods greater than a single work week are not supported at this time and manual calculations of the overtime amounts are required.

   See: The Earnings Type Overtime: page 6 – 10

See Also

Entering Processing Rules for the Earnings or Payment: page 6 – 32

Managing Separate Check Payments and Deduction Processing: page 6 – 33

CHAPTER

7 Deductions

Deductions

In what way does Oracle Payroll help me manage my employees' non-tax deductions?

You initiate the non-tax deductions you need (pretax, benefit, voluntary) in accordance with your own compensation policies, by entering information about them in the Deductions window. The system then generates the components of the deduction:

- deduction start and stop rules
- frequency rules
- Series EE Bond purchase
- 401k

How does the deduction become included in a payroll run?

To use the deduction in payroll runs, you must build links, and make entries to its input values.

How does Oracle Payroll allow deductions to be withheld for specific payroll periods?

Deductions do not have to be withheld in all payroll periods, but are allowed to be withheld on specific payroll periods you determine.

How does Oracle Payroll support arrearage management?

When employee earnings are insufficient to permit the payroll run to take the full amount of a deduction, the system can hold amounts not taken in an *arrears balance*. Elements generated for deductions you mark to hold arrearage include special input values for management of arrears balances.

Introduction to Deductions Using Oracle Payroll

Oracle Payroll provides significant ability to control and administer non-tax (pretax, benefit, voluntary) deductions. Specifically, Oracle Payroll allows you to create rules to control deduction starting and stopping, frequency, and arrearage. You can administer 401(k), 403(b), and 457 deductions for your employees. You can also set rules to allow employees to purchase series EE Bonds.

Deduction Start and Stop Rules

Oracle Payroll allows yout to control starting and stopping deductions in a variety of ways:

- Start Rule: On Entry

  Deduction begin for an employee as of the effective date they are entered for him or her. Similarly, they end on the effective date they are deleted for the employee.

- Start Rule: Chained

  Deductions start for an employee on the date when another deduction stops for the employee.

  The formula for a deduction with this rule checks to see whether the prior deduction has stopped for employees with entries of this deduction. When it finds that the prior deduction has stopped, it starts the chained deduction.

- Start Rule: Earnings Threshold

  Deductions with this rule start for an employee when a balance of earnings for the employee reaches a specified amount.

  The formula for deductions with this rule checks whether the payroll run has caused the employee's year–to–date value of the Gross Earnings balance to reach or surpass the threshold amount. You can modify the generated formula to reference a different balance.

- Stop Rule: Total Reached

  Deductions with this rule stop for an employee when a balance of the amount taken for the deduction reaches a specified amount.

Start and Stop Rules for the Deduction

The elements Oracle Payroll generates for initiated deductions include input values needed for particular start and stop rules. Available start and stop rules are:

Start or Stop Rule	Input Value Name	Purpose of Entry
On Entry start and stop rule	On Entry	N / A
Chained start rule	Chained to	Gives formula the deduction whose stop triggers this deduction's start

Table 7 – 1 Input Values for Deduction Start and Stop Rules (Page 1 of 2)

Start or Stop Rule	Input Value Name	Purpose of Entry
Earnings Threshold start rule	Threshold Amount	Gives formula the amount that triggers deduction's start. (Formula references Gross Earnings balance.)
Total Reached stop rule	Total Owed	Gives formula the total amount that triggers deduction's stop.

Table 7 – 1 Input Values for Deduction Start and Stop Rules (Page 2 of 2)

Frequency Rules Selection for the Deduction

Recurring deductions that process only in Regular runs may require one or more *frequency rules*. A frequency rule determines the period the deduction processes in, when its processing frequency differs from the pay frequency of employees subject to it.

For example, suppose a deduction should process just once a month for employees on weekly, bi-weekly and semi-monthly payrolls. The deduction should process in the third period of the month for the Weekly–paid employees, and the second period each month for those employees paid bi–weekly and semi–monthly.

You need a frequency rule for each payroll, to specify which period in a month the deduction processes for that payroll.

You can change a deduction's frequency rules at any time.

Annual and Semiannual Frequencies

It is possible set frequency rules to process a once– or twice–yearly deduction on monthly, quarterly or semiannual payrolls. These rules' periods then refer to periods within a year (months, quarters or half–years) instead of periods within a month.

However, to have better control over an infrequent deduction you can make it nonrecurring, and use the BEE facility to give it entries when it should process.

Series EE Bond Deductions

For deductions taken to purchase Series EE bonds, the system–generated element includes the input value **Purchase Price**, for entering of the purchase price of the bonds.

The Series EE Bond deduction formula sends the amount deducted for a bond purchase to a special balance, whose name is the deduction name with the words Towards Bond Purchase appended (for example, Series EE Bond 50 Towards Bond Purchase).

When an amount sufficient to cover one or more bond purchases accumulates in this balance, the formula issues a message to this effect and subtracts the bond purchase price from the Toward Bond Purchase balance amount. The bond purchasing process is external to Oracle Payroll.

When employees terminate, calculation of their final payments includes a refund of any amounts accumulated toward bond purchase.

Input Value Name	Purpose of Entry
Purchase Price	Gives formula the amount needed for a bond purchase.

Table 7 – 2 Input Value for Series EE Bond Deductions

See Also

Selecting Processing Rules for the Deduction: page 7 – 15

Setting Up Benefit Tables

Deductions taken to pay for medical, dental or other benefit plans have the amount rule Benefits Table, so that the payroll run goes to the Oracle HRMS Benefits Table for the amounts of these deductions. After initiating a deduction with the Benefits Table amount rule, set up the benefit plan in Benefits Table by entering in this table:

- the plan's available coverage levels
- the default employee and employer contributions at each level.

To make these entries, use the Benefit Contributions window.

Prerequisites

❑ Before setting up a benefit plan with coverage levels in the Benefit Contributions window, you must first define a deduction with the amount rule Benefits Table, for contributions taken to pay for the plan. These may be employee contributions, employer contributions, or both.

Notice that the deduction for a benefit plan with coverage levels requires both a primary classification and a benefits classification.

❑ Oracle HRMS includes these coverage levels for a benefit plan:

- Employee Only
- Employee and Spouse
- Employee and Children
- Employee and Family

If you need additional coverage levels, use the application utilities Lookups window to add them for the Lookup Type US_BENEFIT_COVERAGE.

Information entered in the Benefit Contributions window goes into the Oracle HRMS Benefits table, for the system to access when you enroll an employee in the plan.

Arrearage Rules for the Deduction

These input values are special in that they function without you ever seeing them or making entries to them. They receive their entries automatically during the payroll run.

The special input value *Not Taken* holds any amount not taken for the deduction in the most recent payroll run. The special input value *Arrears Contribution* feeds the arrears balance.

Input Value Name	Purpose of Entry
Not Taken	Receives any amount not taken in the most recent payroll run.
Arrears Contribution	Receives results of the calculation of Scheduled Amount minus Pay Value for most recent run. Feeds this result to the arrears balance.

Table 7 – 3 Special Input Values Generated for Arrears Management

The system also makes use of the special input value *Adjust Arrears* in managing arrearage.

To review an employee's arrears balance for a deduction, use the View Earnings and Deductions Balances window.

Deferred Compensation Plans and Tax–Sheltered Annuities

Eligible employees may elect to participate in a deferred compensation plan (e.g., 401(k), 457) or contribute to a tax–sheltered annuity (e.g., 403(b)) rather than receive the full amount of their salary in cash.

Participation in a deferred compensation plan is usually a pre–tax contribution that reduces the employee's taxable income. The maximum amount of salary that an employee may elect to defer and have contributed to a plan is subject to change yearly. In addition to pre-tax contributions, employees may make after–tax contributions once the plan's contribution limit has been reached. Employers may contribute *matching* amounts (the employer's matching contribution does not have to equal the employee's contribution).

The money contributed and money earned through interest are not subject to federal (nor most state) income tax until they are withdrawn.

Once you create and save your deduction, Oracle Payroll automatically generates both the pre- and post-tax deduction elements (if applicable). Oracle Payroll requires you to link and enter values for these elements separately.

Deferred compensation elements and links only need to be created once for your organization. Individual deferred compensation values must be entered and maintained for each individual assignment as dictated by your benefit elections policy.

403(b) and 457 Catch–Up Provisions

Oracle Payroll supports deferred compensation plans with catch–up provisions (e.g., 403(b) and 457).

By enabling the appropriate catch–up provision, Oracle Payroll will automatically adjust an eligible employee's maximum pre–tax contribution limit. You can then adjust the employee's 403(b) or 457 deduction accordingly.

Decisions for Deductions

After initiation of a deduction, you can make certain modifications to the generated components so that they better meet your requirements. It is always best to make such modifications before using the deduction.

See: Modifying an Element Generated for Payroll Processing: page 1 – 59

To use the deduction in payroll runs, you must build links, and make entries to its input values.

All generated deductions include the input values Additional Amount and Replacement Amount, for efficient management of one-time changes to the deduction amount.

Setting Up Payroll Tables

When a deduction's formula finds the deduction amounts in a payroll table, these amounts most commonly vary with employees' ages, pay or job class. This example payroll table holds union dues amounts that vary with employee pay:

Salary Range	Union A	Union B
5.00 – 7.50	10.00	12.00
7.51 – 10.00	15.00	18.00
10.01 – 15.00	20.00	23.00

Table 7 – 4 Example Payroll table where Rows Represent Pay

Oracle HRMS includes the *row types* Age Range, Salary Range and Job Class, already set up and ready for use for payroll tables holding deduction amounts.

For payroll tables whose rows do not reference employee age, pay or job class, you set up the additional row types you require. The new row type may reference information already in the HRMS database as a database item. For example, a new row type can reference employees' positions.

Alternatively, the new type may reference information not previously existing in the database. For example, instead of referring to pay ranges, the rows of a table holding amounts of union dues deductions can refer to union-defined skill levels not found elsewhere in your HRMS database:

Skill Level	Union A	Union B
Apprentice	10.00	12.00
Journeyman	15.00	18.00
Craftsman	20.00	23.00

Table 7 – 5 Example Payroll Table where Rows do not Represent Pay, Age or Job

The procedure for setting up a new row type varies depending on whether the row references a database item or not. If the row references a database item, you use the application utilities Lookups window. If it does not reference a database item, you first use the Lookup Types window and then the application utilities Lookups window.

Deduction Examples

Arrears

The table below presents an example of how the entries automatically made to the arrears input values work to maintain the arrears balance.

Scheduled deduction amount per run: $50

Pay Value = Amount actually deducted in each run

Run	Pay Value	Not Taken	Arrears Contribution	Arrears Balance
1	50	0	0	0
2	30	20	20	20
3	10	40	40	60
4	110	0	–60	0
5	50	0	0	0

Table 7 – 6 Arrears Management Example

Identify the Deduction

You need to identify, classify and categorize a deduction before you can use it.

▶ **To identify, classify and categorize the deduction:**

1. Set the effective date early enough to handle any historical entries. You cannot enter a deduction for employees before its effective start date.
2. Enter a unique name for the deduction. This name applies both to the deduction element and its formula. It must start with a letter of the alphabet, not a number or symbol. You can also supply a reporting name, a short name that appears on reports and the statement of earnings.
3. Select the correct classification for the deduction, and a category if applicable.

   Pretax deductions (classification Pre-Tax Deductions) and deductions taken for wage attachments (classification Wage Attachments) require selection of a category.
4. If this deduction pays for a benefit or benefit plan, select the appropriate benefit classification for it.

   See: Benefits Administration Overview: page 3 – 4

See Also

Selecting Processing Rules for the Deduction: page 7 – 15

Setting Frequency Rules for the Deduction: page 7 – 17

Determining the Deduction Amount: page 7 – 18

Selecting Arrearage Rules for the Deduction: page 7 – 9

Reviewing the Deduction: page 1 – 57

Modifying an Element Generated for Payroll Processing: page 1 – 59

Select Processing Rules for the Deduction

Processing rules allow you to tailor the deduction to meet your business needs.

▶ **To enter processing rules for the deduction:**

1. Choose the Processing tabbed region of the Deduction window.
2. Select Recurring or Nonrecurring as the processing type.

   Select Recurring if entries to this deduction should process until you change or end them. Select Nonrecurring if the deduction should process only when it receives one or more new entries in a period.

   All deductions for Series EE Bond purchase require the processing type Recurring.
3. If this is a deduction for the purchase of Series EE Bonds, check the Series EE Bond box.
4. Accept or change the default priority. The deduction's classification gives it a default processing priority in the payroll run.
5. Check the Standard Link box only if you want automatic entry of the deduction and its default input value entries for all eligible employees.

   See: Automatic Entry of Elements and Default Values: page 1 – 17
6. Select a run type of Regular or All.

   Select Regular for the deduction to process only in Regular runs, that is, the runs that produce employees' regular pay in each period. Select All to process the deduction in both Regular and Supplemental runs.
7. Select On Entry, Chained, or Earnings Threshold as the rule determining when this deduction starts for an employee:
   - On Entry if the deduction should start as of the effective date you enter it for an employee
   - Chained if this deduction should start up for an employee at the point when another deduction stops. Enter the name of the prior deduction in the input value Chained To.
   - Earnings Threshold if this deduction should start when the employee's Gross Earnings balance reaches or surpasses a threshold amount. Enter this amount in the input value Threshold Amount.

You can modify the deduction formula to reference a different earnings balance.

See: Deduction Start and Stop Rules: page 7 – 4

8. Select On Entry or Total Reached as the rule determining when this deduction stops for an employee:
   - On Entry if the deduction should stop as of the effective date you delete it for an employee
   - Total Reached if the deduction should stop when the sum of amounts taken from an employee reaches a specified total. You enter this total in the input value Total Owed.

   See: Deduction Start and Stop Rules: page 7 – 4

See Also

Identifying the Deduction: page 7 – 14

Setting Frequency Rules for the Deduction: page 7 – 17

Determining the Deduction Amount: page 7 – 18

Selecting Arrearage Rules for the Deduction: page 7 – 9

Reviewing the Deduction: page 1 – 57

Modifying an Element Generated for Payroll Processing: page 1 – 59

Set Frequency Rules for the Deduction

A frequency rule determines the period the deduction processes in, when its processing frequency differs from the pay frequency of employees subject to it. Frequency rules should not be set for involuntary deductions.

▶ **To enter frequency rules for the deduction:**

1. Choose the Frequency Rules button.
2. Select the names of the payrolls for which you are setting frequency rules.
3. Check the boxes for the processing period or periods in which the deduction should process for each payroll.

   For example, if you want a monthly deduction to process in the second week of the month for a weekly payroll, check the box under 2 for that payroll.

   See: Deduction Frequency Rules: page 7 – 6

Valid Processing Periods

Notice that some of the periods appearing in the window are not available for some payrolls. For example, periods 4 and 5 are not applicable to payrolls with bi–weekly or semi–monthly periods, because these payrolls can have at most only three periods a month.

See Also

Identifying the Deduction: page 7 – 14

Selecting Processing Rules for the Deduction: page 7 – 15

Determining the Deduction Amount: page 7 – 18

Selecting Arrearage Rules for the Deduction: page 7 – 9

Reviewing the Deduction: page 1 – 57

Modifying an Element Generated for Payroll Processing: page 1 – 59

Determine the Deduction Amount

Determining the deduction amount is is controlled by rules:

- Flat Amount, if you enter an amount at the employee level from the Element Entry window for the deduction.
- % Earnings, if you enter a percentage at the employee level from the Element Entry window for the deduction formula.
- Payroll Table, if the amount comes from a previously created table.
- Benefits Table, if the amount comes from the Oracle HRMS Benefits Table. For example, medical, dental and vision benefit plans, the Benefits Table holds the available coverage levels and contribution amounts for each level.

▶ **To determine the deduction amount:**

1. Choose the Amount Details tabbed region.
2. Select Flat Amount, % Earnings, Payroll Table or Benefits Table as the amount rule.
3. If the amount rule is Payroll Table, select in the Payroll Table region the name and row type of the table. Also, select the name of the table column in which the deduction formula should look for the deduction amounts.

   Note: The payroll table rows may have a row type other than Age Range, Salary Range or Job Class. In this case, after setting up this deduction you must modify its generated formula to reference the row type and the appropriate database item. The formula has the name of the deduction with the words PAYROLL_TABLE added.

   See:

   Setting Up Row Types for Payroll Tables: page 7 – 11

   Setting Up User Tables, *Customizing, Reporting, and System Administration in Oracle HRMS (US)*
4. If the amount rule is Benefits Table, complete the deduction setup by setting up the appropriate benefit plan in the Benefits Table, using the Benefit Contributions window. First save your deduction in this window.

   See: Setting Up Benefit Plans for Health Care Coverage: page 7 – 8

See Also

Identifying the Deduction: page 7 – 14

Selecting Processing Rules for the Deduction: page 7 – 15

Setting Frequency Rules for the Deduction: page 7 – 17

Selecting Arrearage Rules for the Deduction: page 7 – 9

Reviewing the Deduction: page 1 – 57

Modifying an Element Generated for Payroll Processing: page 1 – 59

Manage Insufficient Funds (Arrearage)

Arreage rules allow you to manage insufficient funds.

▶ **To manage insufficient funds:**

1. Check the Arrearage box to hold an arrears balance for the deduction. The arrears balance takes the deduction's name. If you do not check this box, no arrears balance is held for this deduction.
2. Check the Partial Deduction box to take a partial amount when earnings are insufficient to take the full deduction amount.

   If you check this box but do not check the Arrearage box, the system does not hold an amount not taken in an arrears balance.

See Also

Identifying the Deduction: page 7 – 14

Selecting Processing Rules for the Deduction: page 7 – 15

Setting Frequency Rules for the Deduction: page 7 – 17

Determining the Deduction Amount: page 7 – 18

Modifying an Element Generated for Payroll Processing: page 1 – 59

Reviewing Earnings and Deductions Balances: page 1 – 10

Establish Deductions

After creating a deduction, you create a relationship between the deduction and an employee record.

▶ **To establish deductions on an employee's record:**

1. Query the deduction and open the Entry Values window.
2. Select the correct deduction amount for the employee.

   Note: For a benefit plan, after you enroll an employee by entering a coverage level, the plan deduction's input values Employer and Employee Contributions automatically receive entries of the default contribution amounts entered for the level in the Benefits Table. Optionally, you can overwrite these defaults for individual employees.

   Note: To enroll many employees in a benefit plan, use the BEE batch entry facility.

   See: Making Non–Payroll Batch Entries Using BEE: page 2 – 5

3. Select a processing priority, if desired.

Change Deductions

You can change the deduction amount or other detail for an employee.

▶ **To change deductions on an employee's record:**

1. Open the Entry Values window for the employee's deduction.
2. Update the deduction amount, or other details for the employee.
3. Save the updated deduction information.

End Deductions

If a deduction was created erroneously, you can quickly end it.

▶ **To end deductions on an employees record:**

1. Query the deduction and open the Entry Values window.
2. Select delete record.
3. Respond appropriately to the prompt to Purge or effectively End Date the deduction.

   Note: If the deduction contains a year-to-date balance, you cannot purge the record.

4. Save your changes.

Set Up Payroll Tables

When a deduction's formula finds the deduction amounts in a payroll table, these amounts most commonly vary with employees' ages, pay or job class.

▶ **To set up row types that reference database items:**

1. In the application utilities Lookups window, and query the Lookup type US_TABLE_ROW_TYPES in the Type field.
2. Enter a suitable short code for the new row type, and the meaning of the code. For example, if the new row type references employees' positions, you could enter the code POS and the meaning Position.
3. Optionally, enter a description for the new row type. The start date defaults to the effective date. You can change this default. Save your work.

▶ **To set up row types that do not reference database items:**

1. In the Lookup Types window, enter an appropriate Lookup type for the new row type. For example, to set up a row type for the table holding union dues deduction amounts that vary by employees' union–defined skill levels, set up a Lookup type SKILL_LEVEL.
2. Save your work.
3. Navigate to the application utilities Lookups window, query the new Lookup type in the Type field, and enter a short code and meaning for each code belonging to the type.

   These are example Lookup entries for the Lookup type SKILL_LEVEL:

Code	**Meaning**
APP	Apprentice
JRN	Journeyman
CRFT	Craftsman

Table 7 – 7

4. Optionally, enter a description for the new row type. The start date defaults to the effective date. You can change this default.

5. Save your work.

6. Clear the entries in the application utilities Lookups window, and query the Lookup type US_TABLE_ROW_TYPES in the Type field. Then add the new Lookup type to the list of codes and meanings available as Lookups for the type US_TABLE_ROW_TYPE.

   Note: After setting up a deduction whose amount comes from the table using the new row type, you must use the Formulas window to modify the formula generated for the deduction so that it references the new row type. The formula has the name of the deduction with the words PAYROLL_TABLE added.

Set Up Benefit Tables

Deductions taken to pay for medical, dental or other benefit plans have the amount rule Benefits Table, so that the payroll run goes to the Oracle HRMS Benefits Table for the amounts of these deductions.

▶ **To set up benefit coverage levels and contribution amounts:**

1. Query the benefit plan in the Benefit Contributions window
2. Select the coverage levels available for the benefit plan.
3. For each level, enter an employee and an employer contribution amount.

   Note: Enter a contribution amount of zero when a plan has no contribution from the employer and/or from the employee.
4. Save your work.
5. Query the benefit plan from the Element window,
6. Click in the Further Information field to open the Further Element Information window.
7. Select a period in the Period Type field to identify the frequency with which the contributions entered in the Benefit Contributions window are paid.

   Note: Many contributions for health care plans are paid monthly. In this case, select Calendar Month as the period type.

Creating 401(k), 403(b), and 457 Elements

401(k), 403(b), and 457 elements are created in the Deduction window.

▶ **To create a 401(k), 403(b) or 457 element:**

1. Enter a unique name for the element in the Name field. Enter a short name in the Reporting Name field, if desired.

   The Name applies to both the deduction element and its formula. It must start with a letter of the alphabet, not a number or a symbol. The Reporting Name is a short name (less than 12 characters) that appears on reports and the statement of earnings.

2. Select Pre-Tax Deductions from the List of Values in the Classification field. Select the appropriate category in the Category field. Select the appropriate classification in the Benefit Classification field.

3. Verify that the tabbed region is set to Processing. Make sure Recurring is selected in the Type region. Make the appropriate selection in the Run Type region:

   - **Regular**, the deduction will process only in runs that produce an employee's regular pay in each period.
   - **All**, the deduction will process in both Regular and Supplemental runs.

4. Accept or change the default value in the Priority field. Make sure that the Standard Link checkbox remains unchecked.

   The deduction's classification gives it a default processing priority in the payroll run. Elements with lower processing priorities process first.

5. Check the appropriate boxes in the Deferred Comp Rule Region:

   - **Employer Match** indicates that an ER Match element will be linked to employees who are eligible for employer matching (or partial matching). This element has the same name as the element you are creating, plus the letters ER.
   - **After Tax Component** indicates that an AT element will be linked to employees that elect to contribute after tax money. This element has the same name as the element you are creating, plus the letters AT.

6. Verify that On Entry is selected in both the Start Rule region and the Stop Rule region.

   Selecting On Entry in these two regions will cause the deduction to start on the effective date you enter it for the employee and stop on the effective date that you delete it for the employee.

7. Check the Frequency Rules Exist checkbox, and click the Frequency Rules button to enter the appropriate information (if necessary).

   See: Selecting Frequency Rules for the Deduction: *Oracle Payroll User's Guide*

8. Verify that the Series EE Bond checkbox is unchecked. Make sure the PayMIX Entry Allowed checkbox is checked. This will enable the deduction to receive entries through PayMIX.

   Note: If you uncheck box, but later decide to allow PayMIX entries for this deduction, you can use the Further Information portion of the Element window to select a PayMIX category.

9. Select the Amount tabbed region. Use the Rules region to select the appropriate amount Rule (If an AT element exists, these rules will apply to it as well):

   - **Flat Amount**, Select this if you want to deduct a fixed amount of money each pay period. You define this amount from the Element Entries Window for each employee.
   - **%Earnings**, Select this if you want to deduct a percentage of the employee's earnings each pay period. You define this amount from the Element Entries Window for each employee.

   Note: Payroll Table and Benefits Table are not desirable selections for 401(k), 403(b), or 457 deductions.

10. Make the appropriate selection in the Insufficient Funds region.

    - **Arrearage**, Select this if you want Oracle Payroll to hold the deduction in an arrears balance. The arrears balance takes the deduction's name.
    - **Partial Deduction**, Select this if you want Oracle Payroll to take a partial amount when earnings are insufficient to take the full deduction amount.

    See: Selecting Arrearage Rules for the Deduction: *Oracle Payroll User's Guide*

11. Save your work.

Oracle Payroll generates the 401(k), 403(b) and 457 elements (this process may take as long as 5 minutes). If you checked the After Tax Component checkbox in the Deferred Comp Rule region, a separate after tax element is created. This element will have the same name as the Pre-Tax element, but will be followed by the letters AT (After Tax). If you checked Employer Match, a separate element is created. This element will have the same name as the original element, but will be followed by the letters ER.

Linking 401(k), 403(b), and 457 Deductions to Assignments

401(k), 403(b), and 457 deduction elements need to be linked to specific assignments. Linking is the process of defining which assignments are eligible for the deduction element. You must link the deduction element before you can define the deduction for each employee. You will have to repeat this procedure for each deduction element that you are going to use. For example, if you have a 401(k), 403(b), or a 457 deduction with both pre-tax and after-tax elements, you will have to complete this procedure twice: once for the pre-tax element, and once for the after-tax element.

See: Defining Element Links: *Oracle Payroll User's Guide*

You link 401(k), 403(b), and 457 elements in the Element Link window.

Prerequisite

- You must create the deduction element before you can link it.

▶ To Link a 401(k), 403(b), or 457 Deduction Element

1. Select the name of the element that you are linking from the List of Values in the Element Name field.

   Note: You named the element when you created it in the deduction window. If you created an after tax 401(k), 403(b), or 457 element, it has the same name as the pre-tax element followed by the letters AT (after tax).

2. Make the appropriate selections to define which assignments are eligible for the deduction in the Eligibility Criteria region.

   For example, if you select Fulltime-Regular in the Employment Category field, only employees that have been designated as Fulltime–Regular will be eligible for the deduction.

   Note: Leave the Payroll field blank and check the Link to all Payrolls box if you want employees assigned to *any* payroll to be eligible. This rule excludes employees with no payroll assignment.

3. Select the Costable Type in the Costing tabbed region. If you accept the default (*Not Costed*), Oracle Payroll maintains no costing information for the deduction element. Make any necessary entries into the Qualifying Conditions alternative region, and the Miscellaneous alternative region.

   > **Note:** If you are going to maintain costing information on employer contribution (ER) elements, you must create a link for the element and enter the appropriate information into the Costing alternative region. ER elements do not need to be

linked to assignments unless you wish to maintain costing information for them.

See: Defining Element Links: *Oracle Payroll User's Guide*

4. Save your work.

The 401(k), 403(b), or 457 deduction element is now linked to all existing eligible assignments. When you create a new eligible assignment, Oracle Payroll will update the link automatically.

Entering, Changing, and Ending an Employee's 401(k), 403(b), or 457 Deduction

To enter, change, or delete an individual employee's 401(k), 403(b), or 457 deduction, use the Element Entries window.

Prerequisite

- The 401(k), 403(b), or 457 deduction element must be linked to the employee's assignment before you can enter, change, or delete deduction amounts.

▶ **To enter a 401(k), 403(b), or 457 deduction on an employee's record:**

1. Select the appropriate element from the List of Values in the Element Name field, . Click the Entry Values button.

   Note: 401(k), 403(b), and 457 elements for after-tax contributions have the same name as their pre-tax counterparts, followed by the letters AT (after-tax).

2. Enter the deduction amount in either the Amount field, or the Percentage field.

   Only one of these two fields appears in the Entry Values window. The appearance of these fields is controlled from the Deduction window.

3. If you are entering a deduction amount for an after-tax element, select either Yes or No in the Take OverLimit AT field. This field does not appear for pre-tax elements.

   If you select Yes in the Take OverLimit AT field, Oracle Payroll will automatically make after-tax deductions once the employee has reached the federal pre-tax limit.

4. Select a processing priority, if desired.
5. Save your work.

▶ **To change a 401(k), 403(b), or 457 deduction on an employee's record:**

- See using catch up limits

1. Query for the appropriate deduction in the Element Name field. Click the Entry Values button.
2. Update the deduction amount, or percentage for the employee.
3. Save the updated information.

▶ **To end 401(k), 403(b), or 457 deductions on an employee's record:**

1. Query for the appropriate deferred compensation deduction in the Element Name field. Click the Entry Values button.

2. Select Delete Record.
3. Respond appropriately to the prompt to Purge or effectively End Date the deduction.
4. Save your changes.

Establishing Employer Matching for 401(k), 403(b), and 457

Oracle Payroll allows you to set up employer matching for your organization. The system default is for every dollar that an employee contributes up to 6% of their pay, the employer will match 50 cents. This criteria can be adjusted, or employer matching can be removed altogether.

You establish Employer matching from the Globals window.

Prerequisite

- The appropriate deduction element must be linked to the employee's assignment before you can enter amounts into the Globals window.

▶ To set up employer matching

1. Enter the limit of the employer match in the Value field for the EMPLOYER_MATCH_LIMIT variable.

   This is a decimal value that represents what percentage of the employees total pre-tax contribution will be matched by the company. The default entry for this field is .06 (up to 6% of an employee's total contribution).

2. Enter the rate of the employer match in the Value field for the EMPLOYER_MATCH_PCT variable.

   This is a decimal value that represents what percentage of each contributed dollar is matched. The default entry for this field is .5 (50% of the amount an employee contributes).

3. Save your work.

Using 403(b) and 457 Catch-Up Provisions

403(b) and 457 catch–up provisions allow eligible employees to exceed a plan's maximum pre–tax deferral limit.

To amend an individual employee's 403(b) or 457 deduction with a catch–up provision, use the Element Entries window.

Prerequisite

- The 403(b) or 457 deduction element must be linked to the employee's assignment before you can use the catch–up provision.

▶ To amend a 403(b) deduction to use the catch–up provision:

1. Query for the appropriate deduction in the Element Name field. Click the Entry Values button.
2. Select the appropriate catch–up element from the List of Values in the Catchup Type field.
3. Click Update or Correction when prompted.
4. Save the updated information.

After you have amended the deduction to use the catch–up provision, you will be able to change the 403(b) deduction accordingly.

▶ To amend a 457 deduction to use the catch–up provision:

1. Query for the appropriate deduction in the Element Name field. Click the Entry Values button.
2. Click in the Catchup Type field to select the 457 Catchup limit.
3. Click Update or Correction when prompted.
4. Save the updated information.

After you have amended the deduction to use the catch–up provision, you will be able to change the 457 deduction accordingly.

See Also

Entering, Changing, and Ending an Employee's 401(k), 403(b), or 457 Deduction: page 7 – 31

APPENDIX

A

Default Menus and Reports

This appendix includes information about:

- Windows and their navigation paths
- Reports and process in Oracle HRMS

Windows and their Navigation Paths

The following list shows the default navigation paths for all the windows in Oracle HRMS for the US, as they are supplied. You can use taskflow windows directly from the menu, or from the People and Assignment windows.

The responsibility that you use determines which of these windows you can use and how you access them. Your system administrator sets up navigation menus and task flows for your responsibility. They may also create customized versions of some of these windows using different window titles.

AAP Organization

1. Choose Work Structures –> Organization –> Description in the Navigator.
2. Enter or query an AAP Organization.
3. Choose the Others button and select AAP Organization.

Absence Detail

Do one of the following:

1. Choose People –> Enter and Maintain in the Navigator.
2. Choose the Others button and select Absence.

Or:

1. Choose Fastpath –> Absence in the Navigator.
2. In the resulting Find window, query the person.

Absence Attendance Type

- Choose Total Compensation –> Basic –> Absence Types in the Navigator.

Accrual Bands

1. Choose Total Compensation –> Basic –> Accrual Plans in the Navigator.
2. Enter or query an accrual plan name.
3. Choose the Accrual Bands button.

Accrual Plans

■ Choose Total Compensation –> Basic –> Accrual Plans in the Navigator.

Accruals

Do one of the following:

1. Choose View –> Employee Accruals in the Navigator.
2. Run a query in the Assignments Folder window.
3. Select an employee assignment and choose the Accruals button.

Or:

1. Choose Fastpath –> Accruals in the Navigator.
2. In the resulting Find window, query the person.

Action Types

1. Choose Total Compensation –> Programs and Plans –> Plan Enrollment Requirements in the Navigator.
2. Query or enter a plan.
3. Choose the Actions button.

Actvity Rate

1. Choose Total Compensation –> Rates / Coverage Definitions –> Flex Credits in the Navigator.
2. Query a compensation object.
3. Choose the Activity Rate button.

Activity Variable Rates and Rules

1. Choose Total Compensation –> Rates / Coverage Definitions –> Flex Credits in the Navigator.
2. Query a compensation object.
3. Choose the Variable Rates button.

Actual Premiums

■ Choose Total Compensation –> General Definitions –> Rate / Coverage Definitions –> Actual Premiums in the Navigator.

Address

Do one of the following:

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Address button.

Or:

1. Choose Fastpath –> Address in the Navigator.
2. In the resulting Find window, query the person.

Adjust Balance (Payroll only)

Do one of the following:

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Adjust Balance.

Or:

1. Choose Fastpath –> Adjust Balances in the Navigator.
2. In the resulting Find window, query the person.

Adjust Tax Balances (Payroll only)

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Adjust Tax Balances.

Advanced Criteria

1. Choose Benefits Extract –> Criteria Definition in the Navigator.
2. Query or enter a criteria definition and choose the Advanced tab.
3. Select a Criteria Type and choose the Details button.

Alter Effective Date

- Choose Tools –> Alter Effective Date from the Tools menu.

Applicant Entry

- Choose Recruitment –> Applicant Quick Entry in the Navigator.

Applicant Interview

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an applicant.
3. Choose the Others button and select Application.
4. Choose the Interview button.

Application

Do one of the following:

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an applicant.
3. Choose the Others button and select Application.

Or:

1. Choose Fastpath –> Application in the Navigator.
2. In the resulting Find window, query the person.

Application Utilities Lookups

1. Choose Other Definitions –> Lookup Tables in the Navigator.
2. Enter or query a user–defined Type.

Appraisal Template

- Choose Career Management –> Appraisal Template in the Navigator.

Assessment Template

- Choose Career Management –> Assessment Template in the Navigator.

Assign Security Profiles

- Choose Security –> Assign Security Profiles in the Navigator.

Assignment

Do one of the following:

1. Choose People –> Enter and Maintain in the Navigator.

2. Enter or query an employee.
3. Choose the Assignment button.

Or:

1. Choose Fastpath –> Assignment in the Navigator.
2. In the resulting Find window, query the person.

Assignment Budget Values

Do one of the following:

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an applicant or an employee.
3. Do one of the following:

   For an applicant:

   - Choose the Others button and select Application.
   - Choose the Budgets button.

   For an employee:

   - Choose the Assignment button.
   - Choose the Others button and select Budget Values.

Or:

1. Choose Fastpath –> Assignment Budget in the Navigator.
2. In the resulting Find window, query the person.

Assignment Criteria

1. Choose Payroll –> Assignment Set in the Navigator.
2. Enter or query an assignment set.
3. Choose the Criteria button.

Assignment History

■ Choose View –> Histories –> Employee Assignment in the Navigator.

Assignment Processes

1. Choose View –> Payroll Process Results in the Navigator.
2. Enter or query a payroll process.

3. Choose the Assignment Process button.

Assignment Set

- Choose Payroll –> Assignment Set in the Navigator.

Assignment Statuses

- Choose Work Structures –> Status in the Navigator.

Assignment Folder

- Choose View –> Lists –> Assignment Folder in the Navigator.

Authentication Activities (Advanced Benefits Only)

- Choose Total Compensation –> General Definitions –> Authentication Activities in the Navigator.

Balance (Payroll only)

- Choose Total Compensation –> Basic –> Balance in the Navigator.

Balance Classifications (Payroll only)

1. Choose Total Compensation –> Basic –> Balance in the Navigator.
2. Enter or query a balance.
3. Choose the Classifications button.

Balance Dimensions (Payroll only)

1. Choose Total Compensation –> Basic –> Balance in the Navigator.
2. Enter or query a balance.
3. Choose the Dimensions button.

Balance Feed Control (Payroll only)

1. Choose Total Compensation –> Basic –> Element Description in the Navigator.
2. Enter or query an element.
3. Choose the Balance Feed Control button.

Balance Feeds (Payroll only)

Note: This instance of the Balance Feeds window lets you select more than one balance for the element to feed.

1. Choose Total Compensation –> Basic –> Element Description in the Navigator.
2. Enter or query an element.
3. Choose the Balance Feeds button.

Batch Header

- Choose Mass Information eXchange: MIX –> Batch Element Entry in the Navigator.

Batch Process Parameters (Advanced Benefits only)

- Choose Processes and Reports –> Batch Process Parameters in the Navigator.

Batch Summary

- Choose Mass Information eXchange: MIX –> BEE Summary in the Navigator.

Beneficiaries

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button and select Contact.
4. Choose the Entries button.
5. Select the element representing the benefit for which you are entering a beneficiary.
6. Choose the Others button and select Beneficiary.

Beneficiary Certifications

1. Choose Total Compensation –> Programs and Plans –> Plan Enrollment Requirements in the Navigator.
2. Query a plan.
3. Choose the Designations tab.
4. Choose the Beneficiary tab.
5. Choose the Certifications button.

Benefits Authentication Form (Advanced Benefits only)

- Choose People –> Total Comp Contribution –> Benefits Authentication Form in the Navigator.

Benefits Balances

- Choose Total Compensation –> General Definitions –> Additional Setup –> Benefits Balances in the Navigator.

Benefit Contributions

- Choose Total Compensation –> Basic –> Benefit Contributions in the Navigator.

Benefits Group

- Choose Total Compensation –> General Definitions –> Eligibility / Rate Factors –> Benefits Group in the Navigator.

Benefits Pools (Advanced Benefits only)

- Choose Total Compensation –> General Definitions –> Rate / Coverage Definitions –> Benefits Pools in the Navigator.

Benefits Authentication Form (Advanced Benefits only)

- Choose People –> Total Comp Contribution –> Benefits Authentication Form in the Navigator.

Benefits Service Center (Advanced Benefits Only)

- Choose People –> Benefits Service Center in the Navigator.

Book Events

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button and select Bookings.

Budget

- Choose Work Structures –> Budget in the Navigator.

Budget Value Defaults

1. Choose Work Structures –> Organization –> Description in the Navigator.
2. Enter or query a Business Group.
3. Choose the Others button and select Budget Value Defaults.

Budgetary Calendar

- Choose Work Structures –> Budget Calendar in the Navigator.

Business Group Information

1. Choose Work Structures –> Organization –> Description in the Navigator.
2. Enter or query a Business Group.
3. Choose the Others button and select Business Group Information.

Career Path Names

- Choose Work Structures –> Job –> Path Name in the Navigator.

Certifications

1. Choose Total Compensation –> Programs and Plans –> Plan Enrollment Requirements in the Navigator.
2. Query or enter a plan.
3. Choose the General tab.
4. Choose the Plan or Option tab.
5. Choose the Certifications button.

Change Event Log

1. Choose Benefits Extract –> Change Event Log in the Navigator.

Cities

- Choose Other Definitions –> Cities in the Navigator.

City Tax Rules <Employee>

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Chose the Tax Information button.
4. Choose the Tax information button from the Federal Tax Rules <Employee> window.
5. Choose the Tax information button from the State Tax Rules <Employee> window.
6. Choose the Tax information button from the County Tax Rules <Employee> window.

COBRA Benefits (Basic Benefits)

1. Choose People –> Enter and Maintain in the Navigator.

2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select COBRA.
5. Enter or query a qualifying event.
6. Choose the Benefits button.

COBRA Coverage (Basic Benefits)

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select COBRA.

COBRA Payments (Basic Benefits)

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select COBRA.
5. Enter or query a qualifying event.
6. Choose the Payments button.

COBRA Statuses (Basic Benefits)

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select COBRA.
5. Enter or query a qualifying event.
6. Choose the Statuses button.

Collective Agreements

- Choose Work Structures –> Collective Agreements in the Navigator.

Columns

1. Choose Other Definitions –> Table Structure in the Navigator.
2. Enter or query a table.

3. Choose the Columns button.

Communication Delivery Methods

- Choose Fastpath –> Personal Delivery Method in the Navigator.

Communication Types (Advanced Benefits only)

- Choose Total Compensation –> General Definitions –> Additional Setup –> Communication Types in the Navigator.

CommunicationType Children

1. Choose Total Compensation –> General Definitions –> Additional Setup –> Communication Types in the Navigator.
2. Query a communication type kit.
3. Choose the View Children button.

Comminication Type Delivery Methods

1. Choose Total Compensation –> General Definitions –> Additional Setup –> Communication Types in the Navigator.
2. Query or enter a communication type.
3. Choose the Delivery button.

Communication Type Triggers

1. Choose Total Compensation –> General Definitions –> Additional Setup –> Communication Types in the Navigator.
2. Query or enter a communication type.
3. Choose the Triggers button.

Communication Type Usages

1. Choose Total Compensation –> General Definitions –> Additional Setup –> Communication Types in the Navigator.
2. Query or enter a communication type.
3. Choose the Usages button.

Competence Profile

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Others button and select Competence Profile.

Competence Requirements

- Choose Career Management –> Competence Requirements in the Navigator.

Competence Types

- Choose Career Management –> Competence Types in the Navigator.

Competencies

- Choose Career Management –> Competencies in the Navigator.

Consolidation Sets (Payroll only)

- Choose Payroll –> Consolidation in the Navigator.

Contacts

Do one of the following:

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button and select Contact.

Or:

1. Choose Fastpath –> Contact in the Navigator.
2. In the resulting Find window, query the person.

Do one of the following:

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button.
4. Choose Contracts.

Or:

1. Choose Fastpath –> Contracts in the Navigator.
2. In the resulting Find window, query the person.

Contribution History (Def Comp 457)

- Choose View –> Histories –>Entries –>Contribution History

1. Choose Mass Information eXchange: MIX –> Batch Element Entry in the Navigator.

2. Choose the Totals button.

Conversion Rate Types

- Choose Payroll –> Currency Types in the Navigator.

Costing

Do one of the following:

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Costing.

Or:

1. Choose Fastpath –> Costing in the Navigator.
2. In the resulting Find window, query the person.

Costing Information

1. Choose Work Structures –> Organization –> Description in the Navigator.
2. Enter or query an organization.
3. Choose the Others button and select Costing.

County Tax Rules <Employee>

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Chose the Tax Information button.
4. Choose the Tax information button from the Federal Tax Rules <Employee> window.
5. Choose the Tax information button from the State Tax Rules <Employee> window.

Court Orders

- Choose People –> Total Comp Enrollment –> Court Orders in the Navigator.

Coverage Across Plan Types

- Choose Total Compensation –> Rates / Coverage Definitions –> Coverage Across Plan Types in the Navigator.

Coverage Calculations

- Choose Total Compensation –> General Definitions –> Rate / Coverage Definitions –> Coverage Calculations in the Navigator.

Covered Dependents

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button and select Contact.
4. Chose the Entries button.
5. Select the element representing the benefit for which you are entering a dependent.
6. Choose the Others button and select Dependents.

Criteria Definition

- Choose Benefits Extract –> Criteria Definition in the Navigator.

Custom Reports

- Choose Processes and Reports –> Submit Custom Reports in the Navigator.

Database Items

1. Choose Total Compensation –> Basic –> Write Formulas in the Navigator.
2. Enter or query a formula.
3. Choose the Show Items button.

DateTrack History Change Field Summary

- Choose Tools –> DateTrack History from the Tools menu.

Deduction (Payroll only)

- Choose Total Compensation –> Basic –> Deductions in the Navigator.

Define Combinations

- Choose Total Compensation –> Programs and Plans –> Combinations in the Navigator.

Define Extract

- Choose Benefits Extract –> Extract Definition in the Navigator.

Define Function

- Choose Other Definitions –> Formula Functions in the Navigator.

Define QuickPaint Report

- Choose Processes and Reports –> Define a QuickPaint Report in the Navigator.

Define Task Flow

- Choose Security –> Task Flow Definitions in the Navigator.

Define Task Flow Nodes

- Choose Security –> Task Flow Nodes in the Navigator.

Delete Person

- Choose People –> Delete Personal Records in the Navigator.

Dependent/Beneficiary Designation (Advanced Benefits Only)

- Choose People –> Total Comp Enrollment –> Dependent/Beneficiary Designation in the Navigator.

Dependent Certifications

Do one of the following:

1. Choose Total Compensation –> Programs and Plans –> Program Enrollment Requirements in the Navigator.
2. Query a program.
3. Choose the Dependent Coverage tabbed region
4. Choose the Certifications button.

Or:

1. Choose Total Compensation –> Programs and Plans –> Plan Enrollment Requirements in the Navigator.
2. Query a plan.

3. Choose the Designations tab.
4. Choose the Dependent tab.
5. Choose the Certifications button.

Dependent Change of Life Event

Do one of the following:

1. Choose Choose Total Compensation –> Programs and Plans –> Program Enrollment Requirements in the Navigator.
2. Query a program and choose the Dependent Coverage tabbed region.
3. Choose the Dependent Change of Life Event button.

Or:

1. Choose Choose Total Compensation –> Programs and Plans –> Plan Enrollment Requirements in the Navigator.
2. Query a plan and choose the Designations tabbed region.
3. Choose the Dependent tab.
4. Choose the Dependent Change of Life Event button.

Dependent Change of Life Event Certification

Do one of the following:

1. Choose Choose Total Compensation –> Programs and Plans –> Program Enrollment Requirements in the Navigator.
2. Query a program and choose the Dependent Coverage tabbed region.
3. Choose the Dependent Change of Life Event button.
4. Select a life event and choose the Dependent Change of Life Event Certifications button.

Or:

1. Choose Choose Total Compensation –> Programs and Plans –> Plan Enrollment Requirements in the Navigator.
2. Query a plan and choose the Designations tabbed region.
3. Choose the Dependent tab.
4. Choose the Dependent Change of Life Event button.

5. Select a life event and choose the Dependent Change of Life Event Certifications button.

Dependent Coverage Eligibility Profiles

- Choose Total Compensation –> General Definitions –> Eligibility Profiles –> Dependent Coverage in the Navigator.

Dependent Eligibility Profiles

Do one of the following:

1. Choose Choose Total Compensation –> Programs and Plans –> Program Enrollment Requirements in the Navigator.
2. Query a program and choose the Dependent Coverage tabbed region.
3. Choose the Eligibility Profiles button.

Or:

1. Choose Choose Total Compensation –> Programs and Plans –> Plan Enrollment Requirements in the Navigator.
2. Query a plan and choose the Designations tabbed region.
3. Choose the Dependent tab.
4. Choose the Eligibility Profiles button.

Derived Factors

- Choose Total Compensation –> General Definitions –> Eligibility / Rate Factors –> Derived Factors in the Navigator.

Designation Requirements

Do one of the following:

1. Choose Total Compensation –> Programs and Plans –> Options in the Navigator.
2. Query or enter an option.
3. Choose the Designation Requirements button.

Or:

1. Choose Total Compensation –> Programs and Plans –> Plan Enrollment Requirements in the Navigator.
2. Query a plan.
3. Choose the General tab.

4. Choose the Plan or Option tab.
5. Choose the Designations button.

Earnings (Payroll only)

- Choose Total Compensation –> Basic –> Earnings in the Navigator.

Edit Formula

1. Choose Total Compensation –> Basic –> Write Formulas in the Navigator.
2. Enter or query a formula.
3. Choose the Edit button.

EEO–1 Filing

1. Choose Work Structures –> Organization –> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select EEO–1 Filing.

Electable Choices

1. Choose People –> Total Comp Participation
2. Choose the Enrollment Opportunities button
3. Choose the Electable Choices button.

Element

- Choose Total Compensation –> Basic –> Element Description in the Navigator.

Element and Distribution Set

- Choose Payroll –> Element Set in the Navigator.

Element Classifications (Payroll only)

- Choose Total Compensation –> Basic –> Classification in the Navigator.

Element Entries

Do one of the following:

1. Choose People –> Enter and Maintain in the Navigator.

2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Entries button.

Or:

1. Choose Fastpath –> Entries in the Navigator.
2. In the resulting Find window, query the person.

Element Link

- Choose Total Compensation –> Basic –> Link in the Navigator.

Eligibility

Do one of the following:

1. Choose Total Compensation –> Programs and Plans –> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Plan Eligibility button.
4. Choose the Eligibility button.

Or:

1. Choose Total Compensation –> Programs and Plans –> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Options button.
4. Choose the Option Eligibility button.
5. Choose the Eligibility button.

Or:

1. Choose Total Compensation –> Programs and Plans –> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plans and Plan Types button.
4. Choose the Plans tab or the Plan Types tab.
5. Choose the Participation Eligibility button.
6. Choose the Eligibility button.

Or:

1. Choose Total Compensation –> Programs and Plans –> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Participation Eligibility button.
4. Choose the Eligibility button.

Employee Assignment Processes

- Choose View –> Assignment Process Results in the Navigator.

Employee Review

Do one of the following:

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Reviews.

Or:

1. Choose Fastpath –> Employee Review in the Navigator.
2. In the resulting Find window, query the person.

Employee Run Result History (Payroll only)

- Choose View –> Histories –> Run Results in the Navigator.

Employer Identification

1. Choose Work Structures –> Organization –> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select Employer Identification

End Application

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button and select End Application.

Or:

1. Choose Fastpath –> End Application in the Navigator.
2. In the resulting Find window, query the person.

End Employment

Do one of the following:

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button and select End Employment.

Or:

1. Choose Fastpath –> End Employment in the Navigator.
2. In the resulting Find window, query the person.

Enrollment Action (Advanced Benefits only)

- Choose Total Compensation –> General Definitions –> Additional Setup –> Enrollment Action in the Navigator.

Enrollment Opportunities

1. Choose People –> Total Comp Participation
2. Choose the Enrollment Opportunities button.

Enrollment Override

- Choose People –> Total Comp Enrollment –> Enrollment Override in the Navigator.

Enrollment Rules

1. Choose Total Compensation –> Programs and Plans –> Plan Enrollment Requirements in the Navigator.
2. Query or enter a plan.
3. Choose the Timing tab.
4. Choose the Scheduled tab or the Life Event tab.
5. Choose the Enrollment Rules button.

Entry Values

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Entries button.
5. Select an entry and choose the Entry Values button.

Establishment EEO–1 Filing

1. Choose Work Structures –> Organization –> Description in the Navigator.
2. Enter or query a Reporting Establishment.
3. Choose the Others button and select Establishment EEO–1 Filing.

Establishment VETS–100 Filing

1. Choose Work Structures –> Organization –> Description in the Navigator.
2. Enter or query a Reporting Establishment.
3. Choose the Others button and select Establishment VETS–100 Filing.

Event Bookings

Do one of the following:

- Choose People –> Events and Bookings in the Navigator.

Or:

1. Choose Fastpath –> Event in the Navigator.
2. In the resulting Find window, query the person.

Exemption Rules (Payroll only)

- Choose View –> Wage Attachments–> Exemption Rules

External/Manual Payments (Payroll only)

Do one of the following:

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select External Pay.

Or:

1. Choose Fastpath –> External / Manual Payments in the Navigator.
2. In the resulting Find window, query the person.

Extract Definition

- Choose Mass Information Exchange –> System Extract –> Extract Definition in the Navigator.

Extract Results

- Choose Benefits Extract –> Extract Results in the Navigator.

Extract Results Errors

1. Choose Benefits Extract –> Extract Results in the Navigator.

Extract Results Detail

1. Choose Benefits Extract –> Extract Results in the Navigator.
2. Query an extract run result and choose the Details button.

Extract Results Header and Trailer

1. Choose Benefits Extract –> Extract Results in the Navigator.
2. Query an extract run result and choose the Header and Trailer button.
3. Query an extract run result and choose the Errors and Warnings button.

Federal Tax Rules

1. Choose Work Structures –> Organization –> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select Federal Tax Rules

Federal Tax Rules <Employee>

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Chose the Tax Information button.

File Layout Advanced Conditions

1. Choose Benefits Extract –> Layout Definition in the Navigator.
2. Choose the File Layout tab and query or enter a file layout.
3. Select a record and choose the Advanced Conditions button.

Flex Credits (Advanced Benefits only)

- Choose Total Compensation –> General Definitions –> Rate / Coverage Definitions –> Flex Credits in the Navigator.

Flex Program (Advanced Benefits only)

- Choose People –> Total Comp Enrollment –> Flex Program in the Navigator.

Form 941 Information

- Choose View –> Tax Information –> Form 941 Information in the Navigator.

Form Customization

- Choose Security –> CustomForm in the Navigator.

Formula

- Choose Total Compensation –> Basic –> Write Formulas in the Navigator.

Formula Result Rules (Payroll only)

- Choose Total Compensation –> Basic –> Formula Results in the Navigator.

Frequency Rules

1. Choose Total Compensation –> Basic –> Deductions in the Navigator.
2. Enter or query a deduction.
3. Choose the Frequency Rules button.

GL Map (Payroll only)

- Choose Payroll –> GL Flexfield Map in the Navigator.

Globals

- Choose Total Compensation –> Basic –> Global Values in the Navigator.

GL Daily Rates

- Choose Total Compensation –> Basic –> Global Values in the Navigator.

Goods and Services

- Choose Total Compensation –> General Definitions –> Additional Setup –> Goods and Services in the Navigator.

Grade Rate

- Choose Work Structures –> Grade –> Grade Rate in the Navigator.

Grade Scale

- Choose Work Structures –> Grade –> Grade Steps and Points in the Navigator.

Grade Step Placement

Do one of the following:

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Grade Step.

Or:

1. Choose Fastpath –> Grade Step in the Navigator.
2. In the resulting Find window, query the person.

Grades

- Choose Work Structures –> Grade –> Description in the Navigator.

Imputed Income

- Choose Total Compensation –> General Definitions –> Rate / Coverage Definitions –> Imputed Income in the Navigator.

Information Type Security

- Choose Security –> Information Types Security in the Navigator.

Input Values

1. Choose Total Compensation –> Basic –> Element Description in the Navigator.
2. Enter or query an element.
3. Choose the Input Values button.

Investment Options

1. Choose People –> Total Comp Enrollment –> Savings Plan in the Navigator.
2. Query a person.

3. Choose the Investment Options button.

Job

- Choose Work Structures –> Job –> Description in the Navigator.

Job Evaluation

1. Choose Work Structures –> Job –> Description in the Navigator.
2. Enter or query a job.
3. Choose the Evaluation button.

Job Requirements

1. Choose Work Structures –> Job –> Description in the Navigator.
2. Enter or query a job.
3. Choose the Requirements button.

Layout Definition

- Choose Benefits Extract –> Layout Definition in the Navigator.

Life Event

Do one of the following:

1. Choose Total Compensation –> Programs and Plans –> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plan and Plan Types button.
4. Choose the Plans tab or the Plan Types tab.
5. Choose the Life Event button.

Or:

1. Choose Total Compensation –> Programs and Plans –> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Life Event button.

Life Event Certifications

1. Choose Total Compensation –> Programs and Plans –> Plan Enrollment Requirements in the Navigator.
2. Query or enter a plan.

3. Choose the General tab.
4. Choose the Plan or Option tab.
5. Choose the Life Event Certifications button.

Life Event Reason Impact on Eligibility (Advanced Benefits)

1. Choose Total Compensation –> Programs and Plans –> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Options button.
4. Choose the Life Event Eligibility button.

Life Event Reasons (Advanced Benefits only)

- Choose Total Compensation –> General Definitions –> Additional Setup –> Life Event Reasons in the Navigator.

Limit Rules (Payroll only)

- Choose View –> Wage Attachments –> Limit Rules in the Navigator.

Link Input Values

1. Choose Total Compensation –> Basic –> Link in the Navigator.
2. Enter or query an element.
3. Choose the Input Values button.

List Assignments

- Choose View –> Lists –> Assignments in the Navigator.

List Budget Variance by Organization

- Choose View –> Organization Budgets in the Navigator.

List Employees by Absence Type

- Choose View –> Lists –> Employees by Absence Type in the Navigator.

List Employees by Element

- Choose View –> Lists –> Employees by Element in the Navigator.

List Employees by Organization

- Choose View –> Lists –> Employees by Organization in the Navigator.

List Employees by Position

- Choose View –> Lists –> Employees by Position in the Navigator.

List Employees by Position Hierarchy

- Choose View –> Lists –> Emps by Position Hierarchy in the Navigator.

List People by Assignment

- Choose View –> Lists –> People by Assignment in the Navigator.

List People by Special Information

- Choose View –> Lists –> People by Special Information in the Navigator.

List Position Budget Variance

- Choose View –> Position Budgets in the Navigator.

Local Tax Rules

1. Choose Work Structures –> Organization –> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select Local Tax Rules.

Location

- Choose Work Structures –> Location in the Navigator.

Lookups

- Choose Other Definitions –> Lookup Tables in the Navigator.

Maintain On Line Activities (Advanced Benefits)

- Choose Total Compensation –> General Definitions –> On–line Activities for Authentication in the Navigator.

Maintain Options Eligibility

1. Choose Total Compensation –> Programs and Plans –> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Options button.
4. Choose the Option Eligibility button.

Maintain Plan Eligibility

1. Choose Total Compensation –> Programs and Plans –> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Plan Eligibility button.

Maintain Plan Options

1. Choose Total Compensation –> Programs and Plans –> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Options button.

Maintain Plan Related Details

1. Choose Total Compensation –> Programs and Plans –> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Details button.

Maintain Pop Up Messages (Advanced Benefits only)

- Choose Total Compensation –> General Definitions –> Define Messages in the Navigator.

Map Career Path

- Choose Work Structures –> Job –> Career Path in the Navigator.

Map Salary Survey

1. Choose Work Structures –> Position –> Description in the Navigator.
2. Complete the Position window and save your work.
3. Choose the Define Survey Map button.

Or:

1. Choose Work Structures –> Job –> Description in the Navigator.
2. Complete the Job window and save your work.
3. Choose the Define Salary Map button.

Mass Move

- Choose Work Structures –> Position –> Mass Move in the Navigator.

Mass Move – Assignments

1. Choose Work Structures –> Position –> Mass Move in the Navigator.
2. Complete the Mass Move window and save your work.
3. Choose the Positions button.
4. Complete the Find Positions window.
5. Choose the Find button.
6. Complete the Mass Move – Positions window.
7. Choose the Assignments button.

Mass Move – Messages

1. Choose Work Structures –> Position –> Mass Move in the Navigator.
2. Complete the Mass Move window and save your work.
3. Choose the Positions button.
4. Complete the Find Positions window and choose the Find button.
5. Complete the Mass Move – Positions window and choose the Assignments button.
6. Complete the Mass Move – Assignments window and close it.
7. From the Mass Move – Positions window, choose the Valid Grades button.
8. Complete the Valid Grades window and close it.
9. Close the Mass Move – Positions window.
10. From the Mass Move window, choose the Execute button.
11. If the Status field shows In Error or Complete with Warnings, a Message button appears.
12. If the Message button appears, choose it to view messages in the Mass Move – Messages window.

Note: Alternatively, you can view messages for saved (but not yet successfully executed) mass moves as follows:

1. Choose Work Structures –> Position –> Mass Move in the Navigator.
2. Enter the name of the saved mass move in the Description field.
3. When the Mass Move window is populated with data and the Message button appears, choose the Message button .

Mass Move – Positions

1. Choose Work Structures –> Position –> Mass Move in the Navigator.
2. Complete the Mass Move window.
3. Save your work.
4. Choose the Positions button.
5. In the resulting Find Positions window, select or enter a Source Job and Source Position.
6. Choose the Find button.

Mass Move – Valid Grades

1. Choose Work Structures –> Position –> Mass Move in the Navigator.
2. Complete the Mass Move window and save your work.
3. Choose the Positions button.
4. Complete the Find Positions window.
5. Choose the Find button.
6. Complete the Mass Move – Positions window.
7. Choose the Valid Grades button.

Mass Update of Applicants

- Choose Recruitment –> Mass Update of Applicants in the Navigator.

Messages

1. Choose Mass Information eXchange: MIX –> Batch Element Entry in the Navigator.
2. Choose the Messages button.

Message Configuration (Advanced Benefits only)

- Choose Total Compensation –> General Definitions –> Message Configuration in the Navigator.

Miscellaneous Plan

- Choose People –> Total Comp Enrollment –> Miscellaneous Plan in the Navigator.

MIX Batch Header

- Choose Mass Information eXchange: MIX –> Batch Element Entry in the Navigator.

Monitor Batch Processes (Advanced Benefits only)

- Choose Processes and Reports –> Monitor Batch Processes in the Navigator.

Monthly Participant Premium

- Choose People –> Enrollment Process –> Monthly Participant Premium in the Navigator.

Monthly Plan or Option Premium

- Choose Total Compensation –> Monthly Premium in the Navigator.

Multiple Worksite Reporting

1. Choose Work Structures –> Organization –> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select Multiple Worksite Reporting

NACHA Rules

1. Choose Work Structures –> Organization –> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select NACHA Rules

Net Calculation Rules

1. Choose Total Compensation –> Basic –> Accrual Plans in the Navigator.
2. Enter or query an accrual plan name.

3. Choose the Net Calculation Rules button.

New Hire Reporting

1. Choose Work Structures –> Organization –> Description in the Navigator.
2. Enter or query a GRE.
3. Choose the Others button.
4. Select New Hire Reporting

Non–Flex Program

- Choose People –> Total Comp Enrollment –> Non–Flex Program in the Navigator.

5. Click in the Additional Organization Information field.

Options

- Choose Total Compensation –> General Definitions –> Programs and Plans –> Options in the Navigator.

Organization

- Choose Work Structures –> Organization –> Description in the Navigator.

Organization Hierarchy

- Choose Work Structures –> Organization –> Hierarchy in the Navigator.

Organizational Payment Method

- Choose Payroll –> Payment Methods in the Navigator.

Other Rates

1. Choose People –> Total Comp Enrollment –> Non–Flex Program in the Navigator.
2. Query a person.
3. Choose the Others button and select Other Rates.

Parent Organization

1. Choose Work Structures –> Organization –> Description in the Navigator.

2. Enter or query an organization.
3. Choose the Others button and select Parent Organization.

Participant

- Choose Total Compensation –> General Definitions –> Eligibility Profiles –> Participant in the Navigator.

Participation Eligibility Profiles

- Choose Total Compensation –> General Definitions –> Eligibility Profiles –> Participation Eligibility Profiles

Participation Overrides (Advanced Benefits only)

- Choose People –> Total Comp Participation –> Participation Overrides in the Navigator.

Payment Schedule

1. Choose Total Compensation –> Rates / Coverage Definitions –> Flex Credits in the Navigator.
2. Query or enter a flex credit definition and choose the Processing tabbed region.
3. Choose the Payment Schedule button.

Payments

1. Choose People –> Total Comp Contribution –> Record Contribution or Distribution
2. Choose the View Payments window.

Pay Scale

- Choose Work Structures –> Grade –> Pay Scale in the Navigator.

Payroll

- Choose Payroll –> Description in the Navigator.

Payroll Processes (Payroll only)

- Choose View –> Payroll Process Results in the Navigator.

People

- Choose People –> Enter and Maintain in the Navigator.

People Folder

- Choose View –> Lists –> People Folder in the Navigator.

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee, and choose the Assignment button.
3. Choose the Tax Information button.
4. Choose the Percentage button.

Performance

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee, and choose the Assignment button.
3. Choose the Salary button.
4. Choose the Performance button.

Or:

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee, and choose the Assignment button.
3. Choose the Others button and select Performance.

Period Dates

1. Choose Payroll –> Description in the Navigator.
2. Enter or query a payroll.
3. Choose the Period Dates button.

Period–to–Date Limits

Do one of the following:

- Choose Total Compensation –> General Definitions –> Rate / Coverage Definitions –> Period–to–Date Limits in the Navigator.

Or:

1. Choose Total Compensation –> Rates / Coverage Definitions –> Flex Credits in the Navigator.
2. Query a compensation object.
3. Choose the Activity Rate button.
4. Choose the Period to Date Limit button.

Period Types

- Choose Other Definitions –> Time Periods in the Navigator.

Person Benefits Assignment

- Choose People –> Total Comp Participation –> Person Benefits Assignment

Person Benefits Balances

- Choose People –> Total Comp Participation –> Person Benefits Balances in the Navigator.

Person Changes (Advanced Benefits only)

1. Choose Total Compensation –> General Definitions –> Additional Setup –> Life Event Reasons in the Navigator.
2. Query or enter a life event.
3. Choose the Person Changes button.
4. Choose the Add Person Change button.

Person Changes Cause Life Events (Advanced Benefits only)

1. Choose Total Compensation –> General Definitions –> Additional Setup –> Life Event Reasons in the Navigator.
2. Query or enter a life event.
3. Choose the Person Changes button.

Person Communications (Advanced Benefits only)

- Choose People –> Enrollment Process –> Person Communications in the Navigator.

Person Enrollment Action Items (Advanced Benefits only)

- Choose People –> Enrollment Process –> Person Enrollment Action Items in the Navigator.

Person Enrollment Certificates (Advanced Benefits only)

- Choose People –> Enrollment Process –> Person Enrollment Certificates in the Navigator.

Person Primary Care Provider

- Choose People –> Total Comp Enrollment –> Person Primary Care Provider in the Navigator.

Person Types

- Choose Other Definitions –> Person Types in the Navigator.

Person Type Usage

- Choose Fastpath –> Person Type Usage in the Navigator.

Personal Payment Method

Do one of the following:

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Pay Method button, or choose the Others button and select Pay Method.

Or:

1. Choose Fastpath –> Pay Method in the Navigator.
2. In the resulting Find window, query the person.

Phone Numbers

Do one of the following:

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button.
4. Choose Phones.

Or:

1. Choose Fastpath –> Phones in the Navigator.
2. In the resulting Find window, query the person.

Picture

Do one of the following:

1. Choose People –> Enter and Maintain in the Navigator
2. Enter or query a person.
3. Choose the Picture button.

Or:

1. Choose Fastpath –> Picture in the Navigator.
2. In the resulting Find window, query the person.

Plan and Plan Type

1. Choose Total Compensation –> Programs and Plans –> Programs in the Navigator.

Plan Enrollment Requirements

- Choose Total Compensation –> General Definitions –> Programs and Plans –> Plan Enrollment Requirements in the Navigator.

2. Query or enter a program.
3. Choose the Plan and Plan Types button.

Plan in Program Participation Eligibility

1. Choose Total Compensation –> Programs and Plans –> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plan and Plan Types button.
4. Choose the Plans tab.
5. Choose the Participation Eligibility button.

Plan Reimbursement

- Choose Total Compensation –> General Definitions –> Programs and Plans –> Plan Reimbursement in the Navigator.

Plans

- Choose Total Compensation –> General Definitions –> Programs and Plans –> Plans in the Navigator.

Plan Type Participation Eligibility

1. Choose Total Compensation –> Programs and Plans –> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plan and Plan Types button.
4. Choose the Plan Type tab.
5. Choose the Participation Eligibility button.

Plan Types

- Choose Total Compensation –> General Definitions –> Programs and Plans –> Plan Types in the Navigator.

Position

- Choose Work Structures –> Position –> Description in the Navigator.

Position Evaluation

1. Choose Work Structures –> Position –> Description in the Navigator.
2. Enter or query a position.
3. Choose the Evaluation button.

Position Hierarchy

- Choose Work Structures –> Position –> Hierarchy in the Navigator.

Position Occupancy Folder

1. Choose Work Structures –> Position –> Description in the Navigator.
2. Query a position.
3. Choose the Occupancy button.

Position Reporting To

1. Choose Work Structures –> Position –> Description in the Navigator.
2. Enter or query a position.
3. Choose the Reporting To button.

Position Requirements

1. Choose Work Structures –> Position –> Description in the Navigator.
2. Enter or query a position.
3. Choose the Requirements button.

Possible Certifications

1. Choose People –> Total Comp Participation

2. Choose the Enrollment Opportunities button.
3. Choose the Electable Choices button
4. Choose the Possible Certifications button

Postal/Zip

- Choose Total Compensation –> General Definitions –> Eligibility / Rate Factors –> Postal / Zip in the Navigator.

Primary Care Providers

Do one of the following:

- Choose People –> Total Comp Enrollment –> Person Primary Care Provider

Or:

1. Choose People –> Total Comp Enrollment –> Flex Program in the Navigator.
2. Query a person.
3. Choose the Care Providers button.

Program/Plan Years

- Choose Total Compensation –> General Definitions –> Additional Setup –> Program / Plan Years in the Navigator.

Programs

- Choose Total Compensation –> General Definitions –> Programs and Plans –> Programs in the Navigator.

Program Enrollment Requirements

- Choose Total Compensation –> General Definitions –> Programs and Plans –> Program Enrollment Requirements in the Navigator.

Program Participation Eligibility

1. Choose Total Compensation –> Programs and Plans –> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Participation Eligibility button.

Program Waive Certifications

1. Choose Total Compensation –> Programs and Plans –> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plan and Plan Types button.
4. Choose the Plan Types tab.
5. Choose the Waive button.
6. Choose the Waive Certification button.

Program Waive Reasons

1. Choose Total Compensation –> Programs and Plans –> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plan and Plan Types button.
4. Choose the Plan Types tab.
5. Choose the Waive button.

Qualifications

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Others button and select Qualifications.

Qualification Types

- Choose Career Management –> Qualification Types in the Navigator.

QuickPaint Inquiry

1. Choose Processes and Reports –> Run a QuickPaint Report in the Navigator.
2. Query a report that has been run.
3. Choose the View Report button.

QuickPay (Payroll only)

Do one of the following:

1. Choose People –> Enter and Maintain in the Navigator.

2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select QuickPay.

Or:

1. Choose Fastpath –> QuickPay in the Navigator.
2. In the resulting Find window, query the person.

Rating Scales

- Choose Career Management –> Rating Scales in the Navigator.

Record Continuing Benefits Payments

- Choose People –> Total Comp Contribution –> Record Continuing Benefits Payments in the Navigator.

Record Layout Advanced Conditions

1. Choose Benefits Extract –> Layout Definition in the Navigator.
2. Choose the Record Layout tab and query or enter a record layout.
3. Select a Data Element and choose the Advanced Conditions button.

Recruiting For

1. Choose Recruitment –> Recruitment Activity in the Navigator.
2. Enter or query a recruitment activity.
3. Choose the Recruiting For button.

Recruitment Activity

- Choose Recruitment –> Recruitment Activity in the Navigator.

Regulations

- Choose Total Compensation –> General Definitions –> Additional Setup –> Regulations in the Navigator.

Regulatory Bodies and Regulations

1. Choose Total Compensation –> General Definitions –> Additional Setup –> Reporting Groups in the Navigator.
2. Query or enter a reporting group.
3. Choose the Plan Regulatory Bodies and Regulations button.

Reimbursements Requests (Advanced Benefits only)

- Choose People –> Total Comp Distribution –> Reimbursements Requests in the Navigator.

Related Person Changes (Advanced Benefits only)

1. Choose Total Compensation –> General Definitions –> Additional Setup –> Life Event Reasons in the Navigator.
2. Query or enter a life event.
3. Choose the Related Person Changes button.
4. Choose the Add Related Person Change button.

Related Person Changes Cause Life Events (Advanced Benefits only)

1. Choose Total Compensation –> General Definitions –> Additional Setup –> Life Event Reasons in the Navigator.
2. Query or enter a life event.
3. Choose the Related Person Changes button.
1. Choose Work Structures –> Organization –> Description in the Navigator.
2. Enter or query a Business Group.
3. Choose the Others button and select Reporting Categories.

Reporting Groups

- Choose Total Compensation –> General Definitions –> Additional Setup –> Reporting Groups in the Navigator.

Reporting Statuses

1. Choose Work Structures –> Organization –> Description in the Navigator.
2. Enter or query a Business Group.
3. Choose the Others button and select Reporting Statuses.

Request Letter

- Choose Recruitment –> Request Recruitment Letter in the Navigator.

Request Set

- Choose Security –> Report Sets in the Navigator.

Requisition and Vacancy

- Choose Recruitment –> Requisition and Vacancy in the Navigator.

RetroPay Set (Payroll only)

- Choose Payroll –> RetroPay Set in the Navigator.

Reverse Payroll Run (Payroll only)

Do one of the following:

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Reverse Run.

Or:

1. Choose Fastpath –> Reverse Payroll Run in the Navigator.
2. In the resulting Find window, query the person.

Rows

1. Choose Other Definitions –> Table Structure in the Navigator.
2. Enter or query a table.
3. Choose the Rows button.

Run QuickPaint Report

- Choose Processes and Reports –> Run a QuickPaint Report in the Navigator.

Salary Administration

Do one of the following:

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Salary button.

Or:

1. Choose Fastpath –> Salary in the Navigator.
2. In the resulting Find window, query the person.

Salary Basis

- Choose Total Compensation –> Basic –> Salary Basis in the Navigator.

Salary History

Do one of the following:

1. Choose View –> Histories –> Salary in the Navigator.
2. Run a query in the Assignments Folder window.
3. Select an employee assignment and choose the Salary History button.

Or:

1. Choose Fastpath –> Salary History in the Navigator.
2. In the resulting Find window, query the person.

Salary Management Folder

- Choose People –> Salary Management in the Navigator.

Salary Surveys

- Choose Total Compensation –> Basic –> Salary Survey in the Navigator.

Savings Plan

- Choose People –> Total Comp Enrollment –> Savings Plan in the Navigator.

Scale Rate

- Choose Work Structures –> Grade –> Point Values in the Navigator.

Schools and Colleges

- Choose Career Management –> Schools and Colleges in the Navigator.

Schools and Colleges Attended

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Others button and select Schools / Colleges.

Secondary Statuses

Do one of the following:

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an applicant or employee.
3. Do one of the following:

   For an applicant:

   - Choose the Others button and select Application.
   - Choose the Secondary Status button.

   For an employee:

   - Choose the Assignment button.
   - Choose the Others button and select Secondary Status.

Or:

1. Choose Fastpath –> Secondary Status in the Navigator.
2. In the resulting Find window, query the person.

Security Profile

- Choose Security –> Profile in the Navigator.

Service Areas

- Choose Total Compensation –> General Definitions –> Eligibility / Rate Factors –> Service Areas in the Navigator.

Sort

1. Choose Benefits Extract –> Layout Definition in the Navigator.
2. Choose the File Layout tab and select a Record Name.
3. Choose the Sort button.

Special Information

Do one of the following:

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Special Info button.

Or:

1. Choose Fastpath –> Special Information in the Navigator.
2. In the resulting Find window, query the person.

Special Rates

1. Choose People –> Total Comp Enrollment –> Flex Program in the Navigator.
2. Query a person.
3. Choose the Special Rates button.

Special Information Types

■ Choose Other Definitions –> Special Information Types in the Navigator.

SQWL Employer Rules (1) (Payroll only)

1. Choose Work Structures –> Organization –> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select SQWL Employer Rules (1)

SQWL Employer Rules (2) (Payroll only)

1. Choose Work Structures –> Organization –> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select SQWL Employer Rules (2)

SQWL Generic Transmitter Rules (Payroll only)

1. Choose Work Structures –> Organization –> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select SQWL Generic Transmitter Rules

Standard Distributions/Contributions

■ Choose Total Compensation –> General Definitions –> Rate / Coverage Definitions –> Standard Distributions / Contributions in the Navigator.

SQWL State-Specific Transmitter Rules (Payroll only)

1. Choose Work Structures –> Organization –> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select SQWL State Transmitter Rules

State Tax Rules

1. Choose Work Structures –> Organization –> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select State Tax Rules.

State Tax Rules <Employee>

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Chose the Tax Information button.
4. Choose the Tax information button from the Federal Tax Rules <Employee> window.

Statement of Earnings (Payroll only)

Do one of the following:

1. Choose View –> Assignment Process Results
2. Choose the SOE Report button.

Or:

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Statement of Earnings.

Or:

1. Choose Fastpath –> US Statement of Earnings in the Navigator.
2. In the resulting Find window, query the person.

Standard Rates

- Choose Total Compensation –> General Definitions –> Rate / Coverage Definitions –> Standard Rates in the Navigator.

Submit a New Request

1. Choose Processes and Reports –> Submit Processes and Reports in the Navigator.
2. Select Single Request or a Request Set.

Table Structure

- Choose Other Definitions –> Table Structure in the Navigator.

Table Values

- Choose Other Definitions –> Table Values in the Navigator.

Update Payroll Run (Payroll only)

- Choose Payroll –> Update Payroll Run in the Navigator.

User Types and Statuses

- Choose Other Definitions –>User Types and Statuses

Valid Grades (for jobs)

1. Choose Work Structures in the Navigator.
2. Choose either Job –> Description or Position –> Description.
3. Enter or query a job or position.
4. Choose the Valid Grades button.

Valid Payment Methods

1. Choose Payroll –> Description in the Navigator.
2. Enter or query a payroll.
3. Choose the Valid Payment Methods button.

Variable Rate Profiles

- Choose Total Compensation –> General Definitions –> Rate / Coverage Definitions –> Variable Rate Profiles in the Navigator.

VETS–100 Filing

1. Choose Work Structures –> Organization –> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select VETS–100 Filing.

View Absence History

- Choose View –> Histories –> Absence in the Navigator.

View Earnings and Deductions Balances

Do one of the following:

1. Choose View –> Employee Balances in the Navigator.
2. Select an employee assignment and choose the Balances button.

Or:

1. Choose Fastpath –> Employee Balances in the Navigator.
2. In the resulting Find window, query the person.

View Element Entry History for Employee

1. Choose View –> Histories –> Entries in the Navigator.
2. Run a query in the Assignments Folder window.
3. Select an employee assignment and choose the Entry History button.

View Employee Dental, Medical and Vision Benefits

1. Choose View –> Employee Benefits in the Navigator.
2. Run a query in the Assignments Folder window.
3. Select an employee assignment and choose the View Benefits button.

View Employee Grade Comparatio

- Choose View –> Grade Comparatio in the Navigator.

View Enrollment Results

- Choose People –> Total Comp Enrollment –> View Enrollment Results in the Navigator.

View Participation Information (Advanced Benefits only)

- Choose People –> Total Comp Participation –> View Participation Infomation in the Navigator.

View Program Structure

- Choose Total Compensation –> Programs and Plans –> View Program Structure in the Navigator.

View Run Messages (Payroll only

- Choose View –> System Messages in the Navigator.

View Tax Balances

Do one of the following:

1. Choose View –> Tax Information –> Tax Balances in the Navigator.
2. Select an employee assignment and choose the Balances button.

Or:

1. Choose Fastpath –> Tax Balances in the Navigator.
2. In the resulting Find window, query the person.

View Vacancies

- Choose View –> Vacancies in the Navigator.

W2 Reporting Rules

1. Choose Work Structures –> Organization –> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select W2 Reporting Rules.

W941 (Payroll only)

- Choose View –> Tax Information–> Form 941 Information in the Navigator

WC Codes and Rates

- Choose Work Structures –> Job –> Workers Compensation Rates in the Navigator

Wage Attachment Earnings Rules

- Choose Total Compensation –> Wage Attachment –> Earnings Rules in the Navigator.

Wage Attachment Exemption Rules

- Choose Total Compensation –> Wage Attachment –> Exemption Rules in the Navigator.

Wage Attachment Limit Rules

- Choose Total Compensation –> Wage Attachment –> Limit Rules in the Navigator.

Waive Participation (Advanced Benefits only)

- Choose People –> Total Comp Participation –> Waive Participation in the Navigator.

1. Choose Total Compensation –> Programs and Plans –> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Waiving button.

What–if Eligibility (Advanced Benefits only)

- Choose People –> Total Comp Participation –> What–if Eligibility in the Navigator.

Work Choices (Job and Position)

1. Choose Work Structures –>Job or Position –> Description in the Navigator.
2. Enter or query a job or position.
3. Choose the Work Choices button.

Work Choices (Person)

1. Choose People –> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Others button and select Work Choices.

Work Day Information

1. Choose Work Structures –> Organization –> Description in the Navigator.

2. Enter or query an organization.
3. Choose the Others button and select Work Day Information.

Work Schedule

1. Choose Work Structures –> Organization –> Description in the Navigator.
2. Enter or query an organization.
3. Choose the Others button and select Work Schedule.

Work Site Filing

1. Choose Work Structures –> Organization –> Description in the Navigator.
2. Enter or query a Reporting Establishment.
3. Choose the Others button and select Work Site Filing.

Worker's Compensation

- Choose Work Structures –> Job –> Workers Compensation Codes in the Navigator

Reports and Processes in Oracle HRMS

AAP Reports

- Provides Job group analysis and workflow analysis reports.

See: *Using Oracle HRMS – The Fundamentals.*

Absences Report

- Absence details for an employee or organization, for some or all absence types.

See: *Managing Compensation and Benefits Using Oracle HRMS.*

ADA Reports

- Shows how your enterprise is responding to the requests of employees with disabilities.

Annual Unemployment Insurance (Form 940) Information (Payroll only)

- Provides numbers for annual 940 filing.

Assignment Status Report

- All employees, applicants or both assigned to selected work structures.

See: *Managing People Using Oracle HRMS.*

Audit Report (Payroll only)

- Selects person, employee or applicant, assignment, element, recurring or non–recurring status. Shows Business Group, GRE, assignment details, person entering data (responsibility), input date, effective change date, details of person affected. Lists all fields changed, with input date and effective date, old value and new value, responsibility, workstation address.

See: *Customizing, Reporting and System Administration in Oracle HRMS.*

COBRA Reports

- Coverage of payments report and publish standard COBRA letter.

See: *Managing Compensation and Benefits Using Oracle HRMS.*

Cost Breakdown Report (Payroll only)

- Summarized costing totals for a specified costing process and summarized costing totals for a particular consolidation set or payroll and payroll period.

See: *Using Oracle HRMS – The Fundamentals.*

Cost Breakdown Summary Report (Payroll only)

- Lists costing details by date range, payroll, consolidation set, GRE and segment values.

See: *Using Oracle HRMS – The Fundamentals.*

Current and Projected Progression Point Values Report

- The *expected* results of running the Increment Progression Points process, that is the projected point and value changes for a group of employees.

See: *Using Oracle HRMS – The Fundamentals.*

Earnings Audit (Payroll only)

- Report detailing all employees with a particular element being processed in a given pay period.

See: *Running Your Payroll Using Oracle HRMS.*

EEO–1 Reports

- EEO individual establishment and headquarters report and EEO consolidated report.

See: *Using Oracle HRMS – The Fundamentals.*

Element Link Details Report

- The eligibility criteria for an element or group of elements.

See: *Managing Compensation and Benefits Using Oracle HRMS.*

Element Result Listing

- Run results processed for a particular element over a defined period, and run results for selected input values of each employee's last assignment process.

See: *Running Your Payroll Using Oracle HRMS.*

Employee Increment Results Report

- The *actual* results of running the Increment Progression Points process, that is progression point and value changes for a group of employees.

See: *Using Oracle HRMS – The Fundamentals.*

Employee Organization Movements Report

- New hires, terminations, transfers in and transfer out of a selected organization, or organization hierarchy.

See: *Managing People Using Oracle HRMS.*

Employee Payroll Movements Report (Payroll only)

- New hires, terminations, transfers in and transfer out of a selected payroll.

See: *Managing People Using Oracle HRMS.*

Employee Run Results (Payroll only)

- Users may select various elements for the various time frames, assignment of GREs. The report shows the run results for selected information by pay period.

See: *Running Your Payroll Using Oracle HRMS.*

Employee Summary Report

- Addresses, contacts, periods of service, assignments, special information, personal payment methods and element entries for a selected employee.

See: *Managing People Using Oracle HRMS.*

Federal W–2 (magnetic media) (Payroll only)

- Creation of Federal W–2 magnetic media and summary totals.

See: *Running Your Payroll Using Oracle HRMS.*

Federal W–2 Forms (Payroll only)

- Prints employee W–2s at an individual level, thus allowing W–2s to be created as employees terminate, or for an entire GRE.

See: *Running Your Payroll Using Oracle HRMS.*

Federal 1099–R (magnetic media) (Payroll only)

- Creation of Federal 10999R magnetic media.

See: *Running Your Payroll Using Oracle HRMS.*

Federal 1099–R Forms (Payroll only)

- Provides for printing of retiree 1099–R at an individual level as well as all employees in a GRE.

See: *Running Your Payroll Using Oracle HRMS.*

Full Personal Details Report Set

- Person details, applicant details, assignment details and work details for one employee.

See: *Managing People Using Oracle HRMS.*

GRE Totals (Payroll only)

- Reconciliation report to be used to assist in period end processing balancing purposes. This report shows Federal and State level taxable balances and withholdings.

See: *Running Your Payroll Using Oracle HRMS.*

Gross to Net Summary US (Payroll only)

- Details of total earnings and deductions summarized for a specified payroll and payroll period.

See: *Running Your Payroll Using Oracle HRMS.*

Invalid Address Report (Payroll only)

- Lists any address information inconsistencies.

See: *Running Your Payroll Using Oracle HRMS.*

Job and Position Skills Matching Report

- Lists of employees, applicants or both that meet some or all skill requirements of a job or position.

See: *Managing People Using Oracle HRMS.*

Multiple Worksite Report

- Reports on wages and locations of employees in all the multiple locations across all SUIs and other GREs.

See: *Managing People Using Oracle HRMS.*

NACHA (magnetic media) (Payroll only)

- Provides for creation of employee NACHA information to be submitted.

See: *Running Your Payroll Using Oracle HRMS.*

NACHA Report (Payroll only)

- Detail of employee NACHA information.

See: *Running Your Payroll Using Oracle HRMS.*

Negative Balance Reports (Payroll only)

- Report listing any negative balances found due to user adjustments or conversion issues..

See: *Running Your Payroll Using Oracle HRMS.*

New Hire Reports

- Report on newly hired or rehired employees.

See: *Using Oracle HRMS – The Fundamentals.*

Organization Hierarchy Report

- The organizations and optionally their managers below a selected position in a particular hierarchy.

See: *Using Oracle HRMS – The Fundamentals.*

OSHA Reports

- Report on work related injuries or illness.

See: *Using Oracle HRMS – The Fundamentals.*

Payments Register (Payroll only)

- Reports listing payments made to employees, listing payment method, check number, and amount.

See: *Running Your Payroll Using Oracle HRMS.*

Payroll Message Report (Payroll only)

- Display messages for processes connected to specified payrolls.

See: *Running Your Payroll Using Oracle HRMS.*

Position Hierarchy Report

- The positions and optionally their holders below a selected position in a particular hierarchy.

See: *Using Oracle HRMS – The Fundamentals.*

Requisition Summary Report

- Applicants and their interview schedules for a selection of vacancies.

See: *Managing People Using Oracle HRMS.*

Salary Review Report

- Current, past and proposed salaries for a selected list of employees.

See: *Managing Compensation and Benefits Using Oracle HRMS.*

Series EE Bond Purchase Report

- Compares actual staffing level with budgeted levels over a specific period.

Staffing Budget Details Report

- Actual staffing level with budgeted levels over a specified period.

See: *Managing People Using Oracle HRMS.*

Statement of Earnings (Payroll only)

- Check writer process produces paychecks with statement of earnings.

See: *Running Your Payroll Using Oracle HRMS.*

Terminations Report

- The number of employees from selected organizations leaving your enterprise within a particular period, and the reason for leaving.

See: *Managing People Using Oracle HRMS.*

VETS–100 Reports

- Shows number of special disabled and Vietnam era veterans you employ in each of nine job categories. Also, show total number of new hires in each job category and number of new hires in each category who qualify as special disabled veterans and Vietnam era veterans.

See: *Using Oracle HRMS – The Fundamentals.*

Void Payments (Payroll only)

- Details of cancelled check payments.

See: *Running Your Payroll Using Oracle HRMS.*

Processes

Audit Trail Update Tables Process

- This process is used to set up audit trail on selected windows.

See: *Customizing, Reporting and System Administration in Oracle HRMS.*

Audit Trail Update Datetracked Tables Process

- This process is used to set up audit trail on selected windows.

See: *Customizing, Reporting and System Administration in Oracle HRMS.*

BEE Batch Process (Purge)

- This process is used to delete a batch from the BEE tables on completion of the concurrent request.

See: *Managing Compensation and Benefits Using Oracle HRMS.*

BEE Batch Process (Validate)

- This process is used to test each batch line against predefined rules about element entries, and against any additional validation procedures that you have created.

See: *Managing Compensation and Benefits Using Oracle HRMS.*

BEE Batch Process (Transfer)

- This process is used to create element entries in the Oracle HRMS Entries table from the existing entries in the BEE temporary tables.

See: *Managing Compensation and Benefits Using Oracle HRMS.*

BEE Batch Process (Rollback)

- This process is used to completely remove a BEE transfer, provided you have not purged the batch from the BEE tables

See: *Managing Compensation and Benefits Using Oracle HRMS.*

Bulk Compile Formulas

- Run this process to compile all your formulas.

See: *Using Oracle FastFormula.*

Check Writer Process (Payroll only)

- This process is used to write sequences of checks for your payroll run.

See: *Running Your Payroll Using Oracle HRMS.*

Close Action Items Process (Advanced Benefits Only)

- Run this process before the Close Enrollments Process to close any open action items that are required or optional for the persons you select.

See: *Managing Compensation and Benefits Using Oracle HRMS.*

Close Enrollments Process (Advanced Benefits Only)

- Run this process to close a person's enrollment after elections have been made.

See: *Managing Compensation and Benefits Using Oracle HRMS.*

Communications Triggers Process (Advanced Benefits Only)

- Use the communications triggers process to generate communications for persons who meet the selection criteria that you specify.

See: *Managing Compensation and Benefits Using Oracle HRMS.*

Costing Process

- Generates journal entries for your ledgers and costing information relating to labor costs.

See: *Using Oracle HRMS – The Fundamentals.*

Default Enrollment Process (Advanced Benefits Only)

- Run this process to enroll participants into the default benefit plan when participants have not made an election.

See: *Managing Compensation and Benefits Using Oracle HRMS.*

Dependent Eligibility Process (Advanced Benefits Only)

- Run this process for those benefit plans that include an age factor in determining dependent eligibility.

See: *Managing Compensation and Benefits Using Oracle HRMS*.

Extract Process (Advanced Benefits Only)

- Run the extract process to save the output of your system extract to the directory and file that you specified in your extract definition.

See: *Managing Compensation and Benefits Using Oracle HRMS*.

Enable Multiple Security Groups Process

- Run this process when you first set up single responsibility security.

See: *Customizing, Reporting and System Administration in Oracle HRMS*.

Grant Permissions to Roles Process (ROLEGEN)

- Dynamically grants select permissions on Oracle HRMS tables and views to the HR_REPORTING_USER role.

See: *Customizing, Reporting and System Administration in Oracle HRMS*.

Generate Secure User Process (SECGEN)

- Run this process when you create a new security profile that references a reporting user.

See: *Customizing, Reporting and System Administration in Oracle HRMS*.

NACHA Process (Payroll only)

- Produces files that you load on magnetic tape and despatch to banks for direct deposit payments.

See: *Running Your Payroll Using Oracle HRMS*.

Participation Batch Process: Life Event (Advanced Benefits Only)

- Run this process to determine eligibility and electable choices for benefits participants based on a life event you select.

See: *Managing Compensation and Benefits Using Oracle HRMS*.

Participation Batch Process: Scheduled (Advanced Benefits Only)

- Run this process to determine eligibility and electable choices for benefits participants based on a scheduled enrollment event.

See: *Managing Compensation and Benefits Using Oracle HRMS*.

Participation Batch Process: Selection (Advanced Benefits Only)

- Run this process to determine eligibility for benefits participants. This process does not create electable choices.

See: *Managing Compensation and Benefits Using Oracle HRMS.*

PrePayments Process (Payroll only)

- Use this process to distribute employee pay over more than one payment method using either a percentage or monetary split.

See: *Running Your Payroll Using Oracle HRMS.*

Retry Payroll Process (Payroll only)

- Retry a payroll process again.

See: *Running Your Payroll Using Oracle HRMS.*

RetroPay Process (Payroll only)

- Enables you to make back pay adjustments.

See: *Running Your Payroll Using Oracle HRMS.*

Security List Maintenance Process (LISTGEN

- This process is usually run every night to maintain the lists of organizations, positions, payrolls, employees, and applicants that security profile holders can access.

See: *Customizing, Reporting and System Administration in Oracle HRMS.*

Synchronize Positions Process

- This process updates the non–datetracked Positions table (PER_ALL_POSITIONS_F) with changes made to the datetracked table (HR_ALL_POSITIONS_F). When you run the process, any datetracked changes with an effective date on or before today are applied to the non–datetracked table.

Void Payments Process (Payroll only)

- Allows you to void checks that have been printed but need to be cancelled.

See: *Running Your Payroll Using Oracle HRMS.*

Glossary

360 Degree Appraisal Part of the SSHR Appraisal function and also known as a Group Appraisal. This is an employee appraisal undertaken by managers with participation by reviewers.

360 Degree Self Appraisal Part of the SSHR Appraisal function and also known as a Group Appraisal. This is a 360 Degree appraisal initiated by an employee. The employee (initiator) can add managers and reviewers to the appraisal.

A

Absence Types Categories of absence, such as medical leave or vacation leave, that you define for use in absence windows.

Accrual Band A range of values that determines how much paid time off an employee accrues. The values may be years of service, grades, hours worked, or any other factor.

Accrual Plan See: *PTO Accrual Plan*

Accrual Period The unit of time, within an accrual term, in which PTO is accrued. In many plans, the same amount of time is accrued in each accrual period, such as two days per month. In other plans, the amount accrued varies from period to period, or the entitlement for the full accrual term is given as an up front amount at the beginning of the accrual term.

Accrual Term The period, such as one year, for which accruals are calculated. In most accrual plans, unused PTO accruals must be carried over or lost at the end of the accrual term. Other plans have a rolling accrual term which is of a certain duration but has no fixed start and end dates.

Activity Rate The monetary amount or percentage associated with an activity, such as $12.35 per pay period as an employee payroll contribution for medical coverage. Activity rates can apply to participation, eligibility, coverages, contributions, and distributions.

Actual Premium The per–participant premium an insurance carrier charges the plan sponsor for a given benefit.

Administrative Enrollment A type of scheduled enrollment caused by a change in plan terms or conditions and resulting in a re–enrollment.

Applicant A candidate for employment in a Business Group.

Appraisee A person being appraised by an appraiser..

Appraiser A person, usually a manager, who appraises an employee.

Appraisal An appraisal is a process where an employee's work performance is rated and future objectives set. See also: *Assessment.*

Appraising Manager The person who initiates and performs an Employee–Manager or 360 Degree Appraisal. An appraising manager can create appraisal objectives.

Apply for a Job An SSHR function that enables an employee to, apply, search and prepare applications for an internally advertised vacancy.

Arrestment Scottish court order made out for unpaid debts or maintenance payments. See also: *Court Order*

Assessment An information gathering exercise, from one or many sources, to evaluate a person's ability to do a job. See also: *Appraisal.*

Assignment An employee's assignment identifies his or her role and payroll within a Business Group. The assignment is made up of a number of assignment components. Of these, organization is mandatory, and payroll is a required component for payment purposes.

Assignment Number A number that uniquely identifies an employee's assignment. An employee with multiple assignments has multiple assignment numbers.

Assignment Set A grouping of employees and / or applicants that you define for running QuickPaint reports and processing payrolls. See also: *QuickPaint Report*

Assignment Status For employees, used to track their permanent or temporary departures from your enterprise, and to control the remuneration they receive. For applicants, used to track the progress of their applications.

B

BACS Banks Automated Clearing System. This is the UK system for making direct deposit payments to employees.

Balances Positive or negative accumulations of values over periods of time normally generated by payroll runs. A balance can sum pay values, time periods or numbers. See also: *Predefined Components*

Balance Adjustment A correction you make to a balance. You can adjust user balances and assignment level predefined balances only.

Balance Dimension The period for which a balance sums its balance feeds, or the set of assignments / transactions for which it sums them. There are five time dimensions: Run, Period, Quarter, Year and User. You can choose any reset point for user balances.

Balance Feeds These are the input values of matching units of measure of any elements defined to feed the balance.

Bargaining Unit A bargaining unit is a legally organized group of people which have the right to negotiate on all aspects of terms and conditions with employers or employer federations. A bargaining unit is generally a trade union or a branch of a trade union.

Base Currency The currency in which Oracle Payroll performs all payroll calculations for your Business Group. If you pay employees in different currencies to this, Oracle Payroll calculates the amounts based on exchange rates defined in the system.

Behavioral Indicators Characteristics that identify how a competence is exhibited in the work context. See also: *Proficiency Level*

Benefit Any part of an employee's remuneration package that is not pay. Vacation time, employer–paid medical insurance and stock options are all examples of benefits. See also: *Elements*

Block The largest subordinate unit of a window, containing information for a specific business function or entity. Every window consists of at least one block. Blocks contain fields and, optionally, regions. They are delineated by a bevelled edge. You must save your entries in one block before navigating to the next. See also: *Region*, *Field*

Budget Value In Oracle Human Resources you can enter staffing budget values and actual values for each assignment to measure variances between actual and planned staffing levels in an organization or hierarchy.

Business Group The highest level organization in the Oracle HRMS system. A Business Group may correspond to the whole of your enterprise or to a major grouping such as a subsidiary or operating division. Each Business Group must correspond to a separate implementation of Oracle HRMS.

Business Number (BN) In Canada, this is the employer's account number with Revenue Canada. Consisting of 15 digits, the first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

C

Cafeteria Benefits Plan See: Flexible Benefits Program

Calendars In Oracle Human Resources you define calendars that determine the start and end dates for budgetary years, quarters and periods. For each calendar you select a basic period type. In Oracle SSP / SMP you define calendars to determine the start date and time for SSP qualifying patterns.

Calendar Exceptions In Oracle SSP / SMP you define calendar exceptions for an SSP qualifying pattern, to override the pattern on given days. Each calendar exception is another pattern which overrides the usual pattern.

Canada/Quebec Pension Plan (CPP/QPP) Contributions Contributions paid by employers and employees to each of these plans provide income benefits upon retirement.

Candidate Offers An SSHR function used by a line manager to offer a job to a candidate. This function is supplied with its own responsibility.

Career Path This shows a possible progression from one job or position from any number of other jobs or positions within the Business Group. A career path must be based on either job progression or position progression; you cannot mix the two.

Carry Over The amount of unused paid time off entitlement an employee brings forward from one accrual term to the next. It may be subject to an expiry date i.e. a date by which it must be used or lost. See also: *Residual*

Cash Analysis A specification of the different currency denominations required for paying your employees in cash. Union contracts may require you to follow certain cash analysis rules.

Certification Documentation required to enroll or change elections in a benefits plan as the result of a life event, to waive participation in a plan, to designate dependents for coverage, or to receive reimbursement for goods or services under an FSA.

Ceiling The maximum amount of unused paid time off an employee can have in an accrual plan. When an employee reaches this maximum, he or she must use some accrued time before any more time will accrue.

Child/Family Support payments In Canada, these are payments withheld from an employee's compensation to satisfy a child or family support order from a Provincial Court. The employer is responsible for withholding and remitting the payments to the court named in the order.

Collective Agreement A collective agreement is a form of contract between an employer or employer representative, for example, an employer federation, and a bargaining unit for example, a union or a union branch.

Communications Benefits plan information that is presented in some form to participants. Examples include a pre–enrollment package, an enrollment confirmation statement, or a notice of default enrollment.

Compensation The pay you give to employees, including wages or salary, and bonuses. See also: *Elements*

Competence Any measurable behavior required by an organization, job or position that a person may demonstrate in the work context. A competence can be a piece of knowledge, a skill, an attitude or an attribute.

Competence Evaluation A method used to measure an employees ability to do a defined job.

Competence Profile Where you record applicant and employee accomplishments, for example, proficiency in a competence.

Competence Requirements Competencies required by an organization, job or position. See also: *Competence, Core Competencies*

Competence Type A group of related competencies.

Consolidation Set A grouping of payroll runs within the same time period for which you can schedule reporting, costing, and post–run processing.

Contact A person who has a relationship to an employee that you want to record. Contacts can be dependents, relatives, partners or persons to contact in an emergency.

Contract A contract of employment is an agreement between an employer and employee or potential employee that defines the fundamental legal relationship between an employing organization and a person who offers his or her services for hire. The employment contract defines the terms and conditions to which both parties agree and those that are covered by local laws.

Contribution An employer's or employee's monetary or other contribution to a benefits plan.

Core Competencies Also known as *Leadership Competencies* or *Management Competencies*. The competencies required by every person to enable the enterprise to meet its goals. See also: *Competence*

Costable Type A feature that determines the processing an element receives for accounting and costing purposes. There are four costable types in Oracle HRMS: costed, distributed costing, fixed costing, and not costed.

Costing Recording the costs of an assignment for accounting or reporting purposes. Using Oracle Payroll, you can calculate and transfer costing information to your general ledger and into systems for project management or labor distribution.

Court Order A ruling from a court that requires an employer to make deductions from an employee's salary for maintenance payments or debts, and to pay the sums deducted to a court or local authority. See also: *Arrestment*

Cross Business Group Responsibility Security This security model uses security groups and enables you to link one responsibility to many Business Groups.

Customizable Forms Forms that your system administrator can modify for ease of use or security purposes by means of Custom Form restrictions. The Form Customization window lists the forms and their methods of customization.

D

Database Item An item of information in Oracle HRMS that has special programming attached, enabling Oracle FastFormula to locate and retrieve it for use in formulas.

Date To and Date From These fields are used in windows not subject to DateTrack. The period you enter in these fields remains fixed until you change the values in either field. See also: *DateTrack, Effective Date*

DateTrack When you change your effective date (either to past or future), DateTrack enables you to enter information that takes effect on your new effective date, and to review information as of the new date. See also: *Effective Date*

Deployment Factors See: *Work Choices*

Derived Factor A factor (such as age, percent of fulltime employment, length of service, compensation level, or the number of hours worked per period) that is used in calculations to determine Participation Eligibility or Activity Rates for one or more benefits.

Descriptive Flexfield A field that your organization can customize to capture additional information required by your business but not otherwise tracked by Oracle Applications. See also: *Key Flexfield*

Developer Descriptive Flexfield A flexfield defined by your localization team to meet the specific legislative and reporting needs of your country. See also: *Extra Information Types*

Direct Deposit The electronic transfer of an employee's net pay directly into the account(s) designated by the employee.

Distribution Monetary payments made from, or hours off from work as allowed by, a compensation or benefits plan.

E

Effective Date The date for which you are entering and viewing information. You set your effective date in the Alter Effective Date window. See also: *DateTrack*

EIT See: *Extra Information Type*

Elements Components in the calculation of employee pay. Each element represents a compensation or benefit type, such as salary, wages, stock purchase plans, and pension contributions.

Element Classifications These control the order in which elements are processed and the balances they feed. Primary element classifications and some secondary classifications are predefined by Oracle Payroll. Other secondary classifications can be created by users.

Element Entry The record controlling an employee's receipt of an element, including the period of time for which the employee receives the element and its value. See also: *Recurring Elements, Nonrecurring Elements*

Element Link The association of an element to one or more components of an employee assignment. The link establishes employee eligibility for that element. Employees whose assignment components match the components of the link are eligible for the element. See also: *Standard Link*

Element Set A group of elements that you define to process in a payroll run, or to control access to compensation information from a customized form, or for distributing costs.

Employee Histories An SSHR function for an employee to view their, Training History, Job Application History, Employment History, Absence History, or Salary History. A manager can also use this function to view information on their direct reports.

Employment Category A component of the employee assignment. Four categories are defined: Full Time – Regular, Full Time – Temporary, Part Time – Regular, and Part Time – Temporary.

Employment Insurance (EI) Benefit plan run by the federal government to which the majority of Canadian employers and employees must contribute.

Employment Insurance Rate In Canada, this is the rate at which the employer contributes to the EI fund. The rate is expressed as a percentage of the employee's contribution. If the employer maintains an approved wage loss replacement program, they can reduce their share of EI premiums by obtaining a reduced contribution rate. Employers would remit payroll deductions under a different employer account number for employees covered by the plan.

Employment Equity Occupational Groups (EEOG) In Canada, the Employment Equity Occupational Groups (EEOG) consist of 14 classifications of work used in the Employment Equity Report. The EEOGs were derived from the National Occupational Classification system.

Enroll in a Class An SSHR function which enables an employee to search and enroll in an internally published class. An employee can also use this function to maintain their competencies.

Enrollment Action Type Any action required to complete enrollment or de–enrollment in a benefit.

ESS Employee Self Service. A predefined SSHR responsibility.

Event An activity such as a training day, review, or meeting, for employees or applicants.

Expected Week of Confinement (EWC) In the UK, this is the week in which an employee's baby is due. The Sunday of the expected week of confinement is used in the calculations for Statutory Maternity Pay (SMP).

Extra Information Type (EIT) A type of developer descriptive flexfield that enables you to create an unlimited number of information types for six key areas in Oracle HRMS. Localization teams may also predefine some EITs to meet the specific legislative requirements of your country. See also: *Developer Descriptive Flexfield*

F

Field A view or entry area in a window where you enter, view, update, or delete information. See also: *Block, Region*

Flex Credit A unit of "purchasing power" in a flexible benefits program. An employee uses flex credits, typically expressed in monetary terms, to "purchase" benefits plans and / or levels of coverage within these plans.

Flexible Benefits Program A benefits program that offers employees choices among benefits plans and / or levels of coverage. Typically, employees are given a certain amount of flex credits or moneys with which to "purchase" these benefits plans and / or coverage levels.

Flexible Spending Account (FSA) Under US Internal Revenue Code Section 125, employees can set aside money on a pretax basis to pay for eligible unreimbursed health and dependent care expenses. Annual monetary limits and use–it–or–lose it provisions exist. Accounts are subject to annual maximums and forfeiture rules.

Form A predefined grouping of functions, called from a menu and displayed, if necessary, on several windows. Forms have blocks, regions and fields as their components. See also: *Block, Region, Field*

G

Global Value A value you define for any formula to use. Global values can be dates, numbers or text.

Goods or Service Type A list of goods or services a benefit plan sponsor has approved for reimbursement.

Grade A component of an employee's assignment that defines their level and can be used to control the value of their salary and other compensation elements.

Grade Comparatio A comparison of the amount of compensation an employee receives with the mid–point of the valid values defined for his or her grade.

Grade Rate A value or range of values defined as valid for a given grade. Used for validating employee compensation entries.

Grade Scale A sequence of steps valid for a grade, where each step corresponds to one point on a pay scale. You can place each employee on a point of their grade scale and automatically increment all placements each year, or as required. See also: *Pay Scale*

Grade Step An increment on a grade scale. Each grade step corresponds to one point on a pay scale. See also: *Grade Scale*

Grandfathered A term used in Benefits Administration. A person's benefits are said to be grandfathered when a plan changes but they retain the benefits accrued.

Group A component that you define, using the People Group key flexfield, to assign employees to special groups such as pension plans or unions. You can use groups to determine employees' eligibility for certain elements, and to regulate access to payrolls.

H

Hierarchy An organization or position structure showing reporting lines or other relationships. You can use hierarchies for reporting and for controlling access to Oracle HRMS information.

I

Imputed Income Certain forms of indirect compensation that US Internal Revenue Service Section 79 defines as fringe benefits and taxes the recipient accordingly. Examples include employer payment of group term life insurance premiums over a certain monetary amount, personal use of a company car, and other non–cash awards.

Initiator In SSHR a person who starts a 360 Degree appraisal (Employee or Self) on an individual. An initiator and the appraisee are the only people who can see all appraisal information.

Input Values Values you define to hold information about elements. In Oracle Payroll, input values are processed by formulas to calculate the element's run result. You can define up to fifteen input values for an element.

Instructions An SSHR user assistance component displayed on a web page to describe page functionality.

K

Key Flexfield A flexible data field made up of segments. Each segment has a name you define and a set of valid values you specify. Used as the key to uniquely identify an entity, such as jobs, positions, grades, cost codes, and employee groups. See also: *Descriptive Flexfield*

L

Leaver's Statement In the UK, this Records details of Statutory Sick Pay (SSP) paid during a previous employment (issued as form SSP1L) which is used to calculate a new employee's entitlement to SSP. If a new employee falls sick, and the last date that SSP was paid for under the previous employment is less than eight calendar weeks before the first day of the PIW for the current sickness, the maximum liability for SSP is reduced by the number of weeks of SSP shown on the statement.

Life Event A significant change in a person's life that results in a change in eligibility or ineligibility for a benefit.

Life Event Collision A situation in which the impacts from multiple life events on participation eligibility, enrollability, level of coverage or activity rates conflict with each other.

Life Event Enrollment A benefits plan enrollment that is prompted by a life event occurring at any time during the plan year.

Linking Interval In the UK, this is the number of days that separate two periods of incapacity for work. If a period of incapacity for work (PIW) is separated from a previous PIW by less than the linking interval, they are treated as one PIW according to the legislation for entitlement to Statutory Sick Pay (SSP). An employee can only receive SSP for the maximum number of weeks defined in the legislation for one PIW.

Linked PIWs In the UK, these are linked periods of incapacity for work that are treated as one to calculate an employee's entitlement to Statutory Sick Pay (SSP). A period of incapacity for work (PIW) links to an earlier PIW if it is separated by less than the linking interval. A linked PIW can be up to three years long.

LMSS Line Manager Self Service. A predefined SSHR responsibility.

Lookup Types Categories of information, such as nationality, address type and tax type, that have a limited list of valid values. You can define your own Lookup Types, and you can add values to some predefined Lookup Types.

Lower Earnings Limit (LEL) In the UK, this is the minimum average weekly amount an employee must earn to pay National Insurance contributions. Employees who do not earn enough to pay National Insurance cannot receive Statutory Sick Pay (SSP) or Statutory Maternity Pay (SMP).

M

Manager–Employee Appraisal Part of the SSHR Appraisal function. A manager appraisal of an employee. However, an appraising manager does not have to be a manager.

Maternity Pay Period In the UK, this is the period for which Statutory Maternity Pay (SMP) is paid. It may start at any time from the start of the 11th week before the expected week of confinement and can continue for up to 18 weeks. The start date is usually agreed with the employee, but can start at any time up to the birth. An employee is not eligible to SMP for any week in which she works or for any other reason for ineligibility, defined by the legislation for SMP.

Menus You set up your own navigation menus, to suit the needs of different users.

N

NACHA National Automated Clearing House Association. This is the US system for making direct deposit payments to employees.

Net Accrual Calculation The rule that defines which element entries add to or subtract from a plan's accrual amount to give net entitlement.

Net Entitlement The amount of unused paid time off an employee has available in an accrual plan at any given point in time.

Nonrecurring Elements Elements that process for one payroll period only unless you make a new entry for an employee. See also: *Recurring Elements*

North American Industrial Classification (NAIC) code The North American Industrial Classification system (NAICs) was developed jointly by the US, Canada and Mexico to provide comparability in statistics regarding business activity across North America. The NAIC replaces the US Standard Industrial Classification (SIC) system, and is used in the Employment Equity Report.

National Occupational Classification (NOC) code In Canada, the National Occupational Classification (NOC) System was developed to best reflect the type of work performed by employees. Occupations are grouped in terms of particular tasks, duties and responsibilities. The use of this standardized system ensures consistency of data from year to year within the same company as well as between companies. These codes are used in the Employment Equity Report.

Not in Program Plan A benefit plan that you define outside of a program.

O

Open Enrollment A type of scheduled enrollment in which participants can enroll in or alter elections in one or more benefits plans.

Oracle FastFormula An Oracle tool that allows you to write Oracle HRMS formulas without using a programming language.

Organization A required component of employee assignments. You can define as many organizations as you want within your Business Group. Organizations can be internal, such as departments, or external, such as recruitment agencies. You can structure your organizations into organizational hierarchies for reporting purposes and for system access control.

OSSWA Oracle Self Service Web Applications.

OTM Oracle Training Management.

P

Pattern A pattern comprises a sequence of time units that are repeated at a specified frequency. Oracle SSP / SMP uses SSP qualifying patterns to determine employees entitlement to Statutory Sick Pay (SSP).

Pattern Time Units A sequence of time units specifies a repeating pattern. Each time unit specifies a time period of hours, days or weeks.

Pay Scale A set of progression points that can be related to one or more rates of pay. Employee's are placed on a particular point on the scale according to their grade and, usually, work experience. See also: *Grade Scale*

Payment Type There are three standard payment types for paying employees: check, cash and direct deposit. You can define your own payment methods corresponding to these types.

Payroll A group of employees that Oracle Payroll processes together with the same processing frequency, for example, weekly, monthly or bimonthly. Within a Business Group, you can set up as many payrolls as you need.

People List An SSHR line manager utility used to locate an employee.

Performance (within Assessment) An expectation of "normal" performance of a competence over a given period. For example, a person may exceed performance expectation in the communication competence. See also: *Proficiency (within Assessment), Competence, Assessment*

Period of Incapacity for Work (PIW) In the UK, this is a period of sickness that lasts four or more days in a row, and is the minimum amount of sickness for which Statutory Sick Pay can be paid. If a PIW is separated by less then the linking interval, a linked PIW is formed and the two PIWs are treated as one.

Period Type A time division in a budgetary calendar, such as week, month, or quarter.

Person Search An SSHR function which enables a manager to search for a person. There are two types of search, Simple and Advanced.

Person Type There are eight system person types in Oracle HRMS. Seven of these are combinations of employees, ex–employees, applicants, and ex–applicants. The eighth category is 'External'. You can create your own user person types based on the eight system types.

Personal Tax Credits Return (TD1) A Revenue Canada form which each employee must complete. Used by the employee to reduce his or her taxable income at source by claiming eligible credits and also provides payroll with such important information as current address, birth date, and SIN. These credits determine the amount to withhold from the employee's wages for federal / provincial taxes.

Plan Design The functional area that allows you to set up your benefits programs and plans. This process involves defining the rules which govern eligibility, available options, pricing, plan years, third party administrators, tax impacts, plan assets, distribution options, required reporting, and communications.

Plan Sponsor The legal entity or business responsible for funding and administering a benefits plan. Generally synonymous with employer.

Position A specific role within the Business Group derived from an organization and a job. For example, you may have a position of Shipping Clerk associated with the organization Shipping and the job Clerk.

Predefined Components Some elements and balances, all primary element classifications and some secondary classifications are defined by Oracle Payroll to meet legislative requirements, and are supplied to users with the product. You cannot delete these predefined components.

Professional Information An SSHR function which allows an employee to maintain their own professional details or a line manager to maintain their direct reports professional details.

Proficiency (within Assessment) The perceived level of expertise of a person in a competence, in the opinion of the assessor, over a given period. For example, a person may demonstrate the communication competence at Expert level. See also: *Performance (within Assessment), Competence, Assessment*

Proficiency Level A system for expressing and measuring how a competence is exhibited in the work context. See also: *Behavioral Indicators.*

Progression Point A pay scale is calibrated in progression points, which form a sequence for the progression of employees up the pay scale. See also: *Pay Scale*

Provincial/Territorial Employment Standards Acts In Canada, these are laws covering minimum wages, hours of work, overtime, child labour, maternity, vacation, public / general holidays, parental and adoption leave, etc., for employees regulated by provincial / territorial legislation.

Provincial Health Number In Canada, this is the account number of the provincially administered health care plan that the employer would use to make remittances. There would be a unique number for each of the provincially controlled plans i.e. EHT, Quebec HSF, etc.

PTO Accrual Plan A benefit in which employees enroll to entitle them to accrue and take paid time off. The purpose of absences allowed under the plan, who can enroll, how much time accrues, when the time must be used, and other rules are defined for the plan.

Q

QPP (See Canada / Quebec Pension Plan)

Qualification Type An identified qualification method of achieving proficiency in a competence, such as an award, educational qualification, a license or a test. See also: *Competence*

Qualifying Days In the UK, these are days on which Statutory Sick Pay (SSP) can be paid, and the only days that count as waiting days. Qualifying days are normally work days, but other days may be agreed.

Qualifying Pattern See: *SSP Qualifying Pattern*

Qualifying Week In the UK, this is the week during pregnancy that is used as the basis for the qualifying rules for Statutory Maternity Pay (SMP). The date of the qualifying week is fifteen weeks before the expected week of confinement and an employee must have been continuously employed for at least 26 weeks continuing into the qualifying week to be entitled to SMP.

Quebec Business Number In Canada, this is the employer's account number with the Ministere du Revenu du Quebec, also known as the Quebec Identification number. It consists of 15 digits, the first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

Questionnaire An SSHR function which records the results of an appraisal.

QuickPaint Report A method of reporting on employee and applicant assignment information. You can select items of information, paint them on a report layout, add explanatory text, and save the report definition to run whenever you want. See also: *Assignment Set*

R

Rates A set of values for employee grades or progression points. For example, you can define salary rates and overtime rates.

Rating Scale Used to describe an enterprise's competencies in a general way. You do not hold the proficiency level at the competence level. See also: *Proficiency Level*

Record of Employment (ROE) A Human Resources Development Canada form that must be completed by an employer whenever an interruption of earnings occurs for any employee. This form is necessary to claim Employment Insurance benefits.

Recruitment Activity An event or program to attract applications for employment. Newspaper advertisements, career fairs and recruitment evenings are all examples of recruitment activities. You can group several recruitment activities together within an overall activity.

Recurring Elements Elements that process regularly at a predefined frequency. Recurring element entries exist from the time you create them until you delete them, or the employee ceases to be eligible for the element. Recurring elements can have standard links. See also: *Nonrecurring Elements, Standard Link*

Region A collection of logically related fields in a window, set apart from other fields by a rectangular box or a horizontal line across the window. See also: *Block, Field*

Registered Pension Plan (RPP) This is a pension plan that has been registered with Revenue Canada. It is a plan where funds are set aside by an employer, an employee, or both to provide a pension to employees when they retire. Employee contributions are generally exempt from tax.

Registered Retirement Savings Plan (RRSP) This is an individual retirement savings plan that has been registered with Revenue Canada. Usually, contributions to the RRSP, and any income earned within the RRSP, is exempt from tax.

Report Parameters Inputs you make when submitting a report to control the sorting, formatting, selection, and summarizing of information in the report.

Report Set A group of reports and concurrent processes that you specify to run together.

Requisition The statement of a requirement for a vacancy or group of vacancies.

Request Groups A list of reports and processes that can be submitted by holders of a particular responsibility. See also: *Responsibility*

Residual The amount of unused paid time off entitlement an employee loses at the end of an accrual term. Typically employees can carry over unused time, up to a maximum, but they lose any residual time that exceeds this limit. See also: *Carry Over*

Responsibility A level of authority in an application. Each responsibility lets you access a specific set of Oracle Applications forms, menus, reports, and data to fulfill your business role. Several users can share a responsibility, and a single user can have multiple responsibilities. See also: *Security Profile, User Profile Options, Request Groups, Security Groups*

Retry Method of correcting a payroll run or other process *before* any post–run processing takes place. The original run results are deleted and the process is run again.

Revenue Canada Department of the Government of Canada which, amongst other responsibilities, administers, adjudicates, and receives remittances for all taxation in Canada including income tax, Employment Insurance premiums, Canada Pension Plan contributions, and the Goods and Services Tax (legislation is currently proposed to revise the name to the Canada Customs and Revenue Agency). In the province of Quebec the equivalent is the Ministere du Revenu du Quebec.

Reviewer (SSHR) A person invited by an appraising manager to add review comments to an appraisal.

Reversal Method of correcting payroll runs or QuickPay runs *after* post–run processing has taken place. The system replaces positive run result values with negative ones, and negative run result values with positive ones. Both old and new values remain on the database.

Rollback Method of removing a payroll run or other process *before* any post–run processing takes place. All assignments and run results are deleted.

S

Search by Date An SSHR sub–function used to search for a Person by Hire date, Application date, Job posting date or search by a Training event date.

Salary Basis The period of time for which an employee's salary is quoted, such as hourly or annually. Defines a group of employees assigned to the same salary basis and receiving the same salary element.

Scheduled Enrollment A benefits plan enrollment that takes place during a predefined enrollment period, such as an open enrollment. Scheduled enrollments can be administrative, open, or unrestricted.

Security Group Security groups enable HRMS users to partition data by Business Group. Only used for Cross Business Group Responsibility security. See also: *Responsibility, Security Profile, User Profile Options*

Security Profile Security profiles control access to organizations, positions and employee and applicant records within the Business Group. System administrators use them in defining users' responsibilities. See also: *Responsibility*

Self Appraisal Part of the SSHR Appraisal function. This is an appraisal undertaken by an employee to rate their own performance and competencies.

SMP See: *Statutory Maternity Pay*

Social Insurance Number (SIN) A unique number provided by Human Resources Development Canada (HRDC) to each person commencing employment in Canada. The number consists of 9 digits in the following format (###–###–###).

Source Deductions Return (TP 1015.3) A Ministere du Revenu du Quebec form which each employee must complete. This form is used by the employee to reduce his or her taxable income at source by claiming eligible credits and also provides payroll with such important information as current address, birth date, and SIN. These credits determine the amount of provincial tax to withhold from the employee's wages.

Special Information Types Categories of personal information, such as skills, that you define in the Personal Analysis key flexfield.

SSHR Oracle Self–Service Human Resources. An HR management system using an intranet and web browser to deliver functionality to employees and their managers.

SSP See: *Statutory Sick Pay*

SSP Qualifying Pattern In the UK, an SSP qualifying pattern is a series of qualifying days that may be repeated weekly, monthly or some other frequency. Each week in a pattern must include at least one qualifying day. Qualifying days are the only days for which Statutory Sick Pay (SSP) can be paid, and you define SSP qualifying patterns for all the employees in your organization so that their entitlement to SSP can be calculated.

Standard Link Recurring elements with standard links have their element entries automatically created for all employees whose assignment components match the link. See also: *Element Link, Recurring Elements*

Statement of Commissions and Expenses for Source Deduction Purposes (TP 1015.R.13.1) A Ministere du Revenu du Quebec form which allows an employee who is paid partly or entirely by commissions to pay a constant percentage of income tax based on his or her estimated commissions for the year, less allowable business expenses.

Statement of Remuneration and Expenses (TD1X) In Canada, the Statement of Remuneration and Expenses allows an employee who is paid partly or entirely by commission to pay a constant percentage of income tax, based on his or her estimated income for the year, less business-related expenses.

Statutory Maternity Pay In the UK, you pay Statutory Maternity Pay (SMP) to female employees who take time off work to have a baby, providing they meet the statutory requirements set out in the legislation for SMP.

Standard HRMS Security The standard security model. Using this security model you must log on as a different user to see a different Business Group. See: *Multiple Responsibility Security*

Statutory Sick Pay In the UK, you pay Statutory Sick Pay (SSP) to employees who are off work for four or more days because they are sick, providing they meet the statutory requirements set out in the legislation for SSP.

Succession Planning An SSHR function which enables a manager to prepare a succession plan.

Suitability Matching An SSHR function which enables a manager to compare and rank a persons competencies.

T

Tabbed Regions Parts of a window that appear in a stack so that only one is visible at any time. You click on the tab of the required region to bring it to the top of the stack.

Task Flows A sequence of windows linked by buttons to take you through the steps required to complete a task, such as hiring a new recruit. System administrators can create task flows to meet the needs of groups of users.

Terminating Employees You terminate an employee when he or she leaves your organization. Information about the employee remains on the system but all current assignments are ended.

Termination Rule Specifies when entries of an element should close down for an employee who leaves your enterprise. You can define that entries end on the employee's actual termination date or remain open until a final processing date.

Tips An SSHR user assistance component that provides information about a field.

U

User Assistance Components SSHR online help comprising tips and instructions.

User Balances Users can create, update and delete their own balances, including dimensions and balance feeds. See also: *Balances*

User Profile Options Features that allow system administrators and users to tailor Oracle HRMS to their exact requirements. See also: *Responsibility, Security Profile*

V

Viewer (SSHR) A person with view only access to an appraisal. An appraising manager or an employee in a 360 Degree Self appraisal can appoint view only access to an appraisal.

W

WCB Account Number In Canada, this is the account number of the provincially administered Worker's Compensation Board that the employer would use to make remittances. There would be a unique number for each of the provincially controlled boards i.e. Workplace Safety & Insurance Board of Ontario, CSST, etc.

Waiting Days In the UK, statutory Sick Pay is not payable for the first three qualifying days in period of incapacity for work (PIW), which are called waiting days. They are not necessarily the same as the first three days of sickness, as waiting days can be carried forward from a previous PIW if the linking interval between the two PIWs is less than 56 days.

Work Choices Also known as Work Preferences, Deployment Factors, or Work Factors. These can affect a person's capacity to be deployed within an enterprise, such willingness to travel or relocate. You can hold work choices at both job and position level, or at person level.

Worker's Compensation Board In Canada, this is a provincially governed legislative body which provides benefits to employees upon injury, disability, or death while performing the duties of the employer. Worker's Compensation Board premiums are paid entirely by the employer.

Workflow An Oracle application which uses charts to manage approval processes and in addition is used in SSHR to configure display values of sections within a web page and instructions.

Work Structures The fundamental definitions of organizations, jobs, positions, grades, payrolls and other employee groups within your enterprise that provide the framework for defining the work assignments of your employees.

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