



PeopleSoft 8.3 Global Payroll for the UK PeopleBook

PeopleSoft 8.3 Global Payroll for the UK PeopleBook

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PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

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About the HRMS PeopleBooks

The HRMS PeopleBooks provide you with the information you will need for implementing and using PeopleSoft Human Resources Management System (HRMS) products.

This section describes information you should know before you begin working with PeopleSoft products and documentation, including PeopleSoft-specific documentation conventions, information specific to the PeopleSoft HRMS product line, how to order additional copies of our documentation, and so on.

Before You Begin

To benefit fully from the information covered in these books, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

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

Because we assume you already know how to navigate the PeopleSoft system, much of the information in these books is not procedural. That is, it does not typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with all the information you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. These books expand on the material covered in PeopleSoft training classes.

PeopleSoft Application Fundamentals for HRMS PeopleBook

The individual HRMS PeopleBooks provide you with implementation and processing information for the individual HRMS products. However, there is additional, essential information describing the setup and design of each HRMS product contained in the companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook*.

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

In the *PeopleSoft Applications Fundamentals for HRMS PeopleBook*, we've included common information pertinent to all applications in the HRMS product line, such as defining general options. If you're upgrading from a previous PeopleSoft release, you may notice that we've

removed some topics or topic headings from the individual application PeopleBooks and consolidated them in this single reference book. You'll now find only application-specific information in your individual application PeopleBooks. This makes the documentation as a whole less redundant. Throughout each PeopleBook, we provide cross-references to *PeopleSoft Application Fundamentals for HRMS* and other PeopleBooks.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection (www4.peoplesoft.com/cc). We post updates, troubleshooting documentation, and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection Web site: <http://www4.peoplesoft.com/cc>

You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of Customer Connection, you can download files to add to your PeopleBook library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM *PeopleSoft 8.3 HRMS PeopleBooks*, SKU HR83PBR0, and *PeopleTools 8.14 PeopleBooks*, SKU PTB814R0.

Note. Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to some of the PeopleBooks listed here.

Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press Web site from the Documentation section

of PeopleSoft Customer Connection. The PeopleSoft Press Web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

Internet	From the main PeopleSoft Internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order. PeopleSoft Internet site: http://www.peoplesoft.com .
Telephone	Contact Consolidated Publishing Incorporated (CPI) at 800 888 3559 .
Email	Email CPI at callcenter@conpub.com .

PeopleBooks Standard Page Element Definitions

Throughout our product documentation, you will encounter fields that are used on many application pages or panels. This section lists the most common fields and provides standard definitions.

Field	Definition
Address 1, Address 2, Address 3	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
As of Date	The last date for which a report or process includes data.
Block (Bloque)	In Spanish addresses, a building or buildings that are close together may be called a Block (Bloque). Include the Block name in the address, if necessary.
Business Unit	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
City	Name of city for address.
Comment(s)	Freeflow text entry that enables you to add comments.
Company	A business organization. For US companies using PeopleSoft Payroll for North America or PeopleSoft Pension Administration, a business unit that has a unique federal Employer Identification Number (EIN) for payroll reporting purposes.

Field	Definition
Country	Country for address. Other address fields will be adjusted to reflect Country choice. Select a country from the list of valid values and press TAB to move through the field. The system automatically displays the appropriate address fields using the standardized address formats previously set up in the Country Table. Enter the appropriate address data in the fields that appear.
County (also Prefecture and Parish)	Name of county (prefecture/parish) for address, if applicable.
Currency Code	The 3-letter code in which the currency is specified.
Description	Freeflow text up to 36 characters that describes what you are defining.
Department	An identification code that represents an organization in a company.
Door (Puerta)	In Spanish addresses, identifies the door name or number.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Email	The email address for a person or organization.
EmplID (employee ID)	Unique identification code for an individual associated with your organization.
Empl Rcd# (Employee Record Number)	A system-assigned number that indicate an employee has more than one record in the system.
Fax (also Fax Number)	The fax number for a person or organization.
Floor (Piso)	In Spanish addresses, identifies the floor name or number.
House	Identifies the type of house.
Initials	Initials of individual.
Language	Language spoken by employee/applicant/non-employee.
Language or Language Code	The language in which you want the field labels and report headings of your reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.
Last Run On	The date that a report or process was last run.
Locality	A tax location within an organization.
Name	Name of individual.

Field	Definition
National ID	Identification code used by countries to track information on their residents for payroll, identification, benefits, and other purposes. For example, for US residents this would be their Social Security Number; for German residents it would be their Social Insurance Number, and for UK residents it would be their National Insurance Code.
Number	The number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.
Phone	The phone number for a person or organization.
Phone Extension	The phone extension number for a person or organization.
Phone Type	Identifies the type of phone number entered in the Telephone field. Valid values are Business, Campus, Cellular, Dormitory, FAX, Home, Other, Pager 1, Pager 2, or Telex.
Post Code (also Postal)	Postal code for address.
Prefix	Prefix for individual (such as Mr., Ms., Mrs., Dr., and so on)
Process Frequency group box	Designates the appropriate frequency in the Process Frequency group box: Once executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run . Always executes the request every time the batch process runs. Don't Run ignores the request when the batch process runs.
Process Monitor	This button takes you to the Process List page, where you can view the status of submitted process requests.
Regulatory Region	A regulatory region can be any region where there are specific laws and regulations that are addressed by functionality in PeopleSoft Human Resources. Many country-specific transactions are driven by regulatory requirements where Regulatory Region is used for transaction processing.
Report ID	Identifies a report.
Report Manager	This button takes you to the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	A request identification that represents a set of selection criteria for a report or process.
Run	This button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.

Field	Definition
Run Control ID	Identifies specific run control settings for a panel.
Run Date	The date that a process was run or a report was generated.
Run Time	The time that a process was run or a report was generated.
SetID	An identification code that represents a set of control table information. SetIDs enable the sharing of a set of control table information across two or more Business Units.
Short Description	Freeflow text up to 15 characters.
Stair (Escalera)	In Spanish addresses, identifies the stair name or number.
State (also Province)	State (Province) for address.
Status	Indicates whether a row in a table is <i>Active</i> or <i>Inactive</i> .
Street Type	Identifies whether an address is a place, street, avenue, road, or so on. Spanish law requires addresses in official documents to include the Street Type.
Telephone (Phone)	The telephone number for a person or organization.
User ID	The system identifier for the individual who generates a transaction.

See Also

PeopleTools Development Tools: Application Designer PeopleBook, “Creating Field Definitions,” Understanding Effective Dates

PeopleSoft Process Scheduler

PeopleBook Standard Group Boxes

The following group boxes and field groupings appear throughout PeopleSoft HRMS. We have documented them once here.

Entering Name Information

The following fields appear wherever you enter or display naming information:

Format Using

Select the country with name format appropriate for this employee. The system will display the appropriate fields for this format in the Person Name group box.

Refresh the Name Field

Click to refresh the Name field after you’ve edited any of the name fields. The system will refresh the name field when you save.

Person Name or Current Name

The following fields appear in the Person Name group box. You will not see all of the fields listed below at any one time. The system displays the fields necessary for the country you select in the Format Using field.

Title	Select a title. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.
Prefix and Name Prefix	Select a Prefix or Name Prefix, if applicable.
Royal Prefix	Select a Royal Prefix, if applicable.
First Name	Enter the employee's official first name.
Preferred First Name	For The Netherlands, enter the employee's preferred first name, if different from the First Name. The system will use the preferred name when you generate form letters or mailing labels for this employee.
Last Name Preference	For the Netherlands, choose this link to provide additional name information for married employees. The Last Name Preference page contains three fields: Last Name Partner, Prefix Partner and Last Name Preference.
Middle	Enter the employee's middle name, if applicable.
Last Name	Enter the employee's official last name.
Suffix	Select a suffix, if applicable.
Second Last Name	For Spanish employees, enter the second surname (mother's surname).
Alternate Character Name	Use this field to enter the employee's name using alternate characters (such as Japanese phonetic characters). Note. You can enter names using Japanese characters with or without a space between the surname and given name. Names using Roman alphanumeric characters require a comma delimiter. Warning! Be sure to select the correct character set on the Installation Table – Alternate Characters page. Using the wrong character set generates an error message.
Royal Suffix	Select the appropriate royal suffix. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.
Name	The system displays the employee's name as it will appear in the system.

Displaying Japanese Names on Pages

Pages that display personal name fields usually display them in First Name, Last Name order. When the country is Japan, however (JPN in the Format Using field), those fields appear in the Last Name, First Name order.

Another difference is that the Name field displays “Last Name[space]First Name,” not “Last Name,First Name”; that is, a space separates the last and first names, not a comma.

Person Name	
Last:	津村
First:	友則
Alternate Character Name:	ツムラトモリ
Name:	津村 友則

Japanese name format on a page

See Also

PeopleSoft Applications Fundamentals for HRMS PeopleBook, “Setting Up PeopleSoft HRMS,” Working With Double-Byte Characters

Entering Address Information

The following fields appear in address group boxes throughout PeopleSoft HRMS. You may not see all of the fields listed below as the system displays only the fields necessary for the country in use. Determine which address fields are required for each country on the Country Table – Address Format page.

Country	Select the country with address format appropriate for this address. The system will display the appropriate fields for this format in the address group box.
Address 1, Address 2, Address 3, and Address 4	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
City	Enter the city.
County	Enter the county, if applicable.
State (State, Province, or other)	Enter the state or province.
Postal	Enter the postal, such as zip or postal code.
Number 1, and Number 2	Enter the number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.

House Type	Enter the house type, if applicable.
Postal Search	Click Postal Search to use international address formats.

Entering or Viewing Pay Components

Amounts Tab

Pay Components - Amounts

Rate Code	Rate codes are IDs for pay components. The system inserts any compensation information associated with this rate code in the compensation grid. Note. If a seniority rate code is inserted as a default value on the Job Data - Compensation page, the values for these rate codes are unavailable for entry.
Seq (sequence)	The sequence number of the rate code if it is used more than once.
Details	Click the Details button to open the Comp Rate Code Secondary Panel page.
Comp Rate , (compensation rate) Currency , and Frequency	The compensation rate, its currency, and the frequency (for example, annually, weekly, or hourly) the comp rate will be paid.
Apply FTE	If selected, the system multiplies the rate code value by the FTE factor for annualization and deannualization. FTE is the percent of full time the employee should normally work in the corresponding job. This field isn't available for Percent rate codes.
Points	The salary points associated with this rate code, if any.
Percent	If the rate code rate type is Percent , the system displays the percent to be applied to the job compensation rate or to a rate code group if you are using rate code groups.
Rate Code Group	A rate code group enables you to be more specific when calculating percentages based components as part of your employee compensation package.

Comp Rate Code Secondary Panel

Comp Rate Code: TSDFLT

Description: Salaried Default

Base Pay **Use Highest Rate**

Default Without Override

Rate Code Type: Flat Amount

Rate Code Class:

Comp Rate Code Secondary Panel

Access this page by clicking the Details link on the Amounts page. Displays additional information about the rate code.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Working With Multiple Components of Pay,” **Defining Rate Codes**

Changes Tab

Pay Components							First	1 of 1	Last
Amounts		Changes		Conversion					
*Rate Code	Seq	Manually Updated	Change Amount	Change Points	Change Percent				
1	0	<input type="checkbox"/>	0.000000		0.000	<input type="button" value="+"/>	<input type="button" value="-"/>		

Pay Components – Changes page

This page displays the change in an employee’s salary.

Manually Updated	The system selects this if you have manually updated the pay components.
Change Amount	The overall change amount to this pay component rate.
Change Points	The overall change amount (in points) to this pay component, if applicable.
Change Percent	The overall percentage change to this pay component, if applicable.

Pay Components							First	1 of 1	Last
Amounts		Changes		Conversion					
*Rate Code	Seq	Source	Default Without Override	Apply FTE	Converted Comp Rate				
1		None	<input type="checkbox"/>	<input type="checkbox"/>		<input style="background-color: yellow;" type="button" value="+"/>	<input style="background-color: yellow;" type="button" value="-"/>		

Pay Components – Conversion

This page displays the conversion rates in an employee's salary.

Source	The system displays the source of the rate code, such as <i>Absorbing Premium</i> , <i>Seniority Pay</i> , <i>Job Code</i> , or <i>Manual</i> .
Default Without Override	Selected if the worker's compensation package cannot be manually updated on the Job Data – Compensation page.
Apply FTE	Indicates if the converted rate code value will be multiplied by the FTE factor for annualization and deannualization.
Converted Comp Rate	Displays the converted compensation rate for this pay component. The system converts all base pay components to the Job currency and compensation frequency.

Required Fields on Pages

When you see a field on a page with an asterisk (*) preceding the field name, it means the field is required. You can not save a page without entering data into all of the required fields on a page.

*Description:	<input type="text" value="This is a required field"/>
----------------------	---

Example of a required field label

In some unique instances a field may be required even though there is no asterisk preceding the field name. In such cases, you will be prompted to enter data in these fields before saving the page.

Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

monospace font

Indicates PeopleCode.

Bold	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold). We also use boldface when we refer to navigational paths, menu names, or process actions (such as Save and Run).
<i>Italics</i>	Indicates a PeopleSoft or other book-length publication. We also use italics for <i>emphasis</i> and to indicate specific field values. When we cite a field value under the page on which it appears we use this style: <i>field value</i> . We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>0</i> , not the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
See Also	PeopleBooks provide cross-references under the heading “See Also.” Capitalized titles in italics indicate the title of a PeopleBook; titles in quotes indicate the title of a chapter; titles in normal font refer to sections within the PeopleBook. Here's an example:

See Also

About These HRMS PeopleBooks, PeopleSoft 8.3 HRMS PeopleBooks Preface

Note. Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!**, the note is crucial and includes information that concerns what you need to do for the system to function properly.

Warning! Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Process Introductory Table

In the documentation, each business process in the application is accompanied by an introductory table with pertinent information about the pages used in the process.

Page	System Name	Navigation	Usage
Name of the page.	Gives the system name of the page as specified in the PeopleTools Application Designer. For example, the system name of the Detail Calendar panel is DETAIL_CALENDAR1.	Provides the path for accessing the page.	Describes how you would use the page.

USF U.S. Federal Government Functionality

Any functionality that is specific to the U.S. Federal Government sector will be designated by a USF marker. Most often this will appear at the beginning of a section heading (such as with this section), but the USF designation might also appear in a note or within text, if appropriate.

E&G Education and Government Functionality

Any functionality that is specific to the Education and Government sector will be designated by an E&G marker. Most often this will appear at the beginning of a section heading (such as with this section), but the E&G designation might also appear in a note or within text, if appropriate.

Local Country Functionality

Any functionality that is specific to an individual country will be designated by the three-character ISO code for that country. For example, functionality specific to Germany would be indicated by a DEU designation at the beginning of a section heading. Most often this will appear at the beginning of a section heading (such as with this section), but the country designation might also appear in a Note or within text, if appropriate.

Comments and Suggestions

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

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

Or send comments by email to the authors of the PeopleSoft documentation at:

DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

CHAPTER 1

About the PeopleSoft 8.3 Global Payroll for the UK PeopleBook

This book provides you with the information you will need for implementing and using PeopleSoft Global Payroll for the UK.

This preface explains how to use the documentation for PeopleSoft Global Payroll for the UK. General information you should know before you begin using PeopleSoft documentation is presented in About These HRMS PeopleBooks. It provides information about the following topics:

- Using related documentation such as the PeopleSoft 8.3 Application Fundamentals for HRMS PeopleBook.
- Ordering documentation on the Internet, on CD-ROM, and in hardcopy.
- PeopleBooks standard page element definitions.
- Required fields on pages.
- Typographical conventions and visual clues in the documentation.
- Process introductory table explanation.
- U.S. Federal Government functionality designation within the documentation
- Education and Government functionality designation within the documentation
- Local country functionality designation within the documentation
- Comments and suggestions about the documentation.

Note. We strongly recommend that you read About These HRMS PeopleBooks. In particular, the PeopleSoft Application Fundamentals section lists where you can find information about topics that apply to many PeopleSoft applications across the HRMS product line. For example, you can find information about setting up control tables, administering security, and setting language and currency preferences in the *PeopleSoft 8.3 Application Fundamentals for HRMS PeopleBook*.

See Also

PeopleSoft Global Payroll PeopleBook, “Preface”, Understanding the Documentation

UK Global Payroll Standard Page Element Definitions

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

Field	Definition
Calendar Run ID	Identifies a grouping of calendars to be processed at the same time.
Department	An identification code that represents an organisation in a company.
Effective Sequence	If you make multiple changes to data on the same date, the Effective Sequence determines the latest change. The higher the number of the Effective Sequence , the more recent the change.
Employee	The name of an individual associated with your organisation.
Employee Status	Displays an employee's status within your organisation. You define this in the job table. Valid values are A (Active), D (Deceased), L (Leave of Absence), P (Leave with Pay), Q (Retired with Pay), S (Suspended), T (Terminated), U (Terminated without Pay), V (Terminated Pension Pay Out), W (Short Work Break), X (Retired Pension Administration).
End Date	The end date for which a report or process includes data.
Hire Date	The date that an employee is hired.
Job Code	Defines an employee's role within an organisation.
Location	The office where a company is located.
Start Date	The start date for which a report or process includes data.
Valid From	The date from when a change in data applies.
Valid To	The end data for which a change in data applies.

Other UK Terms

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

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

See Also

PeopleSoft Global Payroll PeopleBook, “Preface”, PeopleBooks Standard Page Element Definitions

PeopleSoft HRMS PeopleBooks Preface, “About These HRMS PeopleBooks”

CHAPTER 2

Understanding PeopleSoft Delivered Elements for the UK

PeopleSoft Global Payroll for the UK delivers numerous elements and rules needed to run your payroll system. Some of these rules are specifically designed to meet legal requirements, while others support common or “customary” payroll practices.

This chapter provides an overview of how to:

- Understand how UK delivered elements were created.
- Understand element ownership and maintenance.
- View delivered elements for the UK.

Understanding How UK Elements Were Created

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

The core application has the following characteristics:

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

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

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

Country extensions have the following characteristics:

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

Understanding Element Ownership and Maintenance

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

Understanding Ownership in PeopleSoft Global Payroll

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

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

Understanding Element Ownership in PeopleSoft Global Payroll for the UK

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

Element Type	Ownership	Exceptions
Earnings	PeopleSoft (PS) Delivered/Maintained	Base Salary and Base Salary for AFB.
Deductions	PS Delivered/Not Maintained	Earning Arrestment Deduction

Element Type	Ownership	Exceptions
Variables	PS Delivered/Not Maintained	Values that cannot be changed without impacting the calculation.
Bracket	PS Delivered/Not Maintained	If the customer can't change values, they are defined as PS Delivered/Maintained.
Accumulators	PS Delivered/Not Maintained for segment accumulators; otherwise, PS Delivered/Maintained.	In general, the nonsegment base accumulators are maintained because customers can modify the funding base segment accumulators. However, the following nonsegment accumulators are not PS Delivered/Maintained: <ul style="list-style-type: none"> • Accumulators for loans and garnishments. • Generic accumulators. • Accumulators for benefits in kind.
Element Group	PS Delivered/Not Maintained	None
Process List	PS Delivered/Not Maintained	None
Section	PS Delivered/Not Maintained	None
Formula	PS Delivered/Maintained	<p>Exceptions if the rule is not strictly legal follow:</p> <ol style="list-style-type: none"> 1. Formulas used to create conditional sections in a process list and generation control formulas are not maintained. <p>Note. To enable you to choose when and how elements are triggered, generation control formulas and formulas used to create conditional sections are defined as PS Delivered/Not Maintained.</p> <ol style="list-style-type: none"> 2. "Situation" formulas are used to manage specific contracts and are not maintained. <p>Note. Situation formulas are used to control how human resources fields are used in payroll processing. To enable you to determine how to use these fields, situation formulas are defined as PS Delivered/Not Maintained.</p> <ol style="list-style-type: none"> 3. Most generic formulas are not maintained (except legal rules and specific process formulas). <p>Note. Generic formulas are developed as part of the country setup feature and carry the prefix GEN.</p>

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

See also

PeopleSoft Global Payroll PeopleBook, "Defining General Element Information," Defining an Element Name (GP_PIN)

“Setting Up PeopleSoft Global Payroll for the UK”

Viewing Delivered Elements for the UK

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

See Also

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

CHAPTER 3

Setting Up PeopleSoft Global Payroll for the UK

This chapter provides an overview of how to:

- Define your defaults.
- Integrate PeopleSoft Human Resources and PeopleSoft Global Payroll.
- Set up core tables.
- Set up report profiles for the UK.

Initial Setup: Defining Your Defaults

Before you define information in PeopleSoft Global Payroll for the UK, you must define your defaults on:

- The Installation Table component.
- The Primary Permission List Preferences component.
- The Language Preferences page.

Defining the Installation Table

When you first install PeopleSoft HRMS, you must complete the Installation Table component to specify various defaults for your particular implementation of the system. The Installation Table component consists of:

- Products page: Indicate the products that you're installing, such as PeopleSoft Global Payroll.
- Country Specific page: Enter country-specific installation information.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Implementation Defaults"

Defining Primary Permission List Preferences

In PeopleSoft Human Resources, use the Primary Permission List Preferences component to set predefined tableset sharing, system-wide defaults, and settings for each of your primary permission lists. Based on the default values that you indicate for the options on these pages, such as business unit, setID, currency, country, and/or company code, when an operator logs in to PeopleSoft HRMS, the system defaults the values you specified.

- Use the Primary Permission List Preferences – Defaults page to define your company, country, and currencies.
- Use the Primary Permission List Preferences – Settings page to define your payroll system.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Primary Permission List Preferences"

Defining Language Preferences

PeopleSoft has built-in language preference capabilities. Regardless of your system's base language, you can view your PeopleSoft application in any supported language. Set your language preference using either:

- The Language Preferences page.
- The International Preferences page.

View a foreign language sign-on page for each language supported by the system. Ensure that your browser accepts the language you want to use. Once setup is established, select the Language Name icon to view the sign-on page in a given language. The language you select on the Language Preference page determines the language in which the whole application appears on your browser.

Once you log in to a PeopleSoft application, change your preferred language at any time during your session on the International Preferences page. If you change your preferred language on this page, the language code isn't written to the database. It is only stored in PeopleTools memory for the duration of the current logon.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Language Preferences"

Integrating PeopleSoft Human Resources and Global Payroll

PeopleSoft Human Resources and Global Payroll are fully integrated. For example, instead of entering employee information, such as job data and personal data in PeopleSoft Global Payroll, the system simply uses the employee data that you already entered in PeopleSoft

Human Resources. Similarly, you need to enter information about your company, departments, and pay groups into the system only once.

Setting Up UK Banks and Building Societies

In PeopleSoft Global Payroll for the UK, you must set up every bank or building society your organisation deals with during the course of business. This information is stored in the BANK_EC_TBL and BANK_BRANCH_TBL tables. A third table, PYE_BANKACCT, stores details of your workers' bank and building society accounts.

See Also

PeopleSoft HRMS Application Fundamentals PeopleBook, “Setting Up Banks and Bank Branches”

PeopleSoft Global Payroll PeopleBook, “Understanding Banking”

Understanding Currency in PeopleSoft Global Payroll

Understanding currency in Global Payroll is a two-part process.

To use multiple currencies within PeopleSoft Global Payroll, you must first set up and maintain the following:

- Currency Code table.
- Currency Rate Type table.
- Currency Exchange Rate table.

You must also define the currency code and the currency rate type on the Primary Permission List Preferences – Defaults page.

Note. PeopleSoft Global Payroll is designed to meet the changing currency requirements of the European Monetary Union (EMU). The system supports all currencies and enables multiple currency conversions. This flexibility ensures that as the EMU regulations change, you can still meet your needs.

Once you've set up your currency rate codes, rate types, and exchange rates, you can use them to control your input and output amounts.

PeopleSoft Global Payroll uses a two-tiered approach to currency codes:

- Pay entity level.
- Element definition level.

All employees are assigned to pay groups. Each pay group is assigned to one pay entity. The currency entered on the Pay Entity - Processing Details Page in the core application affects all

pay groups assigned to that pay entity. All processing for all employees associated with a pay entity occurs in the pay entity currency. The pay entity currency is also referred to as the processing currency in PeopleSoft Global Payroll.

Online Currency Defaults

When defining a monetary type of element, such as an earnings or deduction, you must specify a currency code for any field with a monetary format.

Currency can default from the primary permission list preference, element definition, or pay entity.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, Working With Currencies

PeopleSoft Global Payroll PeopleBook, “Understanding the Core Application Architecture,” Using Multiple Currencies

PeopleSoft Global Payroll PeopleBook, Online Currency Defaults

Setting Up Core Tables

You must first define several tables in the core application, including pay entities and pay groups.

See Also

PeopleSoft Global Payroll PeopleBook, Defining Pay Groups

PeopleSoft Global Payroll PeopleBook, Defining Pay Entities

Understanding Retro Setup in PeopleSoft Global Payroll

In the core application, you must define the default retro method—either forwarding or corrective—for processing retroactivity. There can only be one default method per country, but you can override this method if required.

See Also

PeopleSoft Global Payroll PeopleBook, Defining Retroactive Processing

Understanding Triggers for PeopleSoft Global Payroll for the UK

In PeopleSoft Global Payroll, the mechanism used to detect online changes to data that should result in some type of system action is called a *trigger*. Examples of common data changes

that might use triggers are the hiring of a new payee, a change in pay rate, and a change in job location. There are three types of triggers: iterative, retro, and segmentation.

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

Record Name	Trigger Type	Trig. Eff. Date Type	Trigger Event ID	Fieldname	Value Based?	Value
GP ABS EVENT	Iterative	Effdt	KRETRO			
GP ABS EVENT	Retro	Begin-End Date				
GPGB ABS EVT JR	Iterative	Effdt	KRETRO			
GPGB ABS EVT JR	Retro	Begin-End Date				
JOB	Iterative	Effdt	KRETRO	COMPRATE		
JOB	Retro	Effdt				
JOB	Segmentation	Effdt				

See Also

PeopleSoft Global Payroll PeopleBook, Setting Up Triggers

Additional Setup for PeopleSoft Global Payroll for the UK

To link PeopleSoft Global Payroll for the UK with the core application, you must also:

- Assign a payroll system and a pay group to employees.
- Assign a tax year, tax period, and run type.

Assigning a Payroll System and a Pay Group to Employees

Assign a payroll system and a pay group to each employee. On the Payroll page, select PeopleSoft Global Payroll as your payroll system.

Select the pay group that you want to assign to the employee, and use the pay group values for Eligibility Group, Exchange Rate Type, and Use Rate As Of, unless you want to override them at employee level.

Assigning a Tax Year, Tax Period, and Run Type

On the Overrides page, for each calendar you establish, you must include the following three elements: TAX VR PERIOD, TAX VR BGN YR, and GBR VR RUN TYPE.

For TAX VR PERIOD, set the numeric value of the current tax period. For TAX VR BGN YR, set the value equal to the year in which the tax year began. For GBR VR RUN TYPE, enter the run type you require: either REG (for regular) or SUP (for supplemental). Doing so links processing with the tax year, tax period, and run type. These variables are retrieved to get data for payslips, reports, and so on.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce,” Entering Employee Payroll Processing Data

PeopleSoft Global Payroll PeopleBook, Using Calendars

Setting Up Report Profiles

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

See Also

“Appendix: PeopleSoft Global Payroll for UK Reports,” Appendix: PeopleSoft Global Payroll for the UK Reports

Pages Used to Set up Report Profiles

Page Name	Object Name	Navigation	Usage
Report Profile	GPGB_PROFILE_PNL	Global Payroll United Kingdom, Define Payroll Setup (GBR), Setup, Report Profile	Create a profile for a user. This profile is then used in the Profile Report, which displays exactly the information that user required. For example, you may have a payroll clerk with the user ID JBrown who wants to see information about only overtime payments. Create a profile for this user to include only the information required. When you run the Profile Report, only this information is reported.

Creating User Profiles

Access the Report Profile page.

Report Profile

User ID: GPGBR

Profile Content View All First 1 of 1 Last

Description: + -

Element Order	Element Description	*Entry Type	*Element Name
1	10	Reg Pay	Earnings <input type="text" value="GBR ER REGPY"/> 🔍 + -

Report Profile page

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

CHAPTER 4

Setting Up Overtime Payments for the UK

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

This chapter provides an overview of how to:

- Enter overtime payments.
- Review delivered overtime earnings.

Entering Overtime Payments

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

Page Used to Enter Overtime Data

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Overtime	GPGB_EE_OVERTIME	Global Payroll United Kingdom, Maintain Payroll Data (GBR), Use, Overtime	Enter overtime data for an employee.

Entering Overtime Data

Access the Overtime page.

Overtime

Brown, John ID: GPGBEM001 Empl Rcd#: 0

Business Unit: Sales and Marketing - UK	Hire Date: 10/10/2000
Department: Administration - England	Employee Status: Active
Job Code: Marketing Manager	
Location: Reading - England	

Overtime								View All	First	1-2 of 2	Last
	*Pay Period Date	*Start Date	End Date	*Factor	*Hours	Salary Based	*Overtime Rate	Total			
1	27/10/2000	27/10/2000	30/10/2000	2.00	10.00000	<input checked="" type="checkbox"/>	13.53	270.60	+	-	
2	27/10/2000	01/11/2000	09/11/2000	1.50	5.00000	<input type="checkbox"/>	16.44	123.30	+	-	

Overtime page

Pay Period Date

Enter the pay period date when the overtime is to be paid. This date must be within the start and end date of the pay period.

The value for this field defaults to the current date, which you can override.

Start Date

(Required) Enter a start date of the period when the employee commenced the overtime.

If you select the **Salary Based** check box, the system checks the hourly rate that applied at that time, even if the rate has since changed.

End Date

(Optional) Enter the last day of the period of overtime that the employee worked. The data that you enter here is used for informational purposes.

Note. The start and end dates provide you with information about when the overtime was worked.

Factor

Enter the factor by which overtime is calculated. .

Hours

Enter the number of hours of overtime that an employee has worked during the period that you specified in the Start Date and End Date fields.

Salary Based

Each employee has an hourly rate that is calculated by the system. Select the Salary Based check box if you want to calculate the overtime at this hourly rate.

Overtime Rate

Enter the rate at which overtime is paid. If you select Salary Based, the system automatically enters the overtime rate and makes the field unavailable for entry.

Note. If you make subsequent changes to the hourly rate on the Job Data – Compensation page, the overtime rate that you enter here prevails unless you return to the Overtime page and update the Overtime Rate field.

Total The system automatically calculates the total gross amount of overtime that an employee is paid. This data is for information only because the actual amount due to the employee is calculated during the payroll process.

See Also

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

Viewing Delivered Overtime Earnings

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

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

See Also

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

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

CHAPTER 5

Setting Up Employee Loans for the UK

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

Note. You can process up to three employee loans per employee per pay period. If you want to process additional loans per pay period, set this up during implementation of PeopleSoft Global Payroll for the UK.

This chapter provides an overview of how to:

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

Entering Employee Loan Repayment Data

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

Page Used to Enter Employee Loan Repayments

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Employee Loans	GPGB_EE_LOANS	Global Payroll United Kingdom, Maintain Payroll Data (GBR), Use, Employee Loans	Enter loan data for an employee.

Entering Employee Loan Data

Access the Employee Loans page.

Employee Loans

Hopkins, Dewi ID: KG0002 Empl Rcd#: 0

Business Unit: Sales and Marketing - UK **Hire Date:** 01/11/1990

Department: Sales and Marketing - Wales **Employee Status:** Active

Job Code: Sales Manager

Location: Cardiff - Wales

Employee Loans View All First 4 of 3 Last

ID	*Start Date	Priority	Loan Amount	Method	Periods	Repayment Amount	Repaid (Y/N)
1 123	07/16/2001	1	250.00	A		50.00	<input checked="" type="checkbox"/>
2 ABC	07/30/2001	3	100.00	A		10.00	<input type="checkbox"/>
3 XYZ	07/24/2001	2	200.00	P	5		<input type="checkbox"/>

Employee Loans page

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

Method	Displayed Field	Hidden Field
A: Repay Fixed Amount Per Period	Repayment Amount	Periods
P: Repay Over No. of Periods (P: repay over number of periods)	Periods	Repayment Amount

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

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

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

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

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

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

Processing Multiple Employee Loans

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

See Also

PeopleSoft Global Payroll PeopleBook, "Payroll Processing," Viewing Results by Calendar

Viewing Delivered Employee Loan Deductions

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

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

See Also

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

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

CHAPTER 6

Understanding Court Orders and Student Loans

This chapter provides an overview of:

- Court orders.
- Student loans.
- Court order/student loan deductions.

Overview of Court Orders and Student Loans

In the UK, there is legislation that if an employee is issued with an order from a court or other government agency or if an employee took out a student loan after August 1998, an employer must deduct money from that employee's earnings and return it to the relevant authority. Employers face penalties for not complying with such orders.

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

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

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

- England and Wales.
- Scotland.
- Northern Ireland.

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

Note. Do not worry about the sequence in which student loans and/or court orders must be paid. PeopleSoft Global Payroll for the UK automatically places them in the correct order.

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

Pages Used to Enter Statutory Information for Employees With Court Orders

Page Name	Object Name	Navigation	Usage
Court Orders	GPGB_EE_CO	Global Payroll United Kingdom, Maintain Payroll Data (GBR), Use, Court Orders	Enter statutory information about an employee who has been issued with an order from a court or other government agency.

Court Orders Page

Access the Court Orders page.

Court Orders

Brown, John Employee ID: GPGBEM001

First 1 of 1 Last

*Region: England And Wales *Sequencing: Page Order

*Order Type	Normal Deduction Amount	Protected Earnings	Amount Payable	Fee	Court Order Reference	*Start Date	Stop Date	*Active Flag
DEO	30.00	100.00		<input checked="" type="checkbox"/>	1115	03/10/2000	31/10/2002	Active
AEP	10	100	20	<input checked="" type="checkbox"/>	6421	22/11/2000	31/10/2000	Active

Court Orders page

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

Region	Select the country in which the court order was issued.
Sequencing	Select the type of sequencing that you want to use. Valid values are: System: If you select this option, when you save your information, the system automatically processes the court orders in the correct sequence. Manual: If you select this option, when you save your information, the system processes the court orders in the sequence that they appear on the screen.
Order Type	Specify the type of court order that must be paid, as notified by the court issuing the order. The order type that is available depends on the region in which the order was issued. Note. The type of order that you select affects whether the Normal Deduction Amount , Protected Earnings , and Amount Payable fields appear. Order Types in England and Wales are AEN (Attachment Non-Priority), AEP (Attachment – Priority), CCA (Community Charge AEO), CTA (Council Tax AEO), DEO (Deduction from Earnings Order). Order Types in Northern Ireland are AEN (Attachment Non-Priority), AEP (Attachment – Priority), and DEO (Deduction from Earnings Order). Order Types in Scotland are CAO (Conjoined Order), CMA (Current Maintenance Arrestment), DEO (Deduction from Earnings Order), and EAO (Earnings Arrestment Order).
Normal Deduction Amount	Enter the normal deduction amount as stated by the issuing authority.
Protected Earnings	Enter the protected earnings as stated by the issuing authority.
Amount Payable	Enter the initial amount of debt or fines that the employee owes. Note. Although the amount of initial debt remains constant on this page, the system reduces it by the amount of payments made each period.
Fee	Employers can charge employees with a fee for processing court orders. Employers in England and Wales or Northern Ireland can charge £1.00; in Scotland the fee is 50 pence.
Court Order Reference	Enter the reference for the court order. Use this number in all correspondence with the court that issued the order.

Start Date	Enter the date when deductions are to start
Stop Date	Enter the date when deductions are to stop. The court or relevant authority informs you when you should stop making deductions from an employee's earnings.
Active Flag	Select <i>Active</i> in this field if you want to process the court order. If you do not, the system does not process the court order.

Overview of Student Loans

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

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

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

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

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

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

See Also

“Appendix: PeopleSoft Global Payroll for the UK Reports”

Page Used to Enter Student Loan Information

Page Name	Object Name	Navigation	Usage
Student Loans	GPGB_EE_STLOAN	Global Payroll United Kingdom, Maintain Payroll Data (GBR), Use, Student Loans	Enter student loan data for an employee.

Entering Student Loan Information

Access the Student Loans page.

Student Loans

Brown, John ID: GPGBEM001 Empl Rcd#: 0

Business Unit: Sales and Marketing - UK **Hire Date:** 10/10/2000
Department: Administration - England **Employee Status:** Active
Job Code: Marketing Manager
Location: Reading - England

Student Loans View All First 1 of 1 Last

	*Start Date	End Date	Student Loan Reference	
1	10/10/2000	31/10/2000	From P45 details	+ -

Student Loans page

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

Viewing Delivered Court Order/Student Loan Deductions

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

Element Name	Description
CO DD AEN1	AEN1 deduction
CO DD AEN2	AEN2 deduction
CO DD AEN3	AEN3 deduction
CO DD AENF1	Deduction fee for AEN1
CO DD AENF2	Deduction fee for AEN2
CO DD AENF3	Deduction fee for AEN3

Element Name	Description
CO DD AEP1 R	AEP1 deduction
CO DD AEP2 R	AEP2 deduction
CO DD AEP3 R	AEP3 deduction
CO DD AEPF1	Deduction fee for AEP1
CO DD AEPF2	Deduction fee for AEP2
CO DD AEPF3	Deduction fee for AEP3
CO DD CAO CM	CMA as part of a CAO
CO DD CAO EA	EAO as part of CAO calculation
CO DD CAO F	CAE deduction fee
CO DD CCAA1	CCAA deduction 1
CO DD CCAA2	CCAA deduction 2
CO DD CCAA3	CCAA deduction 3
CO DD CCAAF1	Deduction fee for CCAA1
CO DD CCAAF2	Deduction fee for CCAA2
CO DD CCAAF3	Deduction fee for CCAA3
CO DD CCAP1	CCAP deduction 1
CO DD CCAP2	CCAP deduction 2
CO DD CCAP3	CCAP deduction 3
CO DD CCAPF1	Deduction fee for CCAP1
CO DD CCAPF2	Deduction fee for CCAP2
CO DD CCAPF3	Deduction fee for CCAP3
CO DD CMA	CMA-only deduction
CO DD CMA FE	CMA fee deduction
CO DD CTA1 R	CTA deduction 1
CO DD CTA2 R	CTA deduction 2
CO DD CTA3 R	CTA deduction 3
CO DD CTAF1	Deduction fee for CTA1
CO DD CTAF2	Deduction fee for CTA2
CO DD CTAF3	Deduction fee for CTA3
CO DD DEO1 R	Deduction for DEO1
CO DD DEO2 R	Deduction for DEO2
CO DD DEO3 R	Deduction for DEO3

Element Name	Description
CO DD DEOF1	Deduction fee for DEO1
CO DD DEOF2	Deduction fee for DEO2
CO DD DEOF3	Deduction fee for DEO3
CO DD EAO	Earning arremstment deduction
CO DD EAO FE	Fee deduction for EA

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

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

See Also

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

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

CHAPTER 7

Defining Statutory Tax and National Insurance Details

This chapter provides an overview of how to:

- Understand statutory tax and national insurance.
- Enter statutory tax and national insurance details.

Understanding Statutory Tax and National Insurance

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

When an employee is hired in PeopleSoft Global Payroll for the UK, the system automatically creates an effective-dated row for the employee's statutory details. If there are subsequent effective-dated job rows inserted for an employee, the system inserts new effective-dated rows of statutory data with the same effective date because there is a sibling relationship between the corresponding JOB, TAX, and NI tables. Similarly, if you insert a new effective-dated row for statutory details, the system creates a corresponding effective-dated row for their job data with an action/reason of *DTA/UKT*. This appears on the Work Location page in PeopleSoft Human Resources.

See Also

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

Entering Statutory Tax and National Insurance Details

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

Pages Used to Enter Statutory Tax and National Insurance Details

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Tax	GPGB_EE_TAX	Global Payroll United Kingdom, Maintain Payroll Data (GBR), Use, Statutory Details	Enter an employee's tax details.
Taxcode Uplift	GPGB_TAXCDE_UPLIFT	Global Payroll United Kingdom, Manage Payroll Process (GBR), Process, Tax Uplift	Change the tax rates associated with specific tax codes.
NI	GPGB_EE_NI	Global Payroll United Kingdom, Maintain Payroll Data (GBR), Use, Statutory Details, NI Details	Enter an employee's National Insurance details.

Entering Employee Tax Details

Access the Tax page.

Tendulkar,Indira		ID: KG0001	Empl Rcd#: 0
Business Unit:	Sales and Marketing - UK	Department:	Sales and Marketing - England
Job Code:	Managing Director	Location:	Reading - England

Tax Details		View All		First		1 of 1		Last	
*Effective Date:	08/27/2001	Previous Employer PAYE ID:		Leave Date of Last Employment:		Previous Employer Pay Period:		Previous week/month indicator:	<input type="checkbox"/>
Notification Source:	P45	Tax Year from P45:		Previous Employer Tax Basis:		P45 Pay to Date:		P45 Tax to Date:	
Scottish Variable	<input type="checkbox"/>	Tax Code:		Previous Tax Code:					
Tax Basis:		P45 - Calendar Group Id:							

Tax page

Notification Source

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

You can also leave this field blank.

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

Notification Source	Fields That Appear
P38S, P6, P7X, P9, P9T, P9X	Scottish Variable
	Tax Code
	Tax Basis
	P45 – Calendar Group Id (contains a value only if the P45 report has been run)
OTH	Scottish Variable
	Tax Code
	Tax Basis
	P45 – Calendar Group Id (contains a value only if the P45 report has been run)
	Notes
P45	Scottish Variable

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

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

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

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

Tax Code Enter the employee's tax code for the current tax year. PeopleSoft has built various validation rules into this field.

Tax Basis Enter the basis on which the employee's *current* employer calculates tax.

P45 – Calendar Group Id If the employee's P45 report has been printed, this field will display the Calendar Group ID containing the calculations on which the P45 was based. If you need to reprint the P45, this field enables you to identify which calculations (identified by Calendar Group ID) were used to create the original P45, so that you can reprint using the same set of results (remember, if the P45 needs to be reprinted, it should be reprinted using the same results used to generate the original report).

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

See Also

“Appendix: PeopleSoft Global Payroll for the UK Reports,” PeopleSoft Global Payroll for UK Reports: A to Z, GPGBP45 - P45 Report

OTH Notification Source

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

P45 Notification Source

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

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

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

P46 Notification Source

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

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

Managing Leavers for Tax Purposes

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

Changing Tax Rates Associated with Specific Tax Codes

Access the TaxCode Uplift page.

Taxcode Uplift page

Report Request Parameters If you want to perform a tax uplift, select *Tax Uplift/Wk 7*; if you want to change all the Week1/Month1 indicators to a cumulative basis for the first processing period in a new tax year, select *Week 1 Month 1*.

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

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

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

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

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

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

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

Entering Employee Statutory National Insurance Details

Access the NI page.

The screenshot shows the 'NI Details' page for employee Tendulkar, Indira (ID: KG0001, Empl Rcd#: 0). The page is divided into several sections:

- Employee Information:** Name (Tendulkar, Indira), ID (KG0001), Empl Rcd#: 0.
- Business Unit:** Sales and Marketing - UK
- Department:** Sales and Marketing - England
- Job Code:** Managing Director
- Location:** Reading - England
- NI Details:**
 - Effective Date: 06/15/2001
 - Multiple Employment?: (with +/- buttons)
 - NI Category Code: (with search icon)
 - NI Approved Pension Scheme:
 - RL Certificate seen?:
 - DEF Certificate seen?:
 - Age Certificate seen?:
- Periods:**
 - NI Frequency: (dropdown)
 - NI Override Period:
- Directors:**
 - Director Indicator:
 - Director Start Date: (calendar icon)
 - Directors NI Calc: (with search icon)
 - Director End Date: (calendar icon)
- CONs:**
 - SCON:
 - ECON:

NI page

NI Details

Multiple Employment?

Select if the employee has multiple jobs, and you want to aggregate National Insurance for each job (for NI calculation purposes).

Note. You must be sure to tick the **Multiple Employment?** flag against each job to aggregate them.

NI Category Code (National Insurance category code)

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

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

Valid values are:

A: Not contracted-out National Insurance contributions.

AA: Not contracted out in appropriate personal pension.

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

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

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

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

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

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

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

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

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

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

NI Approved Pension Scheme (National Insurance approved pension scheme)

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

RL Certificate seen?

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

DEF Certificate seen?

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

Age Certificate seen?

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

Periods

NI Frequency (National Insurance frequency)

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

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

Valid values are:

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

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

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

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

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

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

NI Override Period (National Insurance override period)

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

Directors

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

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

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

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

Managing Starters from an NI Perspective

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

Managing Leavers from an NI Perspective

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

See Also

Entering Employee Statutory National Insurance Details

CHAPTER 8

Setting Up Employee Tax Credits

This chapter provides an overview of:

- Inland Revenue requirements and tax credits.
- How to enter tax credit information.
- Overtime earnings.

Understanding Tax Credits

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

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

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

Entering Tax Credit Information

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

Pages Used to Enter Tax Credit Information

Page Name	Object Name	Navigation	Usage
Tax Credits	GPGB_EE_TAXCRD	Global Payroll United Kingdom, Maintain Payroll Data (GBR), Use, Tax Credits	Record tax credit information for an employee.

Recording Employee Tax Credit Information

Access the Tax Credits page.

Tax Credits

Brown, John ID: GPGBEM001 Empl Rcd#: 0

Business Unit:	Sales and Marketing - UK	Hire Date:	10/10/2000
Department:	Administration - England	Employee Status:	Active
Job Code:	Marketing Manager		
Location:	Reading - England		

Tax Credits View All First 1 of 1 Last

Start Date	End Date	Stop Date	Tax Credit Daily Rate	Tax Credit Reference
1 02/10/2000	31/10/2001	31/10/2001	5	AB

Tax Credits page

Tax Credits

Enter the tax credit data that applies to an employee.

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

Start Date

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

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

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

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

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

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

Tax Credit Daily Rate Enter the daily amount that applies to each calendar day for which you must pay tax credit. The Inland Revenue notifies you of this amount.

Tax Credit Reference Enter any reference that the Inland Revenue uses with reference to this employee's tax credits.

Stopping Tax Credit Payments

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

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

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

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

See Also

“Appendix: PeopleSoft Global Payroll for the UK Reports”

Viewing Delivered Tax Credit Earnings

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

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

See Also

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

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

CHAPTER 9

Setting Up Pension Schemes

This chapter provides an overview of how to:

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

Understanding Pension Schemes

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

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

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

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

Entering Standard and Stakeholders Pension Scheme Data

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

Pages Used to Set Up Pension Schemes

Page Name	Object Name	Navigation	Usage
Pension Details	GPGB_EE_PENSION	Global Payroll United Kingdom, Maintain Payroll Data (GBR), Use, Pension Scheme	Enter standard pension scheme data for an employee.
Stakeholders	GPGB_EE_STKHLD	Global Payroll United Kingdom, Maintain Payroll Data (GBR), Use, Stakeholders	Enter stakeholders pension scheme data for an employee.

Entering Standard Pension Scheme Data

Access the Pension Details page.

Pension Details page

Pension Schemes

- Scheme** Select the type of pension scheme that you require: *AVCI*, *FIXA Fixed Scheme A*, or *PCTB Percentage Scheme B*.
- Employee Percentage** This field is available for entry only if you select either the *Percentage Scheme* or *AVCI* in the Scheme field. Enter the percentage of employee earnings that the employee must pay towards the pension scheme.
- Employer Percentage** This field is available for entry only if you select the *Percentage Scheme B* in the Scheme field. Enter the percentage of employee earnings that the employer must pay towards the pension scheme.
- Employee Amount** This field is available for entry only if you select either the *FIXA Fixed Scheme A* or *AVCI* in the Scheme field. Enter the fixed amount of money that an employee must put towards the pension scheme each pay period.

Employer Amount	Enter the amount of money than an employer must put towards the pension scheme each pay period.
Start Date	Select the start date when the pension scheme is processed.
End Date	(Required) Select the end date when the pension scheme is processed.

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

Entering Stakeholders Pension Scheme Data

Access the Stakeholders page.

Stakeholders

Tendulkar,Indira ID: KG0001 Empl Rcd#: 0

Business Unit:	Sales and Marketing - UK	Hire Date:	02/04/1995
Department:	Sales and Marketing - England	Employee Status:	Active
Job Code:	Managing Director		
Location:	Reading - England		

Pension Schemes View All First 1 of 1 Last

*Scheme	Employee Percentage	Employer Percentage	Employee Amount	Employer Amount	Begin Date	End Date
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Stakeholders page

Pension Schemes

Scheme	Select the type of pension scheme that you require. Valid values are <i>AMT</i> (Fixed Amount Scheme) and <i>PCT</i> (Percentage Scheme).
Employee Percentage	This field is available for entry only if you enter <i>PCT</i> (Percentage Scheme) in the Scheme field. Enter the percentage of employee earnings that the employee must pay towards the pension scheme.
Employer Percentage	This field is available for entry only if you enter <i>PCT</i> (Percentage Scheme) in the Scheme field. Enter the percentage of employee earnings that the employer must pay towards the pension scheme.

Employee Amount	This field is available for entry only if you enter <i>AMT</i> (Amount) in the Scheme field. Enter the fixed amount of money that an employee must put towards the pension scheme each pay period.
Employer Amount	This field is available for entry only if you enter <i>AMT</i> (Amount) in the Scheme field. Enter the amount of money than an employer must put towards the pension scheme each pay period.
Start Date	Select the start date when the pension scheme is processed.
End Date	Select the end date when the pension scheme is processed. The End Date is a mandatory field.

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

Viewing Delivered Pension Scheme Deductions

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

Standard Pension Scheme

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

Stakeholder Pension Scheme

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

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

See Also

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

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

Defining Absence Rules for the UK

This chapter provides an overview of how to:

- Define absences for the UK.
- Set up the Statutory Sick Pay scheme.
- Use Occupational Sick Pay and Occupational Maternity Pay schemes.
- Enter absence events.
- Review additional information regarding Statutory Sick Pay and Statutory Maternity Pay schemes.
- View absence details.
- View delivered absence earnings.

Defining Absence Schemes

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

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

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

Note. This section builds upon the information presented in the Understanding Absences section of *PeopleSoft 8 Global Payroll PeopleBook*. If you have not yet read this information, we recommend that you do so now.

To define an absence for the UK:

1. Define a work schedule in the core application (if you are entering an SSP absence) or enter data on the UK Maternity Leave page in PeopleSoft Human Resources (if you are entering an SMP absence).
2. Define the reasons for an absence on the Absence Reasons page in PeopleSoft Global Payroll for the UK.
3. Record an employee's absence on the Entering Absence Events page in PeopleSoft Global Payroll for the UK.

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

UK Absence Terms

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

SSP (Statutory Sick Pay)	The minimum level of sick pay that you must pay to most employees who are absent from work due to sickness for four or more calendar days in a row.
SMP (Statutory Maternity Pay)	The minimum level of maternity pay to most employees who are absent from work to have a baby. SMP is a weekly payment, and the payment is made in multiples of weeks, regardless of the frequency with which the employee is usually paid. SMP is sometimes paid in a lump sum at the start of the maternity leave period. SMP applies to whole weeks starting on a Sunday through to Saturday. If the employee is ineligible for even one day during a week, then no payment is paid for that week.
OMP	Employers can opt out of paying SMP and provide employees with maternity pay, which would be at least equal to the SMP entitlement.
OSP	Employers can opt out of paying SSP and provide employees with sick pay, which would be at least equal to the SSP entitlement.
EWC (Expected Week of Confinement)	The week when an employee's baby is due. This date is always the Sunday of the week in which the baby is due.
QW (Qualifying Week)	The fifteenth week before the EWC.

PIW (Period of Incapacity for Work)	To qualify for SSP, an employee must be absent due to sickness for four working days or more.
MPP (Maternity Pay Period)	The period of 18 weeks during which SMP can be paid. The MPP can start between the eleventh week before the EWC and the Sunday following the birth. The start of the MPP is affected if the employee is absent with a pregnancy-related illness on or after the beginning of the sixth week before the EWC.

Setting Up SSP

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

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

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

See Also

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

PeopleSoft Global Payroll PeopleBook, “Using Schedules,” Setting Up Shifts

Using OSP and OMP Schemes

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

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

If you prefer to use only the statutory schemes, PeopleSoft provides you with the flexibility to turn off the mapped to take facility. To do this, edit the formula that appears in the

Conditional Formula field on the Day Formula page, and specify whether to map to the relevant occupational absence scheme.

See Also

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

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

Entering Absence Events

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

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

Pages Used to Enter Absence Events

Page Name	Object Name	Navigation	Usage
Absence Reasons	GPGB_ABS_TYPE	Global Payroll United Kingdom, Define Payroll Setup (GBR), Setup, Absence Reasons	Define an absence type and enter absence codes that further define the absence. For example, if you have an employee who is absent from work due to sickness, record the type of sickness: flu, stomach bug, and so on.
Absence Data	GPGB_ABS_EVENT_1	Global Payroll United Kingdom, Maintain Payroll Data (GBR), Use, Absence Entry	Record data about an employee’s absence from work. Before using this page, first set up absence types and absence codes on the Absence Reasons page.

Page Name	Object Name	Navigation	Usage
SSP Disqualification Details	GPGB_ABS_DIS_SE C	To access the SSP Disqualification page, click SSP Disqualification on the Absence Data page.	Record the date when and the reason why an employee is no longer paid SSP.
Notification of Absence	GPGB_NOTIFY_SEC	To access the Notification of Absence page, click Notification of Absence on the Absence Data page.	Record how you were notified of an employee's absence. Use this information for reporting purposes.
Absence Certificate Details	GPGB_ABS_CERT_S EC	To access the Absence Certificate Details page, click Absence Certificate Details on the Absence Data page.	Record the type of certificate supplied by an employee to support the absence. Use this information for reporting purposes.
Process Details	GPGB_ABS_PROC_S EC	To access the Process Details page, click Process Details on the Absence Data page.	Record when the absence was last processed. It also displays the calendar group in which the absence was processed and the date when the absence was last updated. This page is display only and is intended for tracking purposes.
Additional Information	GPGB_ABS_EVENT_ 2	Global Payroll United Kingdom, Maintain Payroll Data (GBR), Use, Absence Entry	Record additional information about an employee's absence.
User Defined Fields	GPGB_ABS_CNFG_S EC	Click the User Defined Fields link on the Additional Information page.	Define the four fields that you can use to enter additional information about an absence.
Override/Adjust Entitlement	GPGB_OVRD_ENT_S EC	Click the Override/Adjust Entitlement link on the Additional Information page.	Change the entitlement for an absence scheme. This applies only to absences that have a <i>per absence entitlement</i> .

Page Name	Object Name	Navigation	Usage
Override Average Earnings	GPGB_ABS_ERNS_SEC	Click the Override Average Earnings link on the Additional Information page.	Override an employee's average earnings. For example, SSP and SMP calculate an employee's average earnings per week. If you have a new employee with no payment history, you may want to override that employee's average earnings to a more realistic amount.
Maternity Dates	GPGB_MAT_SEC	Click the Maternity Dates link on the Additional Information page.	Record data about the EWC and the actual week of confinement.
Override/Adjust Entitlement for Mapped to Scheme	GPGB_OVRD_MAP_SEC	Click the Override/Adjust Entitlement for Mapped to Scheme link on the Additional Information page.	Override entitlement for the scheme to which you mapped on the Day Formula page in the core application. This applies only to absences that have a <i>per absence</i> entitlement. Note. The fields on this page are identical to those on the Override/Adjust Entitlement page.
Comments	GPGB_ABS_EVENT_4	Global Payroll United Kingdom, Maintain Payroll Data (GBR), Use, Absence Entry	Enter any additional comments about an employee's absence.

Entering Absence Reasons

Access the Absence Reasons page.

Absence Reasons

Absence Type:

Description:

Absence Codes View All First ◀ 1-2 of 2 ▶ Last

	Absence Code	Description		
1	<input type="text" value="11"/>	<input type="text" value="Flu"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
2	<input type="text" value="12"/>	<input type="text" value="Stomach bug"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Absence Reasons page

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

Description Enter a **Description** to define the Absence Type.

Absence Codes

Absence Code Enter an **Absence Code** to further define the Absence Type you have created.

Description Enter a **Description** to define the Absence Code.

Recording Employee Absence Data

Access the Absence Data page.

Absence Data		Additional Information		Comments	
Campbell, Elaine		ID: KG0006		Empl Rcd#: 0	
Absence Data		View All		First 1 of 1 Last	
Absence Take: SSP AT1		Statutory Sick Pay		+ -	
*Process Action: Normal		<input type="checkbox"/> Voided		<input checked="" type="checkbox"/> Manager Approved	
Dates		Partial Hours	Or Half Day	Or Apply to All Days	
*Begin Date:	07/23/2001	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	
End Date:	07/23/2001	<input type="text"/>	<input type="checkbox"/>		
Absence Reason			Override Payment		
Absence Type: <input type="text"/>			<input checked="" type="radio"/> Paid		
Absence Code: <input type="text"/>			<input type="radio"/> Unpaid		
Reason: <input type="text"/>			SSP Disqualification		
Notification of Absence		Absence Certificate Details			
Process Detail					

Absence Data page

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

Absence Take

Select the type of absence that you require: *SSP AT1 Statutory Sick Pay*, *SMP AT1 Statutory Maternity Pay*, *OSP AT1 Occupational Sick Pay*, and *OMP AT1 Occupational Maternity Pay*.

Partial Hours

If you enter any partial hours during an employee's absence (including the first, last, or all days), then that day of absence is treated as incomplete for the payment of SSP/SMP; that is, SSP or SMP won't be paid for that day. This applies regardless of the number of hours entered in the Partial Hours field.

Or Half Day

If you select this check box during the absence (the first, last, or all days), then the day of absence is treated as incomplete for the payment of SSP/SMP; that is, SSP or SMP is not paid for that day.

Or Apply to All Days

If you select this check box during the absence (the first, last, or all days), then the day of absence is treated as incomplete for the payment of SSP/SMP; that is, SSP or SMP is not paid for that day.

Absence Type

Select an absence type that you defined on the Absence Reasons page.

Absence Code	Select an absence code that you defined on the Absence Reasons page.
Reason	Enter an additional reason why an employee was absent from work.
Paid	If you are using the OSP/OMP schemes that PeopleSoft provides, the system automatically selects this option so that an absence is paid when it is entered.
Unpaid	If you are using the OSP/OMP schemes that PeopleSoft provides, select this option to override the payment of an absence when it is entered. This field does not affect statutory schemes.
SSP Disqualification	Click to access the SSP Disqualification Details page.
Notification of Absence	Click to access the Notification of Absence page.
Absence Certificate Details	Click to access the Absence Certificate Details page.
Process Details	Click to access the Process Details page.

See Also

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

Recording Dates and Reasons for Disqualification

Access the SSP Disqualification Details page

SSP Disqualification Details

Date of Disqualification:	<input type="text" value="17/10/2000"/> <input type="button" value="By"/>
Reason for Disqualification:	<input type="text" value="Shortterm contract (<=3 months)"/>

SSP Disqualification Details page

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

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

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

Recording Notification of Absences

Access the Notification of Absence page.

Notification of Absence

Notified of Absence By Whom:	Wife	
Date First Notified:	04/09/2000	Time: 08.50

Notification of Absence page

Notified of Absence By Whom	Enter the name or relationship of the person who notified you of the employee's absence.
Date First Notified	Select the date when you were first notified of the employee's absence.
Time	Enter the time when you were notified of the employee's absence.

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

See Also

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

Recording Absence Certificate Details

Access the Absence Certificate Details page.

Absence Certificate Details page

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

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

See Also

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

Entering Process Details

Access the Process Details page.

Process Details page

Calendar Group ID The calendar group ID in which the absence was last processed.

Date of last update The date when the absence was last updated.

Process Date The date when the absence was last processed.

Additional Information Page

Access the Additional Information page.

Absence Data		Additional Information		Comments	
Parker,Joshua		ID:	GB1B003	Empl Rcd#:	0
Absence Data		View All First ◀ 1 of 1 ▶ Last			
Absence Type:	SSP_AT1	SSP Absence Take			
Start Date:	13/09/2000				
End Date:	13/09/2000				
Additional Information					
<input checked="" type="checkbox"/> Doctor Consulted	Consultation Date:	11/09/2000			
<input type="checkbox"/> Work Injury Related	Incident Number:	1			
<input type="checkbox"/> Refer to Occ. Health Auth.					
<input type="checkbox"/> Counselling					
<input type="checkbox"/> Disciplinary					
<input type="checkbox"/> Pregnancy Related Illness					
User Defined Fields Override/Adjust Entitlement Override Average Earnings Maternity Dates Override/Adjust Entitlement for Mapped to Scheme					

Additional Information page

Absence Type

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

Start Date

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

End Date

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

Additional Information

Doctor Consulted

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

Consultation Date

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

Work Related Injury

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

Incident Number

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

Refer to Occ. Health Auth. (refer to occupational health authority)

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

Counseling	Select this check box if it applies to the employee's absence.
Disciplinary	Select this check box if it applies to the employee's absence.
Pregnancy Related Illness	Select this check box if it applies to the employee's absence. Note. According to UK legislation, the start of the MPP is affected if an employee is absent with a pregnancy-related illness on or after the beginning of the sixth week before the EWC.
User Defined Fields	Click to access the User Defined Fields page.
Override/Adjust Entitlement	Click to access the Override/Adjust Entitlement page.
Override Average Earnings	Click to access the Override Average Earnings page.
Maternity Dates	Click to access the Maternity Dates page.
Override/Adjust Entitlement for Mapped to Scheme	Click to access the Override/Adjust Entitlement for Mapped to Scheme page.

See Also

Entering Additional Information About SSP and SMP

Defining Additional Information Fields

Access the User Defined Fields page.

User Defined Fields

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

OK Cancel

User Defined Fields page

User Defined Fields

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

Changing Entitlements for Absence Schemes

Access the Override/Adjust Entitlement page.

Override/Adjust Entitlement

Entitlement:	<input type="text" value="23"/>	Adjustment:	<input type="text"/>
---------------------	---------------------------------	--------------------	----------------------

Override/Adjust Entitlement page

Entitlement

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

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

Adjustment

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

Overriding Employee Average Earnings

Access the Override Average Earnings page.

Override Average Earnings

Statutory Average Earnings:	75
Occupational Average Earnings:	80

Override Average Earnings page

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


Occupational Average Earnings Enter the amount that you wish to apply as the occupational average earnings.


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

Recording EWC Data

Access the Maternity Dates page.

Maternity Dates

Actual Week of Confinement: 

Expected Week of Confinement: 

Maternity Dates page

Actual Week of Confinement

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

Expected Week of Confinement

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

Overriding Entitlement for Schemes Mapped in Core Application

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

Override/Adjust Entitlement for Mapped to Scheme

Entitlement: **Adjustment:**

Override/Adjust Entitlement for Mapped to Scheme page

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

See Also

Changing Entitlements for Absence Schemes

Entering Additional Information About SSP and SMP

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

Processing SMP and Stillbirths

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

Entitlement Condition	Resolution	Comments
Baby is stillborn <i>after</i> the start of the 16 th week prior to the EWC.	SMP must be paid as normal.	It is a statutory requirement that the employee be paid SMP, as for a live birth. You do not have to record details of the stillbirth in PeopleSoft Global Payroll for the UK because SMP is paid as normal.
Baby is stillborn <i>before</i> the 25 th week of pregnancy; that is, baby is stillborn earlier than the 16 th week prior to the EWC.	The employee is not eligible for Statutory Maternity Pay. Clear the Eligible for Maternity Pay Based on Employment Conditions option on the the UK Maternity Leave page in PeopleSoft Human Resources.	If the employee is absent from work, you may want to record this as an SSP absence on the Absence Data page (do not select Pregnancy Related Illness on the Additional Information page). You may also want to make a relevant comment on the Comments page.
		Note. This is a manual procedure; there is no check box to record stillbirths. This decision was based on the fact that stillbirths are an emotive issue and occur relatively infrequently.

See Also

PeopleSoft Global Payroll PeopleBook, “Tracking General Absences,” (GBR) Tracking Maternity and Parental Leave

Additional SSP and SMP Entitlement Conditions

Entitlement Condition	Resolution	Comments
Absence is entered after an employee’s termination date. (SSP)	The system displays a warning on the Absence Data page.	The employee is not paid SSP.
Absence start date is 11 weeks before the EWC. (SMP)	The system displays a warning on the Absence Data page.	The employee is paid SMP as the system assumes that the birth is premature.
An employee is sick on the hire date. (SSP)	The system displays a warning on the Absence Data page.	If you enter an absence, PeopleSoft Global Payroll for the UK assumes that the employee has done some work for the employer and SSP must be paid.

Entitlement Condition	Resolution	Comments
An employee works part of a day during an absence. (SSP and SMP)	None.	SSP is not paid for any part day that an employee has worked.
Average weekly income is less than the LEL. (SSP and SMP)	PeopleSoft Global Payroll for the UK calculates the employee's average earnings and override is included on the page.	If average earnings are below the LEL, SSP and SMP are not paid.
Birth occurs before the date that the employer was notified, or no notification has been given. (SMP)	PeopleSoft Global Payroll for the UK does not pay SMP unless you enter a date in the Form MATB1 Received field on the UK Maternity Leave page in PeopleSoft Human Resources.	The employee must notify the employer of the actual date of the birth and the expected date of the birth.
Employee is in continuous employment for 26 weeks prior to and including the QW. (SMP)	Select the Eligible for Maternity based on Employment Conditions check box on the UK Maternity Leave page in PeopleSoft Human Resources.	If the employee has not been in continuous employment for the qualifying period, do not select the check box. SMP is paid only for an employee if you manually select this check box.
Employee is over 65 or under 16 at start of PIW. (SSP)	The system displays a warning on the Absence Data page in the core application.	The employee is not paid SSP.
No MATB1 form. (SMP)	PeopleSoft Global Payroll for the UK does not pay SMP unless you enter a date in the Form MATB1 Received field on the UK Maternity Leave page in PeopleSoft Human Resources.	Enter a date in the Form MATB1 Received field on the UK Maternity Leave page in PeopleSoft Human Resources.
No notification of absence 28 days after the birth. (SMP)	The system displays a warning on the UK Maternity Leave page if you do not enter a date in the Form MATB1 Received field on the UK Maternity Leave page.	Enter a date in the Form MATB1 Received field on the UK Maternity Leave page.
PIW spans over three years. (SSP)	None.	PeopleSoft Global Payroll for the UK does not pay SSP on the date when the PIW reaches the three-year mark.

Entitlement Condition	Resolution	Comments
PRI within six weeks prior to the EWC. (SMP)	The system displays a warning message if you enter an SSP absence within 6 weeks of the EWC.	PeopleSoft Global Payroll for the UK does not pay SSP if the absence is pregnancy related and within six weeks of the EWC.
	The system displays a warning on the Absence Data page.	PeopleSoft Global Payroll for the UK does not pay SSP. It calculates the maternity disqualifying period by taking the date entered in the MPP Actual Start Date field on the UK Maternity Leave page and adding 18 weeks.

Viewing Absence Details

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

Pages Used to View Absence Details

Page Name	Object Name	Navigation	Usage
Payee Absence Exceptions	GPGB_ABS_EXCEP	Global Payroll United Kingdom, Manage Payroll Process (GBR), Inquire, Absence Exceptions	View absence exceptions, absence dates, and payment details for your payees
Absence Data	GPGB_ABS_EXCEP_SP	Click the Detail link on the Payee Absence Exceptions page.	View additional details about a payee's absence.

Viewing Absence Exceptions, Absence Dates, and Payment Details

Access the Payee Absence Exceptions page.

Viewing Delivered Absence Earnings

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

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

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

See Also

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

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

CHAPTER 11

Calculating Net-to-Gross Payments for the UK

This chapter provides an overview of how to:

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

Setting Up Net-to-Gross Calculations for an Earnings

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

See Also

PeopleSoft Global Payroll PeopleBook, Overview of Earnings and Deduction Elements

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

PeopleSoft Global Payroll PeopleBook, “Defining Calculation Elements,” Defining Formulas Elements

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

Entering Net-to-Gross Payments

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

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

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

See Also

PeopleSoft Global Payroll PeopleBook, “Working with Positive Input,” Pages Used to Enter Positive Input

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

Setting Up Payslips for the UK

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

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

This chapter provides an overview of how to:

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

See Also

“Using Self-Service Applications for the UK”

Defining Elements to Display on Payslips

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

Elements Common to the Payslip Definition Component

The following fields are common to multiple pages in the Payslip Definition component, and are documented once in this section.

Payslip ID	The payslip ID that you entered to access the page.
Payslip Element Order	Enter the order in which the elements on your payslip are to appear.
Payslip Description	Enter a description for the element. This description will appear on your payslip.

Detail Element Type	A Detail Element Type is an element that adds detail to the information displayed on the payslip (an example would be the NI Category). After selecting the type of detail element, you must select a specific element belonging to the defined type (a specific variable, for example) in the Detail Element field.
Detail Element	Enter the name of a specific element belonging to the element type specified in the Detail Element Type field.
Entry Type	Select the type of element that you are using: <i>Abs Entitl</i> (absence entitlement), <i>Abs Take</i> (absence take), <i>Accumulatr</i> (accumulator), <i>Array</i> , <i>Auto Assgn</i> (auto assign), <i>Bracket</i> , <i>Deduction</i> , <i>Duration</i> , <i>Earnings</i> , <i>Formula</i> , <i>SystemElem</i> (system element), or <i>Variable</i> . Note. On the Payslip Positive Input Definition, Payslip Arrears Definition, and Payslip Retro Delta Definition pages, select only earnings or deductions elements.
Current Balance	Enter the element name that you want to use to calculate the current balance for that month.
YTD Balance (year-to-date balance)	Enter the element name that you want to use to calculate the year-to-date balance.

Pages Used to Define Payslip Elements

Page Name	Object Name	Navigation	Usage
Payslip Earnings Definition	GPGB_PSLIP_D_ERN S	Global Payroll United Kingdom, Self Service (GBR), Set Up, Payslip Definition - Payslip Earnings Definition	Define the earnings that you want to display on your payslip, as well as the order in which those elements should appear.
Payslip Pre-Tax Deductions	GPGB_PSLIP_D_PTX D	Global Payroll United Kingdom, Self Service (GBR), Set Up, Payslip Definition - Payslip Pre-Tax Deduction	Define the pre-tax deductions that you want to display on your payslip, as well as the order in which those deductions should appear.
Payslip After Tax Deductions	GPGB_PSLIP_D_AT XD	Global Payroll United Kingdom, Self Service (GBR), Set Up, Payslip Definition - Payslip After Tax Deductions	Define the after-tax deductions that you want to display on your payslip, as well as the order in which those deductions should appear.

Page Name	Object Name	Navigation	Usage
Payslip Tax Definition	GPGB_PSLIP_D_TAX	Global Payroll United Kingdom, Self Service (GBR), Set Up, Payslip Definition - Payslip Tax Definition	Define the tax elements that you want to display on your payslip, as well as the order in which those elements should appear.
Payslip National Insurance	GPGB_PSLIP_D_NI	Global Payroll United Kingdom, Self Service (GBR), Set Up, Payslip Definition - Payslip National Insurance	Define the National Insurance elements that you want to display on your payslip, as well as the order in which those elements should appear.
Payslip Balances Definition	GPGB_PSLIP_D_BALS	Global Payroll United Kingdom, Self Service (GBR), Set Up, Payslip Definition - Payslip Balances Definition	Define the balance elements that you want to display on your payslip, as well as the order in which those elements should appear.
Payslip Earnings Def. (payslip earning definition)	GPGB_PSLIP_D_POSI	Global Payroll United Kingdom, Self Service (GBR), Set Up, Payslip Definition - Payslip Earnings Def.	Define the positive input elements that you want to display on your payslip, as well as the order in which those elements should appear.
Payslip Arrears Definition	GPGB_PSLIP_D_ARR	Global Payroll United Kingdom, Self Service (GBR), Set Up, Payslip Definition - Payslip Arrears Definition	Define the arrears that you want to display on your payslip, as well as the order in which those arrears should appear.
Payslip Retro Delta Definition	GPGB_PSLIP_D_RTO	Global Payroll United Kingdom, Self Service (GBR), Set Up, Payslip Definition - Payslip Retro Delta Definition	Define the retro payments that you want to display on your payslip, as well as the order in which those payments should appear.

Assigning Payslips to Pay Groups

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

Pages Used to Assign Payslips to Pay Groups

Page Name	Object Name	Navigation	Usage
Payslip Definition by Pay Group	GPGB_PSLIP_GRP	Global Payroll United Kingdom, Self Service (GBR), Set Up, Payslip Definition by Pay Group	Assign created payslips to a pay group. Each pay group can have its own payslip.

Assigning Created Payslips to Pay Groups

Access the Payslip Definition by Pay Group page.

Pay Group: GFPGMEN802 Pay Group GF8-2

Definition View All First 1 of 1 Last

Effective Date: + -

Self Service Payslip ID: UK Payslip for all Paygroups

Payroll Users Payslip ID: UK Payslip for all Paygroups

Printed Payslip ID: UK Payslip for all Paygroups

Payslip Definition by Pay Group page

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

Including Messages on Payslips

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

Pages Used to Include Messages on Payslips

Page Name	Object Name	Navigation	Usage
Payslip Message by Pay Group	GPGB_MESS_GRP	Global Payroll United Kingdom, Self Service (GBR), Set Up, Payslip Message by Pay Group	Include messages on the payslips for all employees who belong to a specific pay group.
Payslip Messages by Employee	GPGB_MESS_EMPL OYEE	Global Payroll United Kingdom, Self Service (GBR), Set Up, Payslip Message by Employee	Include messages on the payslip for a specific employee.

Including Messages on Payslips for Employees in Specific Pay Groups

Access the Payslip Message by Pay Group page.

Pay Group: GBBWEEK_01 BiWeekly Pay Group - Company 1

Scroll Area View All First 1 of 1 Last

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

Effective Date: 27/10/2000

Message Definition View All First 1 of 1 Last

*Sequence:	Message:
1	From the Human Resources Team: Have a Merry Christmas and a Happy New Year!

Payslip Message by Pay Group page

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

Payslip ID	Enter the payslip ID. You must have created a payslip first.
Sequence	Enter the order in which you want to display your messages.

Message Enter the message that you want to display on the payslip. The message will be sent to all employees who belong to the pay group that you specified.

Including Messages on Payslips for Specific Employees

Access the Payslip Messages by Employee page.

Payslip Messages by Employee

Brown, John ID: GPGBEM001 Empl Rcd#: 0

Payslip Message View All First 1 of 1 Last

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

*Effective Date: 27/10/2000

Message Definition View All First 1 of 1 Last

*Sequence:	Message:
1	We do not have your new address on file. Please contact HR with your new address as soon as possible. Thanks.

Payslip Messages by Employee page

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

Payslip ID Select the payslip ID that you require.

Sequence Enter the sequence in which you want to display your messages.

Message Text Enter the message that you want to display on the payslip. The message will be sent only to the employee that you specify.

CHAPTER 13

Setting Up Banking for the UK

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

This chapter provides an overview of PeopleSoft Global Payroll for the UK banking and describes the Payment File Generation page.

See Also

“Setting Up Global Payroll for the UK,” Integrating PeopleSoft Human Resources and Global Payroll, Setting Up UK Banks and Building Societies

PeopleSoft Global Payroll PeopleBook, “Understanding Banking”

PeopleSoft HRMS Application Fundamentals PeopleBook, “Setting Up Banks and Bank Branches”

Overview of PeopleSoft Global Payroll for the UK Banking

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

PeopleSoft Global Payroll for the UK contains code that creates a UK-specific table (GPGB_PAYMENT) during the finalise step of the core banking process. This table contains basic calendar run information, as well as all the transaction and bank data necessary to create a file for BACS-processing software. For each row in the table, there is a new line of data on the output file.

The Payment File Generation page invokes a Structured Query Report (SQR), which transfers the data from GPGB_PAYMENT for a given calendar run ID into a fixed-length file on disk suitable for BACS transmission. Of course, on the Payment File Generation page, the system displays as valid values only those calendar run IDs that have had the banking finalise step run.

See Also

PeopleSoft Global Payroll PeopleBook, “Understanding Banking”

Pages Used in the Banking Process

Page Name	Object Name	Navigation	Usage
Payment File Generation	GPGB_BANK_EFT	Global Payroll United Kingdom, Manage Payroll Process (GBR), Process, BACS File	Create a fixed-length ASCII file that can be used as input to a BACS file for BACS processing software.

Creating a file for BACS Transmission

Access the Payment File Generation page.

Payment File Generation

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

Calendar Group ID:

Pay Entity:

*EFT File Name:

Payment File Generation page

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

See Also

PeopleSoft Global Payroll PeopleBook, “Understanding Banking”

CHAPTER 14

Using Self-Service Applications for the UK

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

Understanding Self-Service Applications

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

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

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

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

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

Pages Used to View and Print Payslips

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Payroll Users Payslip	GPGB_PSLIP_SS	Global Payroll United Kingdom, Self Service (GBR), Inquire, Payroll Users Payslip	Enables a payroll administrator to view employee payslips during the payroll cycle. Payslips must first be set up on the payslip definition pages.

Page Name	Object Name	Navigation	Usage
Payslip Print	GPGB_PSLIP	Global Payroll United Kingdom, Self Service (GBR), Report, Payslip Print	Enables a payroll administrator to create a payslip result table which can be used as a basis for internal or external payslip printing once the payroll process has been finalised. Payslips must first be set up on the payslip definition pages.

Viewing Payslips

Access the Payroll Users Payslip page.

Pay Advice		Wendy Usher		Payment Date:	04/15/2000			
University of Great Britain				Tax Period:	1			
Wendy Usher 26 John Street W96JR NI Number:	Employee ID: GB2M002 Empl Rcd#: 0 Department: Support - Wales Location: Belfast - Northern Ireland Business Unit: Support - GB2	Job Title: Student Lecturer Tax Code: 281L Tax Basis: Cumulative NI Category Code: D						
Bank Sort Code: 60-00-00 Account Number: 12345678	Pay Rate: 2366.00 M	Net: 1734.83 Gross: 2366.00						
Earnings								
Description	Detail	Units	Rate	Base	Percent	Adjustment	Current	Year To Date
Basic Pay							2,366.00	2,366.00

Payroll Users Payslip page (1 of 3)

Before-Tax Deductions								
Description	Detail	Units	Rate	Base	Percent	Adjustment	Current	Year To Date
							0.00	0.00
After-Tax Deductions								
Description	Detail	Units	Rate	Base	Percent	Adjustment	Current	Year To Date
Social Club							10.80	10.80
National Insurance								
Description						Adjustment	Current	Year To Date
NI EE's							167.16	167.16
NI EE's Rebate							0.61	0.61
NI ER's							185.50	185.50
NI ER's Rebate							2.22	2.22
Tax								
Description						Adjustment	Current	Year To Date
PAYE							453.82	453.82
Balances								
Description	Detail					Adjustment	Current	Year To Date
Gross							2,366.00	2,366.00
NI	D					167.16		167.16

Payroll Users Payslip page (2 of 3)

Positive Input								
Description	Instance	Units	Rate	Base	Percent	Current Value	Begin Date	End Date
						0.00		
Arrears Processing								
Description	Current Value		Amt Not Taken		Add to Arrears		Payback Result	
						0.00		
Delta Details								
Description	Source Calendar Id	Source Element	Amount Delta		Base Delta		Unit Delta	
					0.00			
Payroll Messages								
Employee Messages								

Payroll Users Payslip page (3 of 3)

Common Page Information

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

Pay Advice – Earnings

The results of the payroll calculation.

Before Tax Deductions

The results of the payroll calculation.

After-Tax Deductions

The results of the payroll calculation.

National Insurance

The results of the payroll calculation.

Tax

The results of the payroll calculation.

Balances

The results of the payroll calculation.

Positive Input

The results of the payroll calculation.

Arrears Processing

The results of the payroll calculation.

Delta Details

The results of the payroll calculation.

Payroll Messages

The message that you created for the pay group.

Employee Messages

The message that you created for a specific employee.

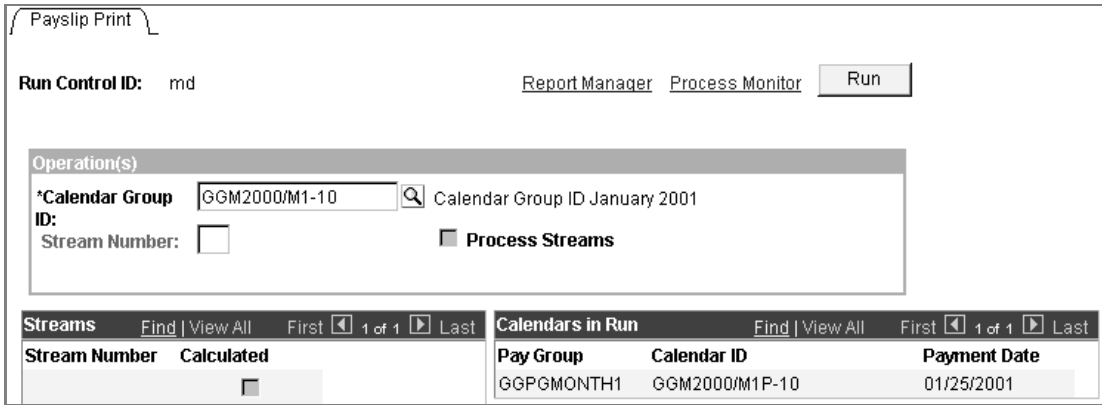
See Also

“Setting Up Payslips for the UK”

Printing Payslips

Access the Payslip Print page.

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



Payslip Print page

Operations

Calendar Group ID

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

Stream Number/Process Streams

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

Streams

Stream Number

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

Calculated

This field indicates which streams have been calculated.

Calendars in Run

Pay Group

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

Calendar ID

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

Payment Date

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

See Also

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

Appendix: PeopleSoft Global Payroll for the UK Reports

This appendix provides an overview of PeopleSoft Global Payroll for UK reports and enables you to:

- View summary tables of all reports.
- View report details and source records.

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

See Also

PeopleTools PeopleBook: Process Scheduler

PeopleSoft Global Payroll for the UK Reports: General Description

The following table lists the PeopleSoft Global Payroll for UK reports, sorted alphanumerically by report ID. The reports listed are all Structured Query Reports (SQRs). If you need more information about a report, refer to the report details at the end of this appendix.

PeopleSoft Global Payroll for UK Reports

Report ID and Report Name	Description	Navigation	Run Control Page
GPGGBTNA Gross to Net	Reconciles your payroll. Run at any time during the tax year.	Global Payroll United Kingdom, Manage Payroll Process (GBR), Report, Gross to Net Report	GPGGB_GPSQR_PNL

Report ID and Report Name	Description	Navigation	Run Control Page
GPGBHLE High/Low Earners	Evaluates earnings based on an element that you select. For example, you can use this report to display all employees who earned more than £2,000 (GBP) as basic pay for a specific period, or to display those employees who received a tax refund during a specific period.	Global Payroll United Kingdom, Manage Payroll Process (GBR), Report, High/Low Earners	GPGB_GPSQR_PNL3
GPGBP11A P11 – Part 1	Lists the National Insurance contributions section of the P11 form.	Global Payroll United Kingdom, Manage Payroll Process (GBR), Report, P11-Part 1	GPGB_GPSQR_PNL
GPGBP11B P11 – Part 2	Lists the PAYE income tax and tax credits section of the P11 form.	Global Payroll United Kingdom, Manage Payroll Process (GBR), Report, P11-Part 2	GPGB_GPSQR_PNL
GPGBP11C P11 – Part 3	Lists the tax credits section of the P11 deductions working sheet.	Global Payroll United Kingdom, Manage Payroll Process (GBR), Report, P11-Part 3	GPGB_GPSQR_PNL
GPGBP14 P14/P60	P14: Summarizes at the end of the year each employee for whom any tax and National Insurance contributions were payable. P60: Tax and National Insurance certificate, or rather the Employee's Certificate of Pay, income tax, and GP1.	Global Payroll United Kingdom, Manage Payroll Process (GBR), Report, P14/P60	GPGB_GPSQR_PNL
GPGBP32 P32	Employer's payment record that lists required details each time an employer makes a payment.	Global Payroll United Kingdom, Manage Payroll Process (GBR), Report, P32	GPGB_GPSQR_PNL

<i>Report ID and Report Name</i>	<i>Description</i>	<i>Navigation</i>	<i>Run Control Page</i>
GPGBP35 P35	Lists at the end of the year all PAYE tax and National Insurance contributions, as well as the Employer's Annual Return.	Global Payroll United Kingdom, Manage Payroll Process (GBR), Report, P35	GPGB_GPSQR_PNL
GPGBP45 P45	Issued to an employee who leaves your employment. This report details current tax information as of the date of last payment and all the employer's tax\reference details required by the employee.	Global Payroll United Kingdom, Manage Payroll Process (GBR), Report, P45	GPGB_RUNCTL_P45
View P45	Used to view a terminated employee's P45 information.	Global Payroll United Kingdom, Manage Payroll Process (GBR), Inquire, View P45	GPGB_EE_P45
GPGBRPRF Profile Report	Displays exactly the information that you require.	Global Payroll United Kingdom, Manage Payroll Process (GBR), Report, Profile Report	GPGB_GPSQR_PNL2
GPGBTXCR Tax Credit	Lists the date when the last tax credit was paid and the date up to which the tax credit was paid.	Global Payroll United Kingdom, Manage Payroll Process (GBR), Report, TC02	GPGB_GPSQR_PNL

Running UK Reports

To run a UK report:

1. Access the run control page created for the report.
2. Select a Calendar Run ID and enter the tax year that you want to process.

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

3. Select Run.

The system displays the Process Scheduler Request page.

4. On the Process Scheduler Request page, specify the server on which you want the report to run, the date, recurrence, and your time zone.

Ensure that you have selected the report that you want to run.

Note. When you run a standard report, Process Scheduler schedules the report and runs it for you.

See Also

PeopleSoft Global Payroll PeopleBook, Setting Up and Running Generic Reports

PeopleSoft Global Payroll for UK Reports: A to Z

This section provides detailed information on individual reports including important fields and tables accessed. The reports are listed alphabetically by report ID.

Note. For every report that you run, you must enter the tax year that you want to process.

Common Report Fields

The following fields are common to many of the run control pages described in this section. They are documented once in the following table:

Tax Year Begins In	(Required) Enter the tax year that you want to process.
Calendar Run ID	Select if you want to run the report for a specific calendar run ID.
Pay Entity	Select if you want to run the report for a specific pay entity.
Pay Group	Select if you want to run the report for a specific pay group.
Calendar Group ID	Select the calendar group ID of the payroll run for which you want to generate a report. This field is available only if you selected the Calendar Run ID check box.
Department	Select the department that you want to include in the report. This field is available only if you selected the Calendar Run ID check box.
Pay Entity	Select the pay entity that you want to include in the report. This field is available only if you selected the Pay Entity check box.

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

GPGBGTNA - Gross to Net Report

Source Records

PS_GP_PIN GP, PS_GP_RSLT_ERN_DED, PS_GPGB_EE_RSLT, PS_GP_PYENT,
PS_GP_PYE_PRC_STAT

SQCs: GPGBRTTC, GPGBRTTD

See Also

Common Report Fields

GPGBHLE - High/Low Earners Report

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

Select the statement that you want to use in your calculation: <, <=, =, >, and >=.

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

Source Records

PS GP PIN, PS GP RSLT ACUM, PS GPGB EE RSLT, PS GP PYENT, PS PERSONAL DATA, PS GPGB_EE_STDTLS, PS GP PYE PRC STAT, PS GP RSLT ERN DED, PS GPGB RUNCTL SQR

SQCs: GPGBRTTC, GPGBRTTD

See Also

Common Report Fields

GPGBP11A - P11 Part 1 Report

Source Records

PS GP PIN, PS GP RSLT ACUM, PS GPGB EE RSLT, PS GP PYENT, PS PERSONAL DATA, PS GPGB_EE_STDTLS, PS GPGB RUNCTL SQR

SQCs: All SQCs

See Also

Common Report Fields

GPGBP11B - P11 Part 2 Report

Source Records

PS GP PIN, PS GP RSLT ACUM, PS GPGB EE RSLT, PS GP PYENT, PS PERSONAL DATA, PS JOB_JR, PS GPGB RUNCTL SQR

SQCs: All SQCs

See Also

Common Report Fields

GPGBP11C - P11 Part 3 Report

Source Records

PS GP PIN, PS GP RSLT ACUM, PS GPGB EE RSLT, PS GP PYENT, PS PERSONAL DATA, PS GPGB_EE_STDTLS, PS GPGB RUNCTL SQR.

SQCs: All SQCs

See Also

Common Report Fields

GPGBP14 - P14/P60 Report

Source Records

For P14: PS GP PIN, PS GP RSLT ACUM, PS GPGB EE RSLT, PS GP PYENT, PS PERSONAL DATA, PS GPGB_EE_STDTLS, PS GPGB RUNCTL SQR.

SQCs: All SQCs

For P60: PS GP PIN, PS GP RSLT ACUM, PS GPGB EE RSLT, PS GP PYENT, PS PERSONAL DATA PS GPGB_EE_STDTLS, PS GP RUNCTL SQR1.

SQCs: All SQCs

See Also

Common Report Fields

GPGBP32 - P32 Report

Source Records

PS GP PIN, PS GP RSLT ACUM, PS GPGB EE RSLT, PS GP PYENT, PS PERSONAL DATA, PS GPGB_EE_STDTLS, PS GPGB RUNCTL SQR.

SQCs: All SQCs

See Also

Common Report Fields

GPGBP35 - P35 Report

Source Records

PS GP PIN, PS GP RSLT ACUM, PS GPGB EE RSLT, PS GP PYENT, PS PERSONAL DATA, PS GPGB_EE_STDTLS, PS GPGB RUNCTL SQR, PS GP PYE PRC STAT.

SQCs: GPGBRTTC, GPGBRTTD, GPGBRTED, GPGBRTEE

See Also

Common Report Fields

GPGBP45 - P45 Report

Calendar Group ID

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

Final Print?

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

Source Records

PS GP PIN, PS GP RSLT ACUM, PS GPGB EE RSLT, PS GP PYENT, PS GPGB RUNCTL SQR, PS GPGB_EE_STDTLS, PS GPGB_EE_STDLOAN, PS GP_PYE_PRC_STAT

Updates 1 table: GPGB_EE_STDTLS

SQCs: All SQCs

See Also

Common Report Fields

View P45

“Defining Statutory Tax and National Insurance Details,” Entering Statutory Tax and National Insurance Details

View P45

The View P45 page displays P45 information for terminated employees. To view P45 data for an employee, you have to select the Calendar Group ID that matches with the last calculation indicated on the Statutory Tax page. The view is based on data in the result tables, and is independent of the P45 report.

To access the View P45 page, you must enter an EmplID, Calendar Group ID, Empl Rcd Nbr, Calendar ID, Segment Number, and Name.

See Also

“Defining Statutory Tax and National Insurance Details,” Entering Statutory Tax and National Insurance Details

GPGBRPRF - Profile Report

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

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

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

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

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

Source Records

PS GP PIN, PS GP RSLT ACUM, PS GPGB EE RSLT, PSGP PYENT, PS PERSONAL DATA, PS GPGB_EE_STDTLS, PS GPGB PROF, PS GP PIN, PS GP RSLT ERN DED, PS GP PYE PRC STAT, PS GPGB RUNCTL SQR

See Also

Common Report Fields

“Setting Up Global Payroll for the UK,” Setting Up Report Profiles

GPGBTXCR - Tax Credit Report
Source Records

PS GP PIN, PS GP RSLT ACUM, PS GPGB EE RSLT, PS GP PYENT, PS PERSONAL DATA, PS GPGB_EE_STDTLS, PS GPGB RUNCTL SQR.

See Also

Common Report Fields

SQCs

Some of the reports in PeopleSoft Global Payroll for the UK call SQCs, which in turn call tables and procedures or other SQCs. The Report Details pages for each report list the SQCs that are called. The following table defines the tables and procedures that are called for each SQC:

SQC	Tables and Procedures/SQCs Called
GPGBSLEE	Tables: GPGB EE RSLT, GP PYE PRC STAT
	Procedures: RETRIEVE-TAX-CREDITS, RETRIEVE-TAX-DATA, RETRIEVE-EARNING-AND-DEDUCTIONS, RETRIEVE-EMPLOYEE-DATA
GPGBRTTC	Tables: GP PIN, GP RSLT ACUM, GPGB EE RSLT, GPGB EE TAXCRD, GP PYE PRC STAT
GPGBRTTD	Tables: GP PIN, GP RSLT PIN, GPGB EE RSLT, GP PYENT, GP PYE PRC STAT
GPGBRTED	Tables: GP PIN, GP RSLT ERN DED, GPGB EE RSLT, GP PYENT, GP PYE PRC STAT

SQC	Tables and Procedures/SQCs Called
GPGBRTEE	Tables: GP PIN, GP RSLT ACUM, GPGB EE RSLT, GP PYE PRC STAT, GP PYENT, PERSONAL DATA, JOB JR, EMPLOYMENT, GP PYENT DTL
	Procedures: PRINT REPORT

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