

PeopleSoft 8.3 Human Resources PeopleBook: Administer Workforce

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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.

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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 ***Active*** or ***Inactive.***
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.

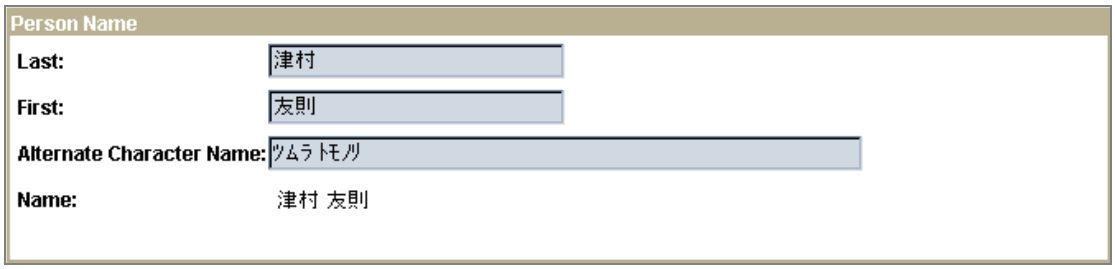
Royal Suffix — Select the appropriate royal suffix. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.

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.



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.

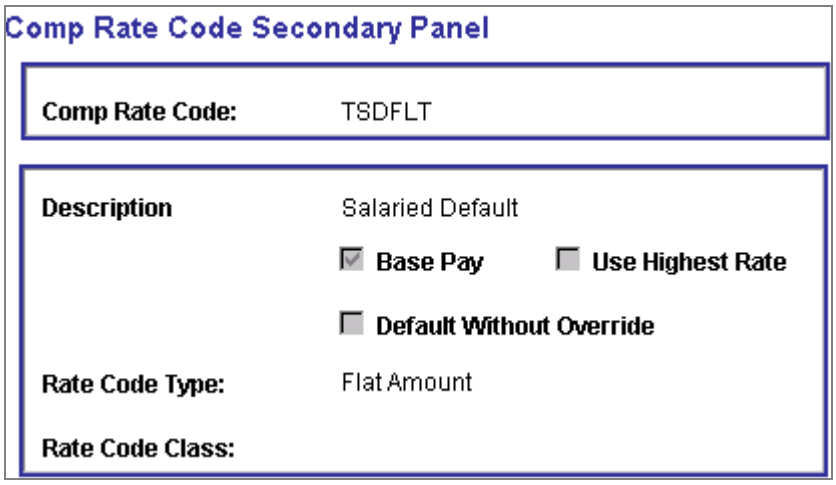
Entering or Viewing Pay Components

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.



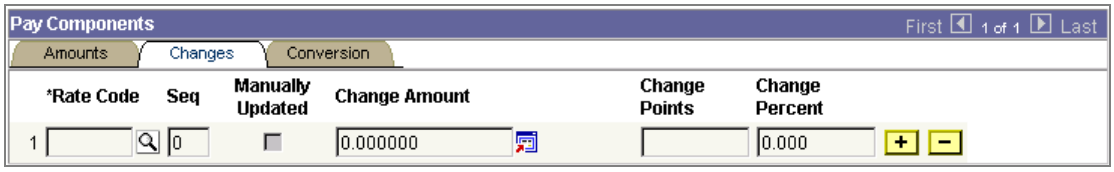
Comp Rate Code Secondary Panel

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 – Changes page

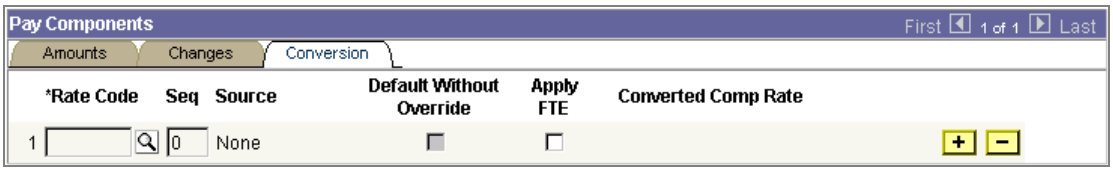
This page displays the change in an employee's salary.

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 – Conversion

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

Source The system displays the source of the rate code, such as ***Absorbing Premium***, ***Seniority Pay***, ***Job Code***, or ***Manual***.

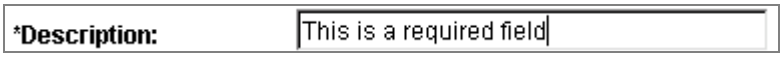
Default Without Override Selected if the worker's compensation package cannot be manually updated on the Job Data – Compensation page.

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.



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**).
Italics	Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears we use this style: ***field value.*** We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number *0*, not the letter *O*.
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 Human Resources PeopleBook: Administer Workforce

This book provides you with the information you will need for implementing and using PeopleSoft Human Resources: Administer Workforce.

This chapter complements and extends the About the HRMS PeopleBooks section of HRMS documentation by providing specific information on how to use the documentation for Human Resources. Much of the general information you should know before you begin using PeopleSoft documentation is presented in About the HRMS PeopleBooks.

Note. We strongly recommend that you read About the 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 Application Fundamentals for HRMS PeopleBook*.

See Also

PeopleSoft HRMS PeopleBooks Preface, "About the HRMS PeopleBooks"

PeopleBooks Standard Page Element Definitions

Throughout our 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 Human Resources.

Field	*Definition*
Benefit Plan	A specific benefit offering within a plan type.
Benefit Plan Type	Also known as Plan Type, it is a two-digit code that identifies a benefit category, such as health, life, or savings.
Benefit Program	A collection of benefit plans your company offers to a group of employees.

Field	*Definition*
Deduction	Any amount taken from an employee's pay check to offset all or part of the cost of the employee's benefits.
Deduction Code	The code assigned to a benefit deduction.
FSA Maximum Annual Pledge	This is the total maximum an employee can pledge to contribution to a health or dependent care flexible spending accounts during a benefit plan year.
FSA Minimum Check Amount	This is the minimum amount for which a check will be printed.
Plan Type	Also known as Benefit Plan Type, it is a two-digit code that identifies a benefit category, such as health, life, or savings.

See Also

PeopleSoft HRMS PeopleBooks Preface, "About the HRMS PeopleBooks," PeopleBooks Standard Page Element Definitions

Understanding the Documentation

Documentation for PeopleSoft Human Resources is made up of 25 business processes, each with their own book:

- Administer Company Cars
- Administer Festive Advance
- Administer Salaries for the Netherlands
- Administer Salary Packaging
- Administer Training
- Administer Variable Compensation
- Administer Workforce
- Base Benefits
- Manage Commitment Accounting
- Manage Competencies
- Manage French Public Sector
- Manage Netherlands Salary Administration
- Manage Performance
- Manage Positions

- Manage Professional Compliance
- Meet Regulatory Requirements
- Monitor Absence
- Monitor Health & Safety
- Plan Careers and Successions
- Plan Salaries
- Recruit Workforce
- Report Total Compensation
- Track Faculty Events
- Track Flexible Service
- Track Global Assignments

Human Resources Reports

The documentation for the Human Resources reports is in the reports chapter in the *PeopleSoft Application Fundamentals for HRMS PeopleBook*. There you will find information about each report, listed by module.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Appendix: PeopleSoft Application Fundamentals for HRMS Reports"

CHAPTER 2

Setting Up the Administer Workforce Business Process

This chapter explains how to:

- Define reasons for personnel actions.
- Create checklists.
- Set up additional name information.
- Set up additional address information.
- Define employee categories.

Later, when you enter employee data, the system validates the entries you make in various fields against the values you've created in the setup tables. This simplifies data entry and helps ensure that—from recruitment to benefits—information is consistent in records across all functions of your PeopleSoft Human Resources system.

See Also

PeopleSoft HRMS PeopleBooks Preface, "About These HRMS PeopleBooks," PeopleBooks Standard Page Element Definitions

Understanding the Administer Workforce Business Process

Just as employees are the driving force of your company, the functions you use in the Administer Workforce menu are the foundation of your human resource management system. The Administer Workforce business process includes five basic steps:

1. Setting up the basic codes and formats needed for the business process.

   Before you begin tracking employee data, it's helpful to set up codes to help you streamline human resource processes for such areas as visas and permits, salary classifications, unions, banking, employment contracts, and checklists. Setting up these codes simplifies data entry and helps ensure that you have consistent information in records across all functions of your human resources system—from recruitment to benefits. If you're managing a workforce in Australia, Belgium, Canada, France, Germany, Hong Kong, Italy, Japan, Malaysia, Mexico, The Netherlands, New Zealand, Singapore, Spain, Switzerland, the United Kingdom, or the United States, you'll also set

up any codes necessary for administering your employees in those countries.

2. Adding a person's human resources record into the system.

   When you bring a new person into your organization, create a record that includes the following:

   - Personal data, such as name, address, and eligibility to work.
   - Job data, such as supervisor, department, and salary.
   - Employment data, such as tenure with your organization.

   When you enter employee data, the system validates the entries you make in various fields against the values you've set up for them.

3. Entering additional data into the record.

   In addition to the data you enter when you add a new record, the data you can track includes the following:

   - Prior work experience.
   - Company property and credit cards issued to the employee.
   - Business expenses.
   - Emergency contact information.
   - Visas, passports, and other identification data.
   - Drivers license information.
   - Bank accounts.
   - Volunteer activities.
   - Employee membership in unions, works councils, or national labor agreements.
   - Country-specific information for workers in Australia, Belgium, Canada, France, Germany, Hong Kong, Italy, Japan, Malaysia, Mexico, The Netherlands, New Zealand, Singapore, Spain, Switzerland, the United Kingdom, or the United States.

4. Updating the record.

   Over time, you'll need to enter changes to a person's human resources record, such as changes of name, address, and marital status; promotions; transfers; and leaves of absence. You can also track employee grievances and disciplinary actions imposed on employees by your organization.

5. Viewing and reporting on employee data.

   You can view summary information about your employees and run a variety of different reports to review and analyze your workforce.

Before You Begin

Find all the core and local setup tables, pages, and functionality described in this section in either the Administer Workforce (GBL) or the Managing Labor Relations (GBL) pages. Also find the core and local functionality for each individual country in the applicable local country pages. Find special functionality for the U.S. federal government in the pages marked (USF).

Set up core data in several setup tables before you begin administering your global or local workforce in PeopleSoft Human Resources. If you're managing a workforce in Australia, Belgium, Canada, France, Germany, Hong Kong, Italy, Japan, Malaysia, Mexico, The Netherlands, New Zealand, Singapore, Spain, Switzerland, the United Kingdom, or the United States, set up additional tables for those local countries for use when hiring employees, entering job information, or tracking additional information for your personnel records or for regulatory reporting.

Note. Defining this setup table data in advance saves users a lot of time and helps prevent data entry errors.

Use the Administer Workforce menu that's appropriate for your implementation of PeopleSoft Human Resources. If you're not sure which of these menus to use, ask your human resource project leader.

Make sure both the global and relevant local country control tables in the Manage Human Resources menus have been set up before you start working with the tables described in this section. Remember that you can access PeopleBooks Help at any time to review online information that describes the purpose of these pages.

If you've implemented multiple business units and setIDs in your human resources system, the information that you use and create is determined by how business unit and setID functionality has been set up for your user ID.

See Also

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

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Jobs and Pay Groups"

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Companies, Agencies, and Locations"

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Banks and Bank Branches"

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

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Multiple Jobs"

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Regulating PeopleSoft HRMS System Data"

"Setting Up Country-Specific Tables"

Defining Reasons for Personnel Actions

In the course of maintaining Administer Workforce business process information, you'll enter changes to employee data resulting from such activities as promotions, transfers, terminations, salary increases, and leaves of absence. Each of these activities is called a *personnel action,* and you use them to enter and update employee data on the Job Data Work Location page. The codes classifying the types of personnel actions you'll perform are stored in the Translate table.

You'll often have different reasons for performing the same type of personnel action for employees. For example, you could enter the action *leave of absence* for one employee for maternity or paternity leave, for another employee because of military service obligations, and for yet another employee for health reasons.

So that you can easily identify the causes of changes made to employee data, you can designate reasons for taking personnel actions. PeopleSoft Human Resources already contains some reasons for actions, but you'll probably want to add others that apply specifically to your company. To do so, use the Action Reason Table page.

If you're driving part or all of PeopleSoft Human Resources by position, you'll want to enter reasons for changes to position data also (on the Position Data 1 page). For example, you might enter a personnel action of *Position Change* because of a reorganization of your company; a change in position title; a job reclassification; or, when you transfer employees to other positions, you need to change the position numbers (and related data) assigned to them.

To add action reasons pertaining to position change actions, use the action code *POS* (position change).

If you send employees on global assignments, you'll probably want to identify reasons for the assignments (on the Home/Host Data page). For example, you might process some assignments that are due to a transfer of skills and others due to a local shortage of skilled personnel. To track assignment types more easily, you'll find it helpful to specify reasons for them.

To set up reasons specific to global assignments, use the action codes *ASG* (assignment) and *ASC* (assignment completion).

Note. To view a complete list of all actions and reasons already defined within the system, generate the Action Reason Table report (PER710).

See Also

PeopleTools PeopleBook: Introduction to PeopleSoft Reporting

Pages Used to Define Reasons for Personnel Actions

Page Name	*Object Name*	*Navigation*	*Usage*
Action Reason Table	ACTRSN_TBL_GBL	Administer Workforce, Administer Workforce (GBL), Setup, Action Reason Table, Action Reason Table Administer Workforce, Administer Workforce (FPS), Setup, Action Reason Table	Use to define reasons for performing personnel actions for employees.
Duties Type	TEMP_DUTIES_TBL	Define Business Rules, Manage Human Resources (GBL), Setup, Temporary Duties Type Table	Defines duty types for Temporary Assignments.

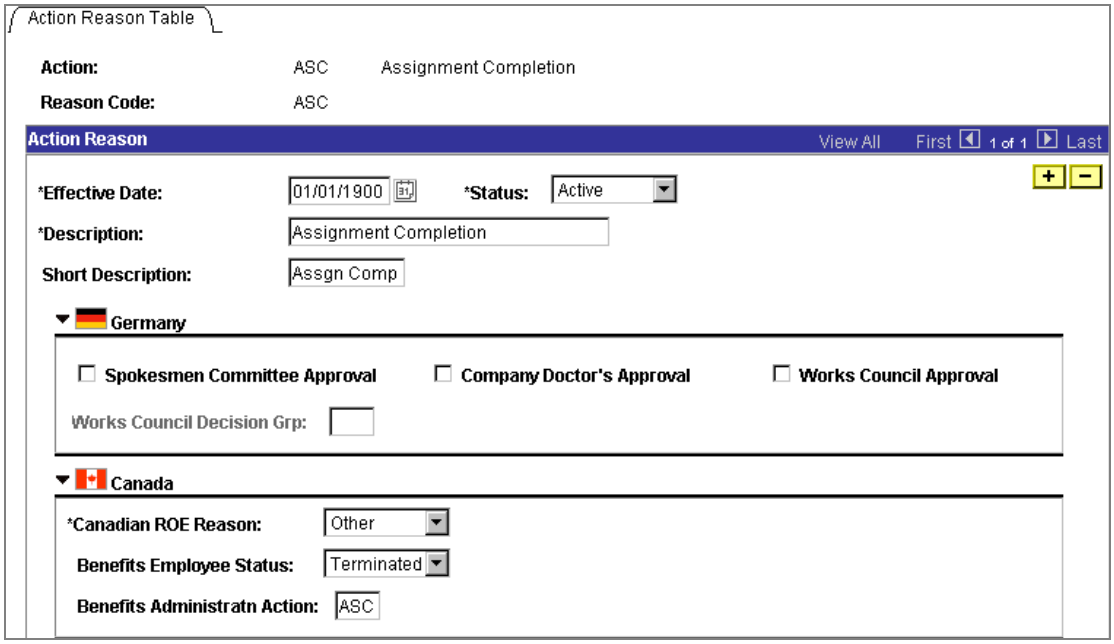
Note. Additional navigation available for the Action Reason Table through Administer Workforce, Track Global Assignments from Global (GLB) and Federal (USF) menus.

See Also

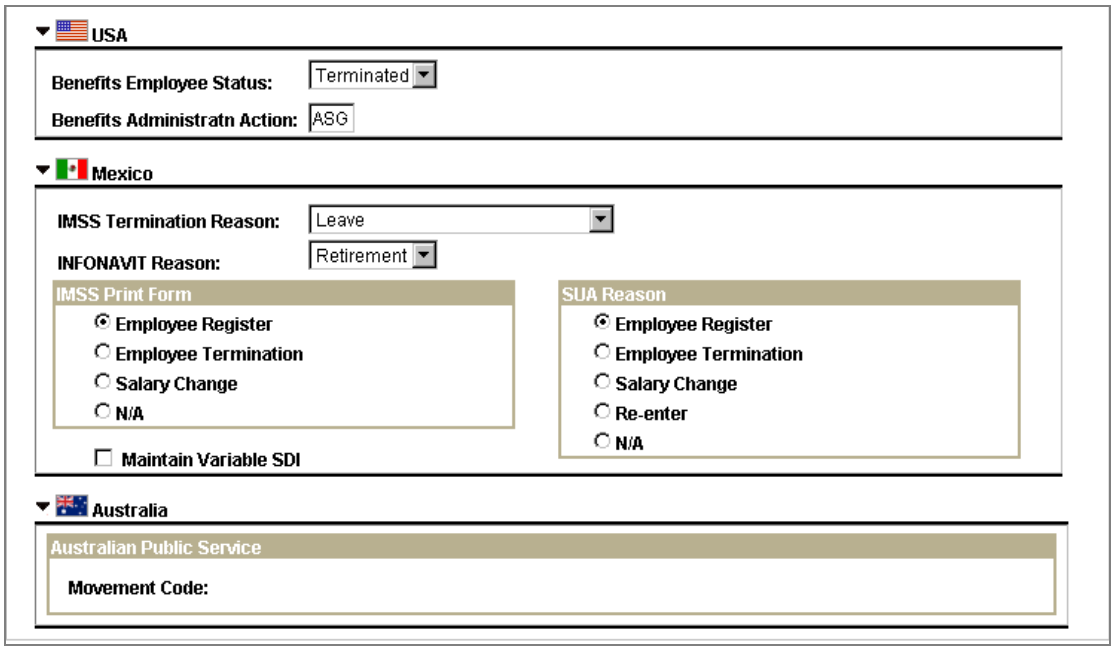
"Entering Additional Data in Human Resource Records," **Setting Up and Tracking Temporary Assignments**

Defining Personnel Action Reasons

Access the Action Reason Table page.



Action Reason Table page (1 of 2)



Action Reason Table page (2 of 2)

(DEU) Germany

Spokesmen Committee Approval Select this check box as an action reason, if applicable.

Company Doctor's Approval Select this check box, if relevant, for this action reason.

Works Council Approval — Indicate if the action reason has the Works Council's approval.

Works Council Decision Grp (Works Council Decision Group) — If you indicate that the code requires the Works Council's approval, you can also select the Works Council Decision Group that approved the action reason.

(CAN) Canada

Canadian ROE Reason (Canadian record of employment reason) — Select a Canadian record of employment reason, such as ***Return to School*** or ***Pregnancy.*** Valid values are defined by the Canadian government.

Benefits Employee Status — Select the status associated with this action.

See Also

PeopleSoft Human Resources PeopleBook: Base Benefits, "Setting Up COBRA Administration"

(USA) USA

Benefits Employee Status — Select the status associated with this action.

Benefits Administratn Action (benefits administration action) — Indicate if the action reason has a specific COBRA action associated with it. For instance, if employees are terminated for certain reasons, they may have the right to COBRA benefits. As such, you could associate action reasons associated with employee terminations to a specific COBRA action..

MEX (Mexico)

IMSS requires a notification for every hire, termination, and salary rate change. Once you've defined the details, these notifications are generated automatically by the system.

IMSS Termination Reason — Select the reason for termination. Valid values are ***Agreement, Collective Termination, Employee Death, Employee Transfer, Inability, Lay-off, Leave, Mental or Physical Disability, N/A, Pension-Off, Retirement, Voluntary Renounce,*** and ***Work Risk Disability.***

INFONAVIT Reason — Select a reason to indicate to INFONAVIT why the INFONAVIT loan payments will stop. Valid values are ***Death, Disability, Disengage, Never Work, Other, Retirement,*** and ***Transfer.***

IMSS Print Form — Select the reason for a change in an employee's information This is done to notify IMSS when an employee is hired, rehired, terminated, or has a salary change.. Valid values are ***Employee Register, Employee Termination, Salary Change,*** and ***N/A.***

SUA Reason Select the reason that gets printed on the SUA notification. Valid values are ***Employee Register, Employee Termination, Salary Change***, ***Re-enter,*** and ***N/A.***

(AUS) Australia

Movement Code Select the appropriate Public Service Merit Protection Commission (PSMPC) movement code for the employment status change.

See Also

"Managing Labor Relations"

PeopleSoft Human Resources PeopleBook: Base Benefits, "Setting Up COBRA Administration"

Creating Checklists

PeopleSoft Human Resources enables you to make checklists to help you remember all the details associated with hiring employees or handling other Administer Workforce tasks. To make the checklists, first specify checklist items. Then add the items to a checklist.

Use standard checklists as they are or use them as the basis for creating new checklists for particular employees. Make the items as general or specific as you want them to appear in checklists. For example, to gather health records, you could set up one code for all health data. Or, you might want to create separate items for all the elements of health records, such as physical exams, immunizations, and tests.

To make a checklist:

1. Create checklist items using the Checklist Item Table page.
2. Create a checklist by adding items to a checklist using the Checklist Table page.

Pages Used to Create Checklists

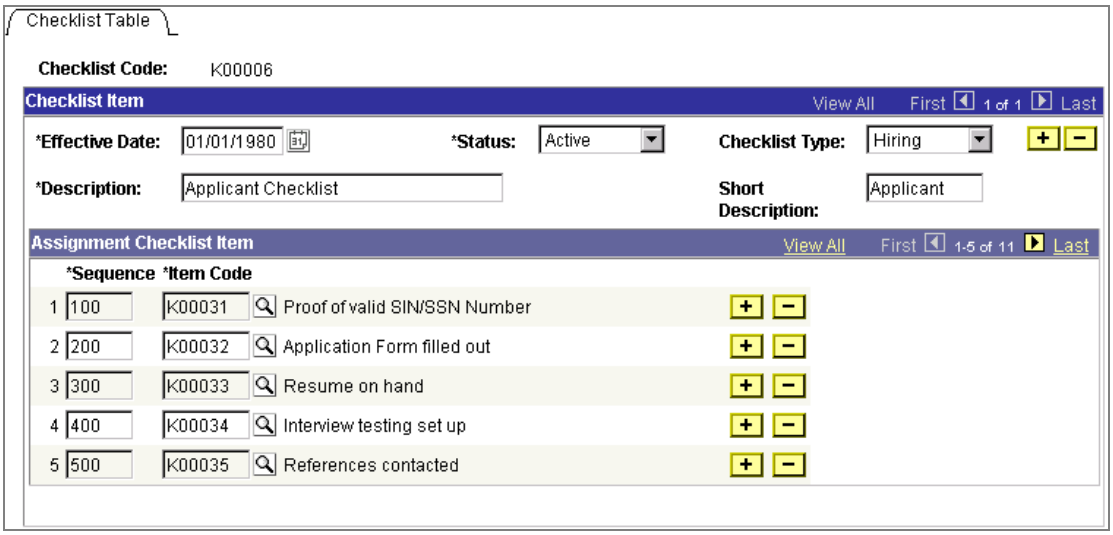
Page Name	*Object Name*	*Navigation*	*Usage*
Checklist Item Table	CHKLST_ITEM_TABLE	Administer Workforce, Administer Workforce (GBL), Setup, Checklist Item Table, Checklist Item Table Administer Workforce, Administer Workforce (FPS), Setup, Checklist Item Table	Use to enter the items included in checklists.

Page Name	Object Name	Navigation	Usage
Checklist Table	CHECKLIST_TABLE	Administer Workforce, Administer Workforce (GBL), Setup, Checklist Table, Checklist Table Administer Workforce, Administer Workforce (FPS), Setup, Checklist Table	Use to create checklists for the various types of processing you do in the Administer Workforce business process.

Note. Additional navigation available through Develop Workforce, Recruit Workforce as well as Administer Workforce, Track Global Assignments from both Global (GLB) and Federal (USF) menus.

Setting Up Standard Checklists

Access the Checklist Table page.



Checklist Table page

Checklist Type Enter the type of checklist you want to create.

Sequence and **Item Code** The system automatically sequences the item codes in multiples of 100. When you insert a data row for a new item, the system automatically assigns the next multiple of 100, such as 400.

To rearrange the order in which the items appear, change the sequence numbers to the numerical order you want. For example, to reverse the order of ***Outline Office hours/holidays (100)*** and ***Outline job responsibilities***

(200), assign a lower number to ***Outline job responsibilities*** (such as ***150***) and a higher number to ***Outline Office hours/holidays*** (such as ***175***). When you save your changes, the system automatically redisplays the items in the new order.

Setting Up Additional Name Information

Whether you're managing a global workforce or a workforce in a single country, you'll need to track a variety of employee names and titles as part of your employment records. With the Name Prefix, Name Suffix, Name Royal Prefix, Name Royal Suffix, and Title tables, you can define standard name prefixes like *Mr.* or *Mrs.* or *Mdme.* and *Mssr.,* and suffixes like *Jr.* and *Sr.*

If you're managing a European workforce, you can track additional standard naming conventions for Germany and the Netherlands, such as the royal name prefix *von* for German workers. You can also track formal titles such as *professor, doctor,* or *count.* These tables provide you with a flexible method for tracking a wide variety of naming conventions in your human resources system.

Pages Used to Set Up Additional Name Information

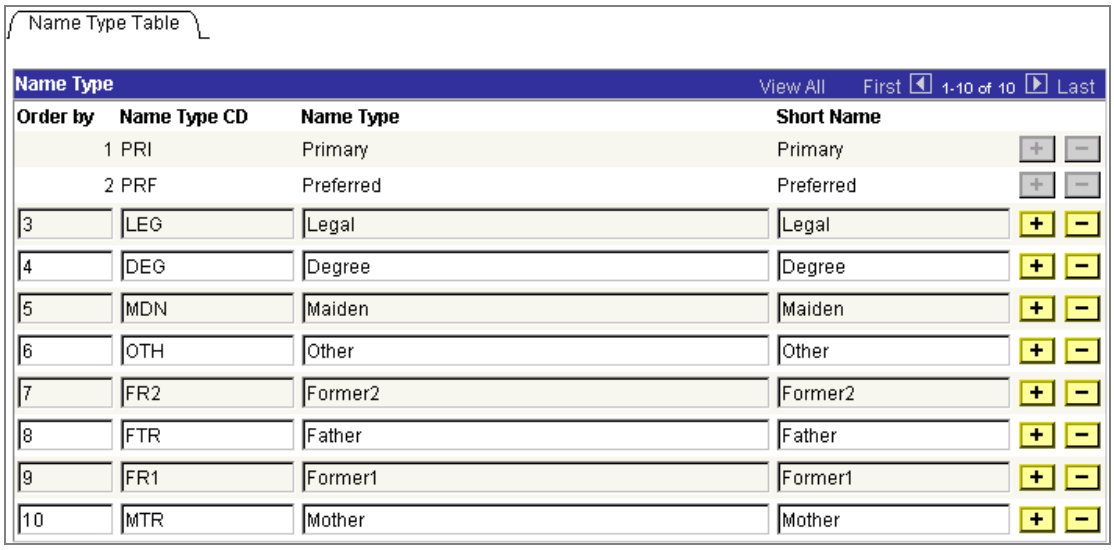
Page Name	*Object Name*	*Navigation*	*Usage*
Name Type Table	NAME_TYPE_TBL	Administer Workforce, Administer Workforce (GBL), Setup, Name Type Table Administer Workforce, Administer Workforce (FPS), Setup, Name Type Table	Use to define name types and the order in which they are available.
Name Prefix Table	NAME_PREFIX_TABLE	Administer Workforce, Administer Workforce (GBL), Setup, Name Prefix Table, Name Prefix Table Administer Workforce, Administer Workforce (FPS), Setup, Name Prefix Table	Enter name prefixes that you'll use when you record employee name information.

Page Name	*Object Name*	*Navigation*	*Usage*
Nm Royal Prefix (name royal prefix)	NM_ROYAL_PREFIX	Administer Workforce, Administer Workforce (GBL), Setup, Name Royal Prefix Tbl, Nm Royal Prefix Administer Workforce, Administer Workforce (FPS), Setup, Name Royal Prefix Tbl, Nm Royal Prefix	Enter royal prefixes and descriptions. Name Royal Prefix codes are used primarily for Germany and the Netherlands. When you enter names for workers in the Personal Data pages, you can reference these standard name prefixes.
Name Suffix Table	NAME_SUFFIX_TABLE	Administer Workforce, Administer Workforce (GBL), Setup, Name Suffix Table, Name Suffix Table Administer Workforce, Administer Workforce (FPS), Setup, Name Suffix Table	Enter name suffixes to use to record employee name information. The Name Royal Suffix application is used only by Germany and prompts with DUEVO standards. When you enter names for workers in the Personal Data pages, you can reference these standard name royal suffixes.
Name Royal Suffix Tbl (Name Royal Suffix Table)	NM_ROYAL_SUFFIX	Administer Workforce, Administer Workforce (GBL), Setup, Name Royal Suffix Tbl, Name Royal Suffix Administer Workforce, Administer Workforce (FPS), Setup, Name Royal Suffix Tbl, Name Royal Suffix	Enter royal suffixes and descriptions.
Title Table	TITLE_TBL	Administer Workforce, Administer Workforce (GBL), Setup, Title Table, Title Tbl Administer Workforce, Administer Workforce (FPS), Setup, Title Table	Enter titles for use with employee names. Track standard titles—from *professor* to *mijnheer*—for employee names in your human resources system.

Note. Name prefixes aren't effective dated, nor do they have a status associated with them.

Entering Name Types

Access the Name Type Table page.



Name Type Table page

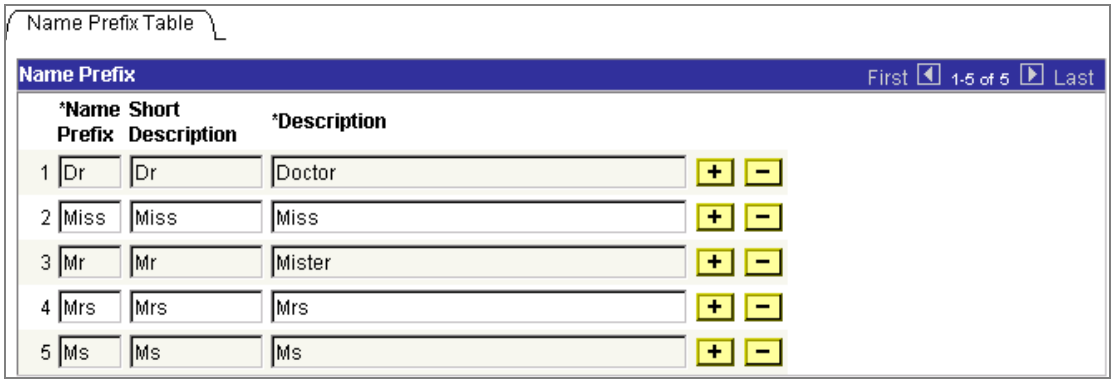
Order by — Enter the order in which the system should make this name type available.

Name Type CD (Name Type Code), **Name Type**, and **Short Name** — Enter a code for the name type, the full name type name, and a short version of the name type.

Note. You cannot edit the Primary and Preferred name types because they are system data.

Creating the Name Prefix Table

Access the Name Prefix Table page.



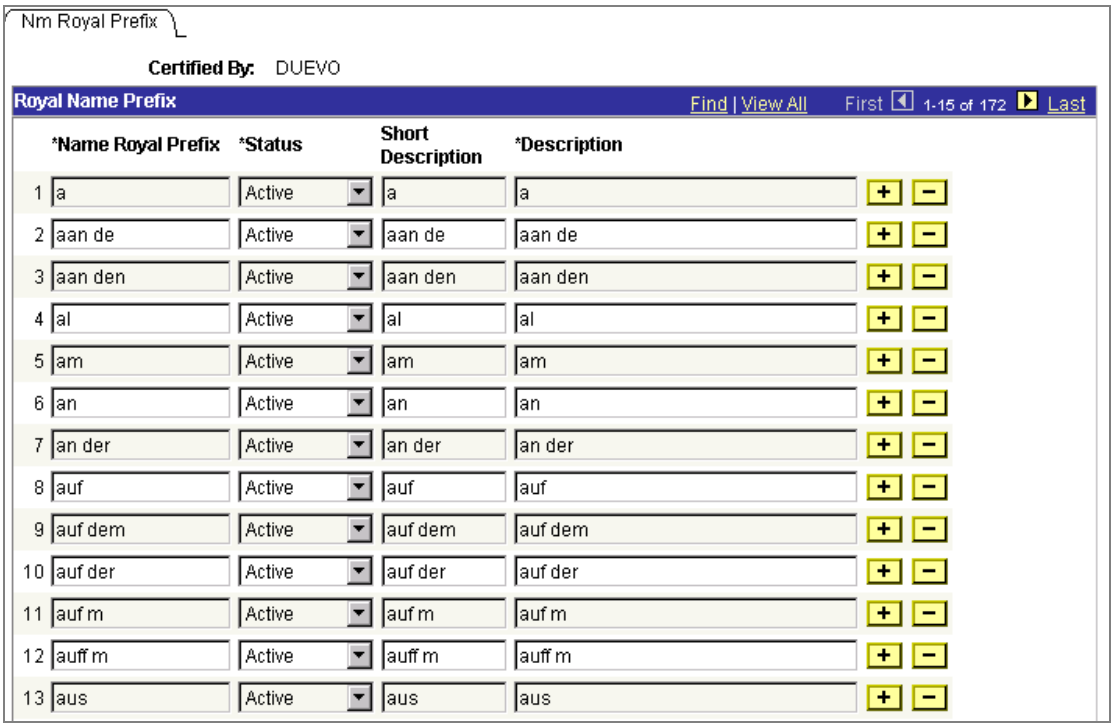
Name Prefix Table page

Name Prefix Enter the name prefix you want to add. When you enter names for workers in the Personal Data pages, you can reference these standard name prefixes.

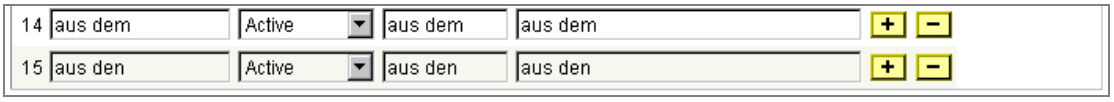
The system displays the prefixes you enter here as part of the worker's name.

Defining Royal Name Prefixes

Access the Nm Royal Prefix (name royal prefix) page.



Nm Royal Prefix Table page (1 of 2)



Nm Royal Prefix Table page (2 of 2)

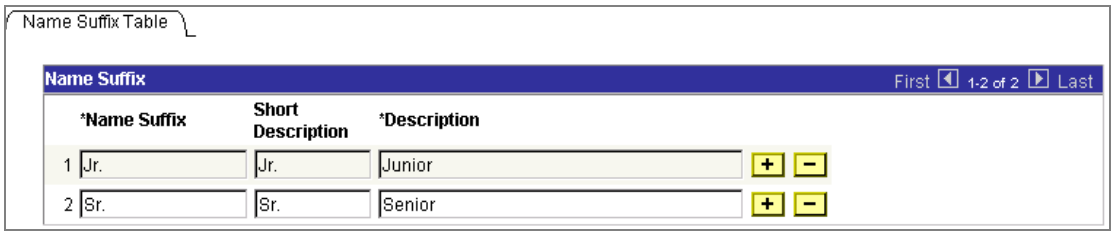
Certified By The value you selected when you accessed the page: ***DUEVO*** for German prefixes or ***NEN*** for Dutch prefixes.

Name Royal Prefix Enter a royal prefix name, using up to 15 characters.

Status Name Royal Prefixes aren't effective dated, so to retire a prefix code, change the status to ***Inactive.***

Entering Name Suffixes

Access the Name Suffix Table page.



Name Suffix Table page

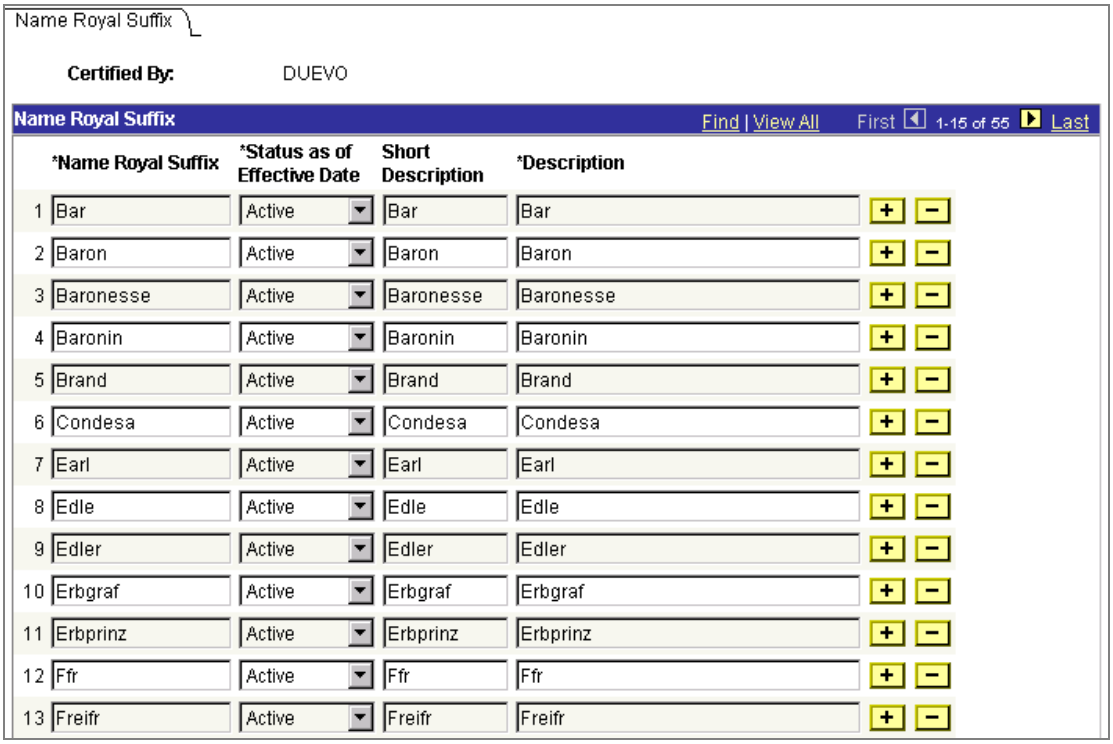
Name Suffix — Enter the name suffix you want to add. When you enter names for workers in the Personal Data pages, you can reference these standard name suffixes.

Short Description and **Description** — Descriptions you enter for the prefix appear on the page as part of the worker's name.

Note. Name suffixes aren't effective dated, nor do they have a status associated with them.

Defining Standard Royal Name Suffixes

Access the Name Royal Suffix page.



Name Royal Suffix page (1 of 2



Name Royal Suffix page (2 of 2)

Certified By The system displays the value you selected to access the page: ***DEUVO*** for German prefixes or ***NEN*** for Dutch prefixes.

Name Royal Suffix Enter a name royal suffix, using up to 15 characters.

Status as of Effective Date Name royal suffixes aren't effective dated, so to retire a suffix code, change the status to ***Inactive.***

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Languages"

Entering Address Types

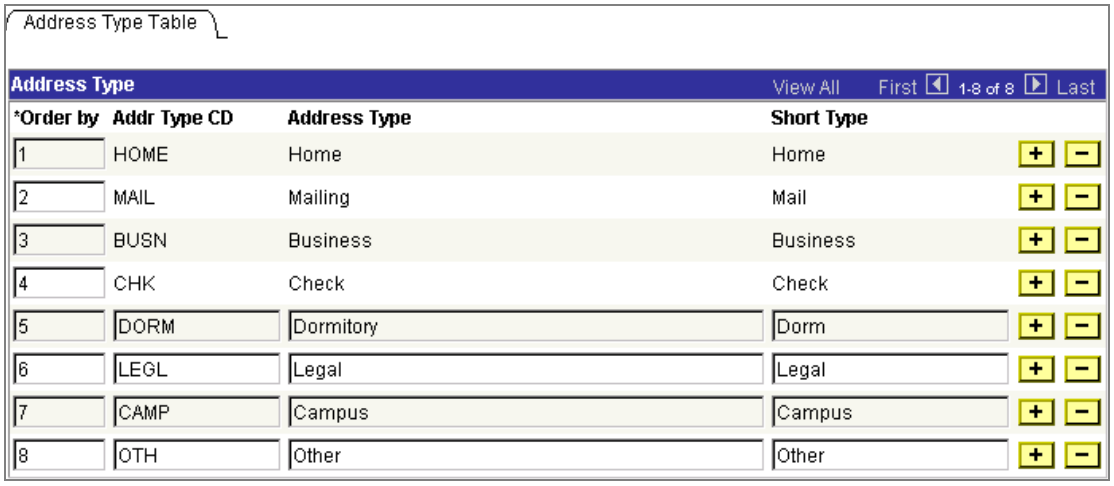
Define address types to use in your system and specify the order in which you want the system to present the different types of addresses.

Pages Used to Enter Address Types

Page Name	*Object Name*	*Navigation*	*Usage*
Address Type Table	ADDR_TYPE_TBL	Administer Workforce, Administer Workforce (GBL), Setup, Address Type Table Administer Workforce, Administer Workforce (FPS), Setup, Address Type Table	Use to define address types and the order in which they are available.

Entering Address Types

Access the Address Type Table page.



Address Type Table page

Order by Enter the order in which the system should make this address available.

Addr Type CD (Address Type Code), **Address Type**, and **Short Type** Enter a code for the address type, the full address type name, and a short version of the address type.

Note. You cannot edit the Home, Mailing, Business, and Check address types because they are system data.

Defining Labor Agreements, Labor Agreement Categories, and Employee Classes

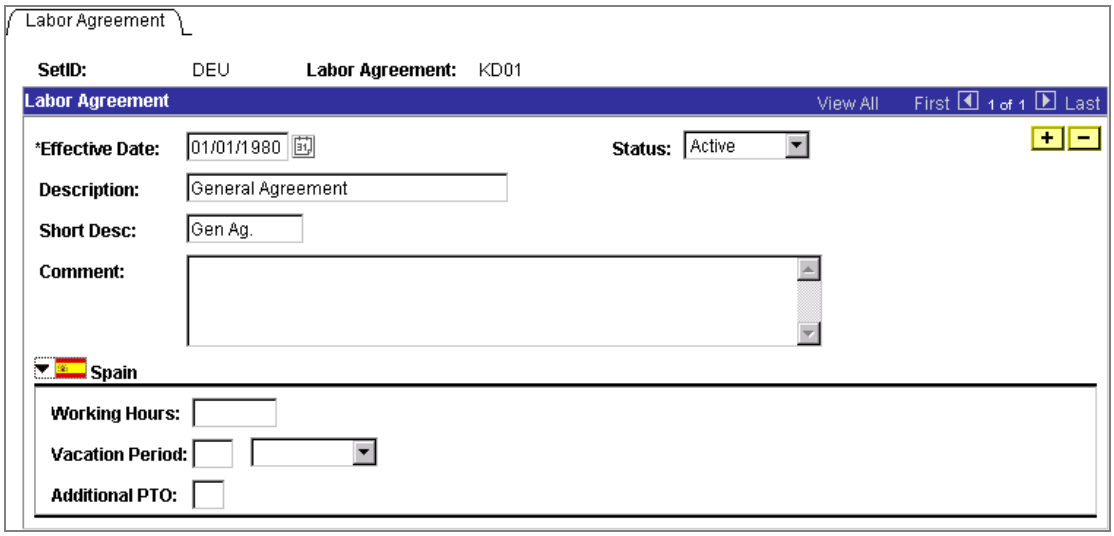
Use these pages to define employee and labor agreement reference details. In addition, define employee classes on regulatory region basis.

Pages Used to Define Labor Agreements Data

Page Name	*Object Name*	*Navigation*	*Usage*
Labor Agreement	EMPL_CTG	Administer Workforce, Administer Workforce (GBL), Setup, Labor Agreement Table, Labor Agreement Administer Workforce, Administer Workforce (FPS), Setup, Labor Agreement Table, Labor Agreement	Define labor agreements.
Labor Agreement Categories	EMPL_CTG_L1	Administer Workforce, Administer Workforce (GBL), Setup, Labor Agreement Category Table, Labor Agreement Category Administer Workforce, Administer Workforce (FPS), Setup, Labor Agreement Category Table, Labor Agreement Category	Define categories and subcategories of employees that fall under a particular national labor agreement.
Employee Class Table	EMPL_CLASS_TABLE	Administer Workforce, Administer Workforce (GBL), Setup, Employee Class Table Administer Workforce, Administer Workforce (FPS), Setup, Employee Class Table	Add or edit employee classifications on the existing regulatory region table sets.

Defining Labor Agreements

Access the Labor Agreement page.



Labor Agreement page

(ESP) Spain

Working Hours — Enter the annual number of working hours that is agreed to by the labor agreement.

Vacation Period — Define the vacation period as agreed upon by the labor agreement. You have the option of defining the vacation period in ***Months, Natrl Days*** (natural days), ***Weeks,*** or ***Work Days***.

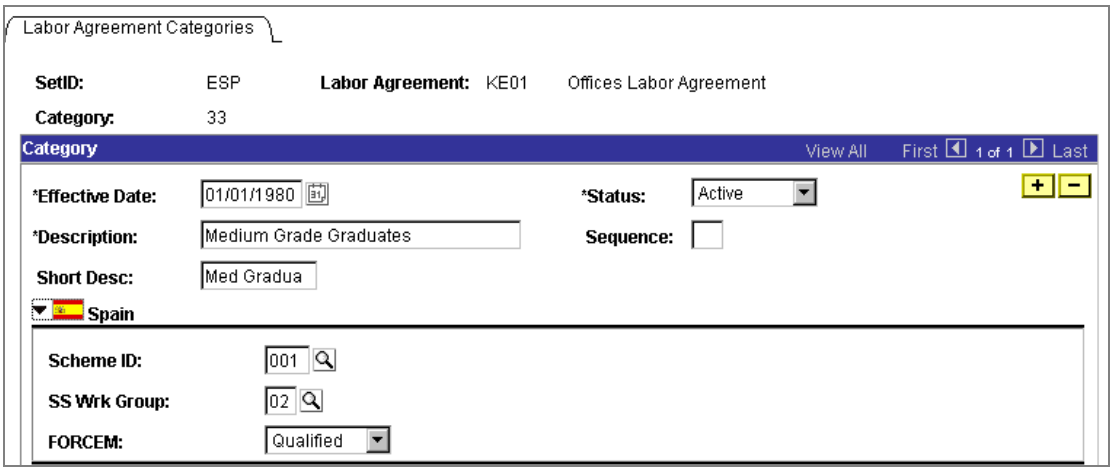
Natural days are like calendar days. They include weekends and holidays.

Work days are like regular working days. They do not include weekends and holidays. For example, let's say that an employee's regular work days are Monday through Friday, and he is entitled to 23 work days of vacation, as defined in his labor agreement. He can take a vacation from July 1 to July 31, using 23 work days. This is calculated as 4 weeks x 5 work days plus 3 more work days.

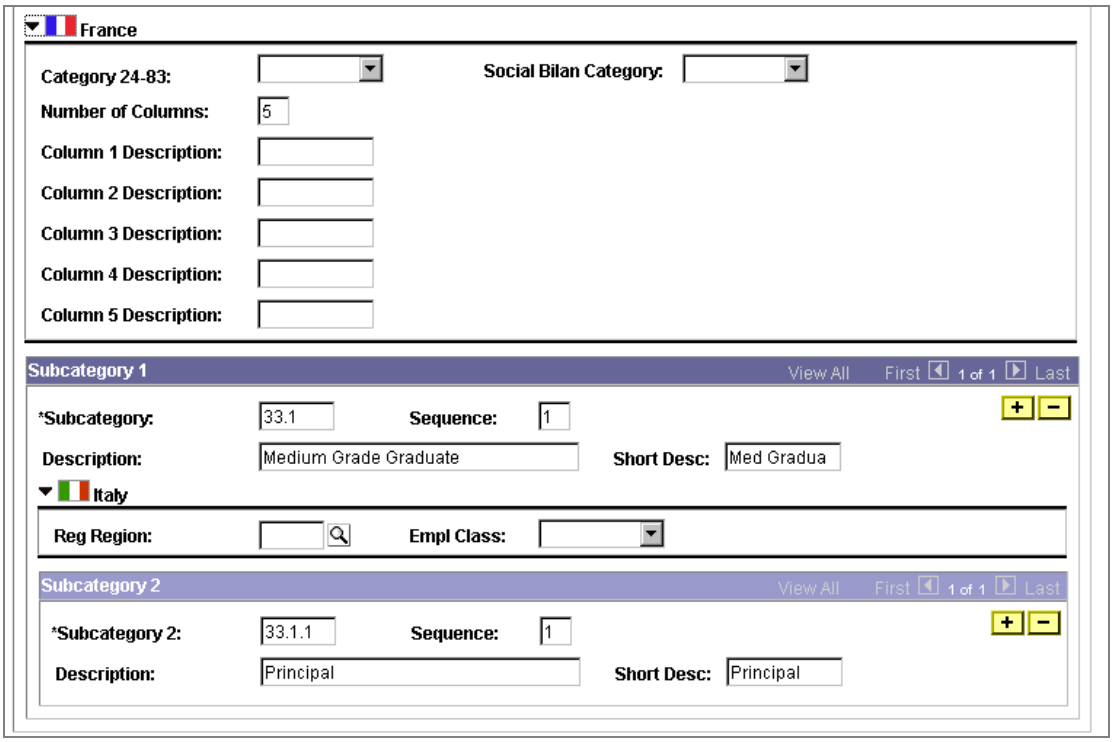
Additional PTO (paid time off) — Enter the amount of additional PTO *(dias moscosos)*, if it applies to the labor agreement. Depending on the conditions of the labor agreement, an employee may or may not carry an additional PTO balance from one year to the next. Sometimes, if an employee does not use additional PTO within the current year, he will lose those days. Other times, it is possible to carry additional PTO balances to the next year.

Defining Labor Agreement Categories

Access the Labor Agreement Categories page.



Labor Agreement Categories page (1 of 2)



Labor Agreement Categories page (2 of 2)

Category Enter the category name. Each labor agreement has its own categories, subcategories, and naming conventions. For example, the French Collective Labor Agreement ***KFO1*** (which is for ***Civil Engineering***) classifies employees in three categories: ***CAD*** (for ***Executive***), ***ETAM*** (for ***Manager***), and ***OUV*** (for ***Workman***). In

Germany, use categories, such as ***Blue Collar Worker*** or ***White Collar Worker.***

Note. When you set up new employee categories, remember that PeopleSoft Human Resources reserves categories starting with zero for use as system data.

Sequence — Use to number the categories in the order the system should process them.

(ESP) Spain

Scheme ID — Enter the social security scheme ID to tie employee categories with social security.

Note. You must enter a scheme ID before selecting the social security work group.

SS Wrk Group (social security work group) — Every Spanish employee must belong to a work group defined by the Spanish government. Select a group from available options.

FORCEM (*Fundacion para la Formacion Continua*) — The Spanish government requires employers to report on their employees' **FORCEM** (Fundacion para la Formacion Continua) categories. Valid values are:

- ***None***
- ***Executive***
- ***Manager***
- ***No Qualifi*** (No Qualified Worker)
- ***Office Wor*** (Office Worker)
- ***Qualified*** (Qualified Worker)

(FRA) France

Category 24-83 — Select the applicable code to link an employee category to a regulatory 2483 category. The Category 24-83 code is used for the 2483 Training Report.

Social Bilan Category — Select the applicable code to link an employee category to a regulatory Employee Survey category. The code is also used for the 2483 Training Report.

Number of Columns — Specify how the category is organized. When you enter a number of columns, the system dynamically changes the number of description fields that appear on the page when you move out of this field. For example, if you enter ***2*** in this field, the system adapts the number of description fields accordingly. In the example above, category *CAD* is organized with three column description criteria: ***Number, Grade,*** and ***Step.***

Subcategory 1

Subcategory and **Subcategory 2**

Use these fields to identify employee subcategories, such as ***Technical Trainees*** or ***Day Laborers.*** See the field description for the **Category** field for instructions on completing these fields.

CHAPTER 3

Setting Up Country-Specific Tables

This chapter covers country-specific tables in Administer Workforce and shows you how to:

- Set up French workforce tables.
- Set up German workforce tables.
- Set up Dutch SAMEN countries.
- Set up Italian workforce tables.
- Set up ethnic groups and religious tables for the Asia Pacific countries.
- Set up Spanish workforce tables.
- Set up US Federal Wage and Separation report tables.

Setting Up Country-Specific Tables

Once you've set up the tables that you'll use to administer your core workforce functionality in PeopleSoft Human Resources, you may also need to set up additional tables to manage the Administer Workforce business process for specific countries.

We'll discuss each of these local setup tables in turn. You need to set up only the tables that are relevant to your organization's business needs.

See Also

"Setting Up the Administer Workforce Business Process"

(FRA) Setting Up French Workforce Tables

Work with the French setup tables to maintain Caisse Primaire d'Assurance Maladie (CPAM) and Caisse Regionale d'Assurance Maladie (CRAM) codes for compliance with French social insurance regulations.

Maintaining French Social Security Tracking Codes

In France, CPAMs are the local social security offices that manage health coverage for French workers. The French government established and regulates CPAMs. If you're managing a

French workforce, you'll need to identify and track the CPAM offices that impact your enterprise.

The CRAM is the regional social security body that oversees the running of CPAMs. CRAM offices work with companies to both prevent and compensate workers for vocational or personal injuries.

Track and report on occupational injuries for French workers using the Monitor Health/Safety application in PeopleSoft Human Resources.

See Also

PeopleSoft Human Resources PeopleBook: Monitor Health and Safety, "Creating and Tracking Incidents"

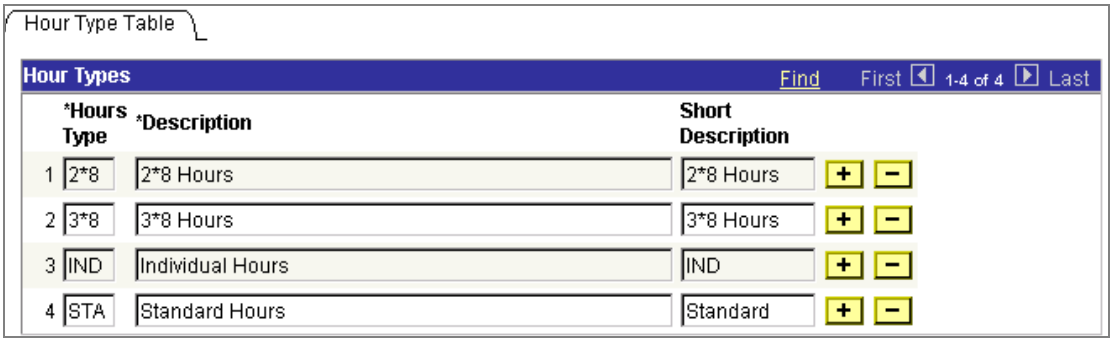
(FRA) Pages Used to Set Up French Workforce Tables

Page Name	*Object Name*	*Navigation*	*Usage*
FRA CPAM Table	CPAM_TABLE	Administer Workforce, Administer Workforce (GBL), Setup Lcl, FRA CPAM Table, Cpam Table Administer Workforce, Administer Workforce (FPS), Setup 2, FRA CPAM Table	Modify or add a CPAM ID to your human resources system.
FRA CRAM Table	CRAM_TABLE	Administer Workforce, Administer Workforce (GBL), Setup Lcl, FRA CRAM Table, Cram Table Administer Workforce, Administer Workforce (FPS), Setup 2, FRA CRAM Table	Modify or add a CRAM code to your human resources system.
FRA Hours Type Table	HOURS_TYPE_FRA	Administer Workforce, Administer Workforce (GBL), Setup Lcl, FRA Hours Type Table, Hour Type Table Administer Workforce, Administer Workforce (FPS), Setup 2, FRA Hours Type Table, Hour Type Table	Define hours type codes that you'll use to track job hours information for French workers.

Page Name	Object Name	Navigation	Usage
FRA Occupational Illness Tbl (French Occupational Illness Table)	OCC_ILLNESS_FRA	Administer Workforce, Administer Workforce (GBL), Setup Lcl, FRA Occupational Illness Tbl, Occupational Illness Administer Workforce, Administer Workforce (FPS), Setup 2, FRA Occupational Illness Table, Occupational Illness	Enter French occupational illness codes.

(FRA) Setting Up the Hour Type Table

Access the Hour Type Table page.



FRA Hours Type Table page

Hours Type Enter the hours type code you are defining. Add rows to define as many hours type codes as needed.

Hours Type	Description
3*8	Indicates a shift work pattern. For example, in the manufacturing or industrial sector, production can go on round the clock. The production workers are split into three groups—each group is working one after the other, eight hours a day. Every month, for example, the workers shift to another group. Shift workers who were working the 12 p.m. to 8 a.m. shift move to the 8 a.m. to 4 p.m. shift. Because this type of work schedule implies a lot of constraints in their personal life, those workers are often paid a shift bonus.
2*8	Works the same way as the 3*8 option, but indicates that there are two work shifts as opposed to three.

Hours Type	*Description*
STA	Indicates that the work hours follow a regular pattern using the job's standard hours as indicated on the Job Information page.
IND	Indicate that the worker's hours follow an individualized pattern that is different from the company's default standard hours. Indicate this amount in the Standard Hours field on the Job Information page. This field is used by the French Employee report (indicator 413 of the Employee Survey for the Trade/Services industry).

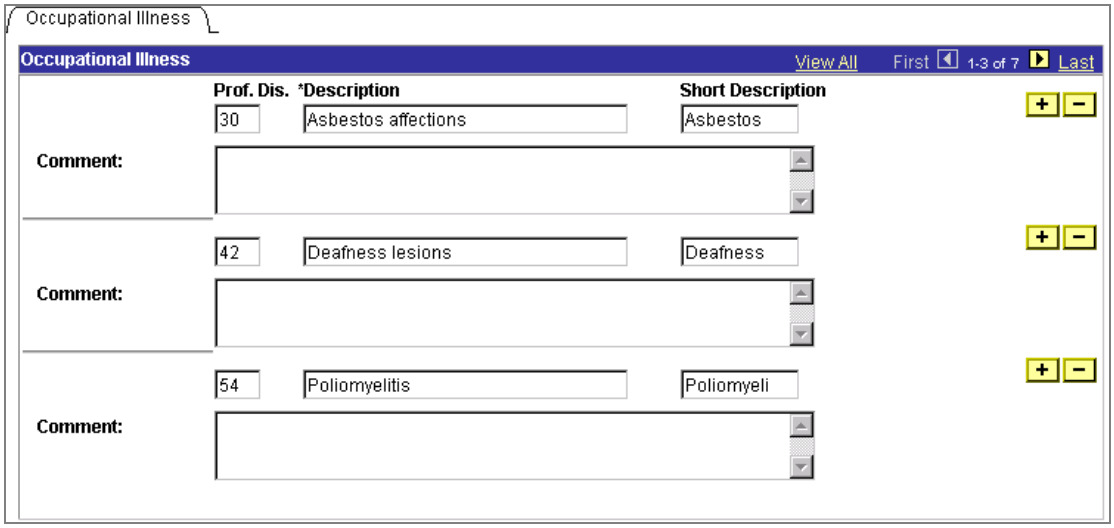
(FRA) Setting Up French Occupational Illness Categories

Use the French Occupational Illness Table page to define occupational illness categories for French workers. Use the illnesses when you enter information on the French Disability page.

Note. The French Occupational Illness table (OCC_ILLNESS_FRA) is used as a prompt table on the field OCC_ILLNESS_FRA for the French Disability page. While there is another Occupation Illness table (OCC_ILLNESS_TBL) used in the Monitor Health and Safety business process, they aren't the same page. If you're entering information about disabilities for French employees on the French Disability page, you must complete this table.

(FRA) Setting Up the Occupational Illness Table

Access the Occupational Illness page.



FRA Occupational Illness page

Prof. Dis. (professional disease) Enter codes for the occupational illnesses that you want to track in your system.

(GER) Setting Up German Workforce Tables

Set up Social Insurance information for German workers, job codes required for reporting employment information to the German government, naming codes for recording specific German naming conventions in compliance with German regulations, job function codes for statistical reporting, and German collective bargaining information.

(GER) Pages Used to Set Up German Workforce Tables

Page Name	*Object Name*	*Navigation*	*Usage*
GER Accident Insurance - Accident Insurance Table	ACCDT_INS_TABLE	Administer Workforce, Administer Workforce (GBL), Setup Lcl, GER Accident Insurance, Accident Insurance Table	Define accident insurance codes for German employees.
GER Accident Insurance - Accident Insurance Address	ACCDT_INS2_TABLE	Administer Workforce, Administer Workforce (GBL), Setup Lcl, GER Accident Insurance, Accident Insurance Address	Enter address information for this accident insurance provider.
GER BA Cd Table (Bundesanstalt fur Arbeit Code Table)	BA_CD_TABLE	Administer Workforce, Administer Workforce (GBL), Setup Lcl, GER BA Code Table, BA Cd Table	Add or update Bundesanstalt fur Arbeit job codes. PeopleSoft maintains the BA Code table so that you can add or update it. All job codes are published by the German Federal Labor Office *(*Bundesanstalt fur Arbeit*)* in Verzeichnis der Berufsbezeichnungen and are required on reports to the German Federal Labor Office.

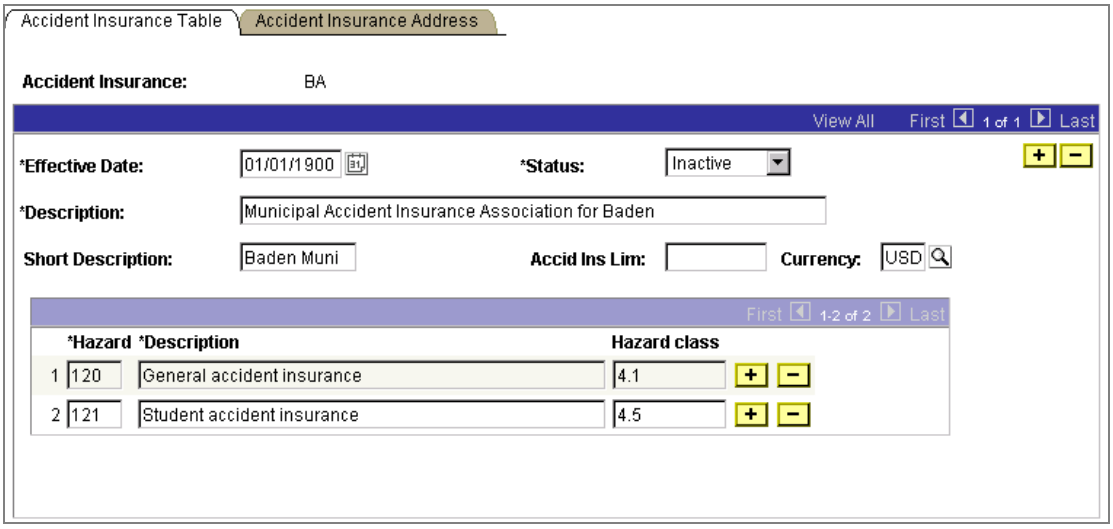
Page Name	*Object Name*	*Navigation*	*Usage*
GER Function Code Table	FUNCTION_CD_TABLE	Administer Workforce, Administer Workforce (GBL), Setup Lcl, GER Function Code Table, Function Code Table	Add or maintain job codes for conducting statistical analyses of your workforce in Germany. For example, you can use the codes you establish here to examine how many consultants, administrators, support staff, or sales representatives make up your workforce.
GER Nation DEUEV Table	NATION_DEUEV_TABLE	Administer Workforce, Administer Workforce (GBL), Setup Lcl, GER Nation DEUEV Table, Nation DEUEV Table	Add or update nation DEUEV information.

(GER) Establishing Social Insurance Information for German Workers

Social Insurance in Germany is maintained and administered by private organizations *(*Berufsgenossenschaften*)* that act as employer's liability insurance associations. Employers pay out a certain amount in the form of premiums to these associations, who administer and pay out funds to workers injured on the job. To manage the amount your company contributes to the fund, set up information regarding accident insurance codes and accident insurance hazard codes. The insurance associations usually determine these codes.

To determine your premium, track the number of employees who belong to a hazard class. This number is multiplied by a hazard factor, and the results are supplied to the social insurance provider, which determines the required premium for your organization. These contribution amounts are based on the number of organizations that the provider serves; for example, if one of the companies in the group goes bankrupt, the other member companies may have to pay higher premiums.

Access GER Accident Insurance - Accident Insurance Table page.



Accident Insurance Table page

Hazard Indicate the code for the hazard type.

Note. German hazard codes are regulated and standardized by the German government.

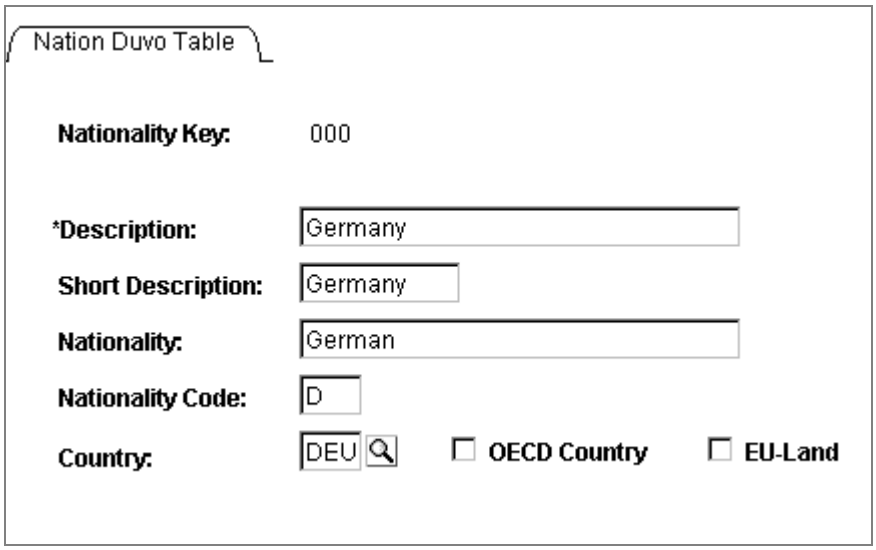
Hazard Class Indicate the class, or degree, of the covered hazard.

(GER) Entering German Nation DEUEV Codes

The Nation DEUEV table is maintained by PeopleSoft and stores nationality codes specified by the German DEUEV Directive that regulates how data is to be provided to the German social insurance administration by companies doing business in Germany. Using these codes is required for compliance with the German DEUEV (data transmission/transfer) Directive.

Note. The nation codes on the Nation DEUEV table are different from the country codes on the Country table. Nation DEUEV codes are specific to the German DEUEV Directive and are not based on ISO.

Access the GER Nation DEUEV Table page.



GER Nation DEUEV Table page

Note. The DEUEV Directive specifies the nationality key for each DEUEV country. Don't change it here unless the DEUEV Directive changes the nationality key.

Nationality — Enter the nationality associated with this country. For example, the nationality associated with The Netherlands is ***Dutch.***

Nationality Code — The DEUEV Directive specifies a unique two-character nationality code for each nationality key. These nationality codes are different from the three-character ISO country codes stored on the Country table.

Country — Indicate an ISO country code to be associated with the DEUEV Directive nationality key.

OECD Country (Organization of Economic Cooperation and Development) — Indicate if the nationality key is for an OECD country. Germany carefully regulates the types of industries in which citizens of non-OECD countries, like Iraq, can work. For example, non-OECD nationals are restricted from working in defense-related industries or for companies that produce products involving protected trade technologies.

Note. There isn't always a one-to-one correspondence between ISO countries on the Country table and the nationality keys on the Nation DEUEV table. The German DEUEV Directive makes nationality distinctions that have no direct relationship to ISO country standards.

EU Land (European Union land) — Indicate if this is European Union land**.** Workers from European Union nations are tracked for purposes of reporting to the German Social Insurance administration.

Note. Nationality keys are attached to an employee's job data on the Job Data Identity/Diversity page. If you're entering information for German workers, the system prompts for the worker's nationality code using the DEUEV nations on the Nation DEUEV table.

(NLD) Setting Up Dutch SAMEN Countries

If you're administering a Dutch workforce, you'll need to track information on the national origin of an employee. Employee national origin is based on either their birthplace or their parent's birthplace. Establishing the ethnic status of workers complies with the SAMEN diversity law (Wet Stimulering Arbeidsdeelname Minderheden) or the "Law to promote equal labor participation for persons of a different ethnic origin" in The Netherlands.

The SAMEN law provides for equal employment opportunities for immigrant workers and/or their children. Children of immigrant workers are subject to this law as well, even if they were born in The Netherlands, and even if the parents have been naturalized, as long as one of the parents was born in one of the SAMEN countries. Every two years, the Dutch Ministry of Social Affairs reviews the list of countries that are designated as SAMEN countries. This decision mainly depends on employment statistics for immigrant workers and their children from certain countries.

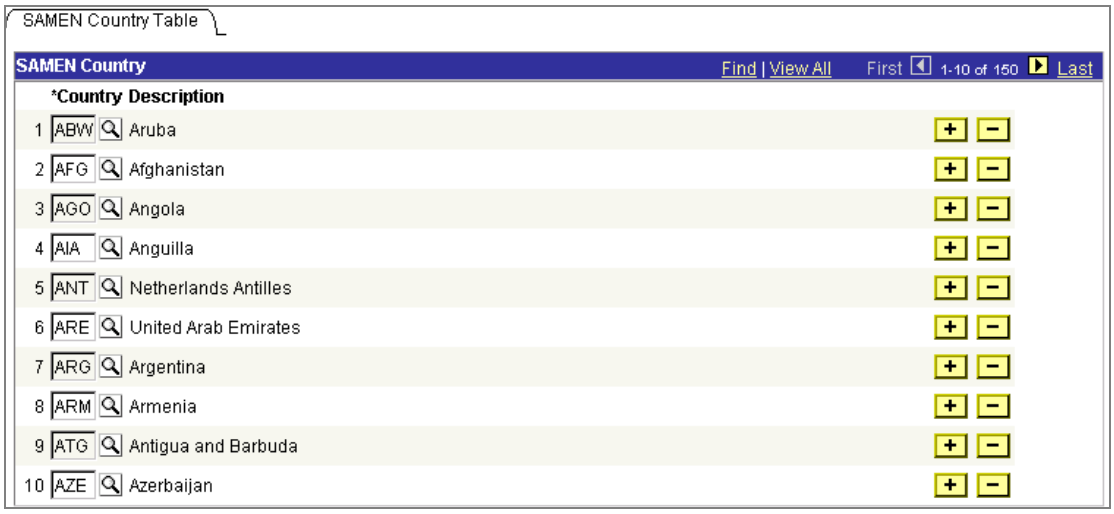
Note. NATO countries (except Turkey) and EEC countries can't, by law, be included on the list of SAMEN countries.

(NLD) Page Used to Set Up Dutch SAMEN Country Table

Page Name	*Object Name*	*Navigation*	*Usage*
SAMEN Country Table	SAMEN_CNTRY_NLD	Administer Workforce, Administer Workforce (GBL), Setup Lcl, NLD SAMEN Country Table, SAMEN Country Table	Update the current list of SAMEN countries.

(NLD) Updating the List of SAMEN Countries

Access the SAMEN Country Table page.



SAMEN Country Table page

To add or update countries for SAMEN reporting purposes, either add or delete a country from the list.

If a country code isn't listed among your SAMEN countries on the SAMEN Country Table page, the system doesn't include this country in the target group for the SAMEN law when you indicate the national origin of a Dutch worker's birth parents on the NLD SAMEN Registration page. However, employees have the right to object to this registration, in which case they aren't included in the SAMEN reporting.

(ITA) Setting Up Italian Workforce Tables

Work with the Italian setup tables to set up turnover reasons and productive units for Italian companies.

(ITA) Pages Used to Set Up Italian Workforce Tables

Page Name	*Object Name*	*Navigation*	*Usage*
ITA Turnover Action	TRV_ACT_REAS_ITA	Administer Workforce, Administer Workforce (GBL), Setup Lcl, ITA Turnover Reasons, Turnover Action	Setup action reasons for job turnover actions.
ITA Production Unit	UNITA_PROD_TBL	Administer Workforce, Administer Workforce (GBL), Setup Lcl, ITA Production Unit, Productive Unit	Define production units based on your company's agreements with the unions.

(JPN) Setting Up Japanese Supervisor Levels

Supervisor levels are a class of position such as Division Manager and Section Chief. They represent levels of some managerial or supervisory significance that bear responsibility for work above a certain level in order achieve the organization's management goals.

The concept of employees' supervisor level is a central one in Japanese companies' human resources management. It may or may not be related to an employee's "job." Companies usually use supervisor level as another type of employee identifier. Companies that do not use capability grades (or Job Management) may still require the tracking of supervisor levels. Many companies pay employees a component of pay related to their supervisor level.

Supervisor levels usually combine with departments to define positions or posts within an organization, as shown in this sequence of three tables.

Table 1: Supervisor Levels

Supervisor Level	*Description*
01	Director
02	Senior Manager

Table 2: Departments

Department ID	*Description*
100	Development
102	Development Section One
200	Sales
210	Sales – West Division

Table 3: Position, Supervisor Level and Departments

Position or Post	*Supervisor Level*	*Department ID*
Director of Development	01	100
Snr Manager of Development Section One	02	102
Director of Sales	01	200
Snr Manager of Sales – West Division	02	210

When you create or update employee Job records, you can enter the supervisor levels that you set up in the Supervisor Level table on the Job Information page. And, because supervisor level is an employee identifier just like Jobcode, Position, or Manager Level, it appears

throughout the system. You can view it or enter it on many of the pages on which you can also view or enter job codes, positions, and manager levels. You can also view it on Job Summary and throughout the Planning Careers and Tracking Global Assignments modules.

(JPN) Pages Used to Set Up Japanese Supervisor Levels

Page Name	*Object Name*	*Navigation*	*Usage*
Supvsr Lvl Tbl	SUPVLVL_TBL_JPN	Define Business Rules, Manage Human Resources (GBL), Setup, Supervisor Level Table, Supvsr Lvl Tbl	Add and modify supervisor level data. Note. This table has SetID as its key.

(AUS, NZL, SGP, MYS) Setting Up Ethnic Groups and Religions Tables for Australia, New Zealand, Singapore, and Malaysia

Regulations in Australia, New Zealand, Singapore and Malaysia require ethnic group tracking by employers. The system tables contain predetermined values for defining ethnic groups and religions. You can add or edit new values and descriptions.

Pages Used to Set Up Ethnic Groups and Religions

Page Name	*Object Name*	*Navigation*	*Usage*
Ethnic Groups	ETHNIC_GROUP_TBL	Administer Workforce, Administer Workforce (GBL), Setup Lcl, AUS Ethnic Groups	Define ethnic groups. Click Add a New Value to add a value or search to select an existing value to edit.
Religions	RELIGION_TBL	Administer Workforce, Administer Workforce (GBL), Setup Lcl, AUS Religions	Define religions and festive advance types. Click Add a New Value to add a value or search to select an existing value to edit.

Elements Common to the Ethnic Group and Religions Pages

Ethnic Category Select an ethnic category from the drop-down list.

FA Holiday Type (festive advances type) Select the appropriate festive advance type associated with this religion.

(ESP) Setting Up Spanish Workforce Tables

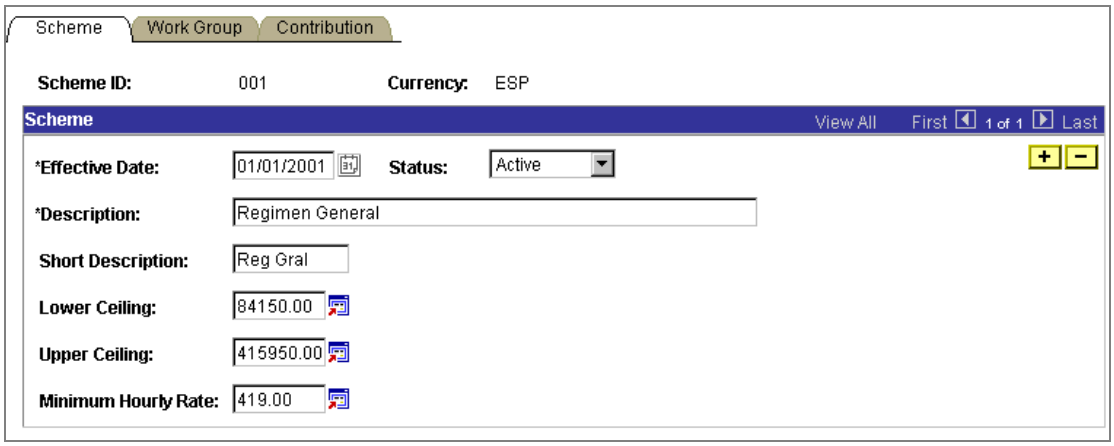
If your organization does business in Spain, set up several tables to track information required by the Spanish government for Spanish workers.

(ESP) Pages Used for Spanish Workforce Tables

Page Name	*Object Name*	*Navigation*	*Usage*
Scheme	GPES_SS_REGIMEN	Administer Workforce, Administer Workforce (GBL), Setup Lcl, ESP SS Scheme Table, Scheme	Review or define maximum and minimum social security ceilings, as well as to review or define the minimum hourly rate for each social security scheme.
Work Group	GPES_SS_RGM_BSE	Administer Workforce, Administer Workforce (GBL), Setup Lcl, ESP SS Scheme Table, Work Group	View and update maximum and minimum bases by work group, as well as the minimum hourly rate used to calculate the social security base for part-time employees.
Contribution	GPES_SS_RGM_CTZ	Administer Workforce, Administer Workforce (GBL), Setup Lcl, ESP SS Scheme Table, Contribution	View and define the rates and percentages for both employees and employers used in the social security calculation.
ESP SS Risk Code Table	SOCSEC_RSKTBL_ESP	Administer Workforce, Administer Workforce (GBL), Setup Lcl, ESP SS Risk Code Table, Soc Sec Risk Code	Define the risk codes that will apply to employees in your organization.
ESP Hiring Center Table	HIRING_CENTER_ESP	Administer Workforce, Administer Workforce (GBL), Setup Lcl, ESP Hiring Center Table, Hiring Center	Define the hiring centers you will attach to employee personnel records on the Contract Data page. You connect every Spanish employee with a hiring center.

(ESP) Defining Social Security Scheme Information

Access the Scheme page.



Scheme page

Lower Ceiling Enter the lower ceiling amount used to calculate the professional contingencies funding base.

Upper Ceiling Enter the upper ceiling amount used to calculate the professional contingencies funding base.

Minimum Hourly Rate Enter the amount used to calculate the professional contingencies funding base in the case of employees working part-time.

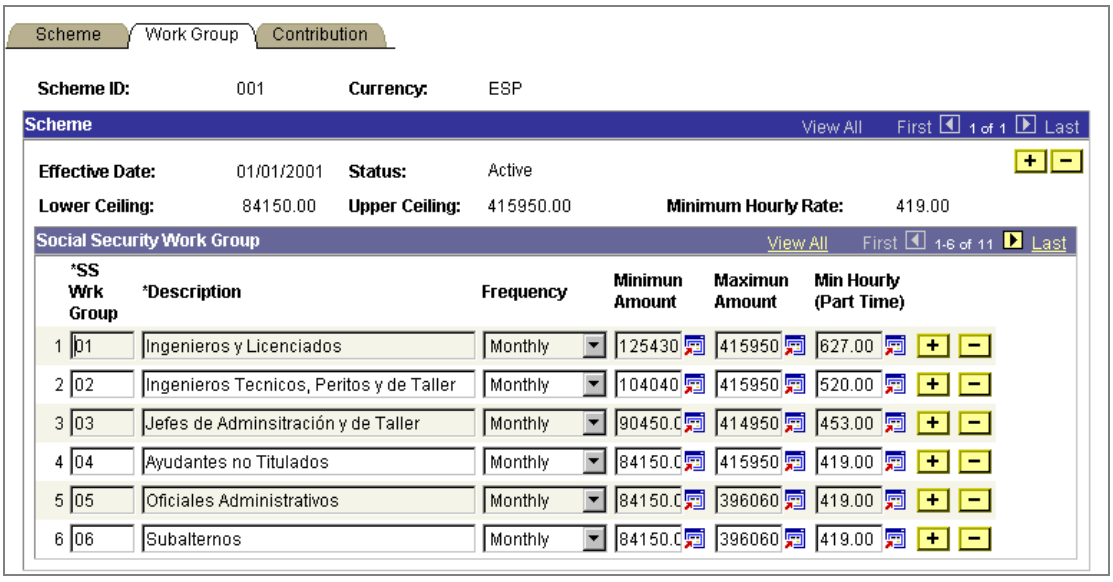
Important! To trigger the correct part-time calculation of the base, you must specify whether the employee is working on a full or part-time basis in the Full/Part field on the Job Information page.

See Also

PeopleSoft Global Payroll for Spain PeopleBook, "Setting Up Social Security Contributions for Spain"

(ESP) Defining Social Security Scheme Work Groups

Access the Work Group page.



Work Group page

Once you've reviewed the ceilings and hourly rate on the Scheme page, you can use the Work Group page to view and update the maximum and minimum bases for regular employees, and the minimum hourly rate used to calculate the funding base for part-time employees. If you need to define rates and percentages for schemes other than the General Scheme, you can do so on this page as well.

SS Work Group (social security work group)
All employees who contribute to social security must be assigned to social security work groups (also know as contribution groups) based on their level of education, professional skills, and job title. The SS Work Group field displays the numerical code for each group.

Frequency
This field displays an ***M*** (Monthly) or a ***D*** (Daily), depending on whether members of the social security work group have their contributions calculated on a daily basis or a monthly basis.

Minimum Amount
Enter the minimum amount used to calculate the common contingencies funding base.

Maximum Amount
Enter the maximum amount used to calculate the common contingencies funding base.

Min Hourly (Part Time)
Enter the minimum hourly rate used to calculate the common contingencies funding base for part-time employees.

Important! To trigger the correct part-time calculation of the base, you must specify whether the employee is working on a full or part-time basis in the Full/Part field on the Job Information page.

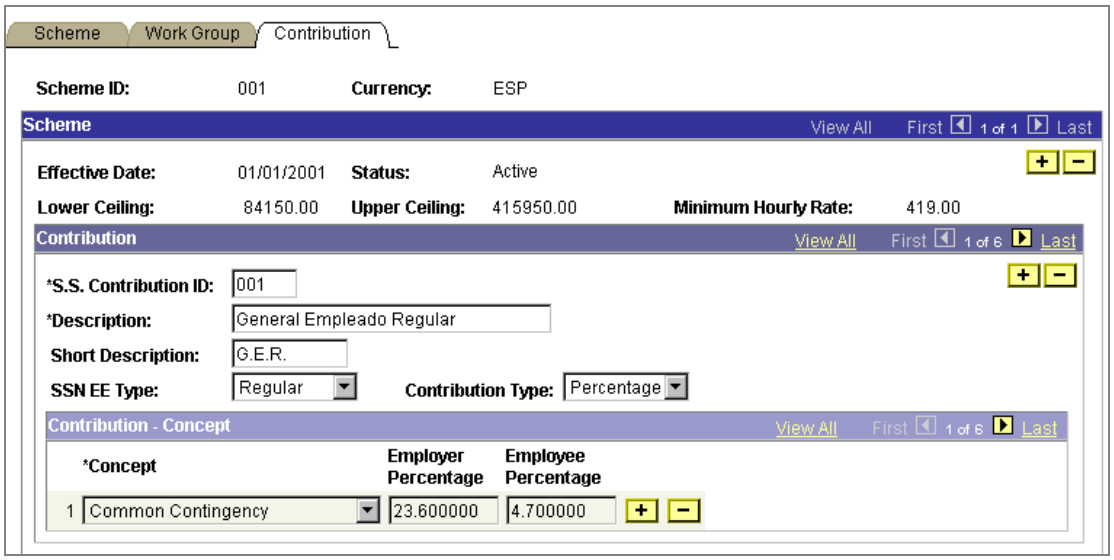
See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce," Entering Employee Job Information

(ESP) Defining Social Security Scheme Contributions

Access the Contribution page.

On this page, you can view and update the rates and percentages used in the social security contribution calculation. If you need to define rates and percentages for schemes other than the General Scheme, you can do so on this page as well.



Contribution page

SS Contribution ID

In PeopleSoft Global Payroll for Spain, there are multiple SS contribution IDs for each scheme ID, and each SS contribution ID is associated with its own rates and percentages. To view the different SS contribution ID classes and their corresponding rates or percentages, use the scroll arrows in the Contribution and Contribution-Concepts scroll areas.

Possible values for the SS Contribution ID are:

- ***General Empleado Regular*** (general regular employee)
- ***Empleado Regular Tiemp Completo*** (full-time regular employee)
- ***Empleado Reg Tiempo Parcial*** (part-time regular employee)
- ***Empleado Regular E.T.T.*** (E.T.T. regular employee)

- ***Training Contracts***
- ***Apprenticeship Contract***

Note. You must associate individual employees with a Scheme and SS Contribution ID on the Contract Data page.

SSN EE Type (social security employee type)

Select one of the following values:

- ***Regular:*** Select to define the percentages used to calculate the contributions of employees with regular contracts.
- ***Apprentice:*** Select to define rates used to calculate the contributions of apprentices.
- ***Training:*** Select to define rates used to calculate the contributions of employees with training contracts.

Contribution Type

Select ***Percentage*** if you will be entering percentages in the Employer Percentage or Employee Percentage fields. If you select ***Percentage,*** the Employer and Employee Rate fields become unavailable for data entry.

Select ***Rate*** if you will be entering rates in the Employer or Employee Rate fields. If you select ***Rate,*** the Employer and Employee Percentage fields become unavailable for data entry.

Important! You should always select ***Percentage*** for regular employees, and ***Rate*** for apprentices and trainees.

Concept

Indicates the type of contributions for which the system displays corresponding employee or employer contribution rates or percentages in the Contribution-Concepts grid. Possible values are:

- ***Common Contingency***
- ***FOGASA***
- ***Non Structural Overtime***
- ***Permanent Disability D & S***
- ***Professional Training***
- ***Structural Overtime***
- ***Temporary Disability***
- ***Unemployment***

Employer Rate

Displays the employer contribution rate associated with the concept listed in the left-hand column of the grid. If you are defining a new rate, enter the rate in this field.

Note. Only contributions of apprentices and trainees are based on fixed rates.

Employer Percentage — Displays the employer contribution percentage associated with the concept listed in the left-hand column of the grid. Social security contributions of regular employees are calculated as percentages of a funding base. If you are defining a new percentage, enter the percentage in this field.

Employee Rate — Displays the employee contribution rate associated with the concept listed in the left-hand column of the grid. If you are defining a new rate, enter the rate in this field.

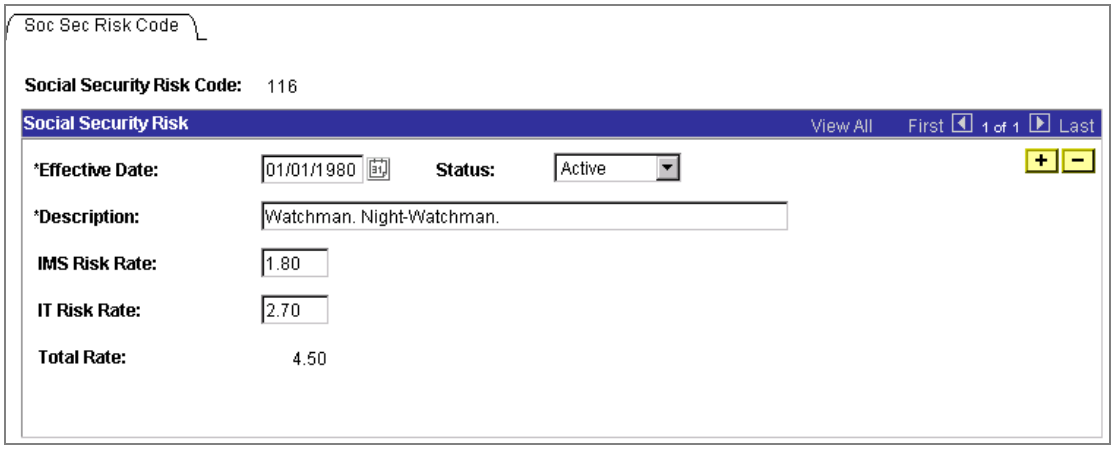
Employee Percentage — Displays the employee contribution percentage associated with the **Concept** listed in the left-hand column of the grid. Social security contributions of regular employees are calculated as percentages of a funding base. If you are defining a new percentage, enter the percentage in this field.

See Also

PeopleSoft Global Payroll for Spain PeopleBook, "Setting Up Social Security Contributions," Calculating the Funding Base in Special Situations

(ESP) Defining Risk Codes

Access the ESP SS Risk Code page.



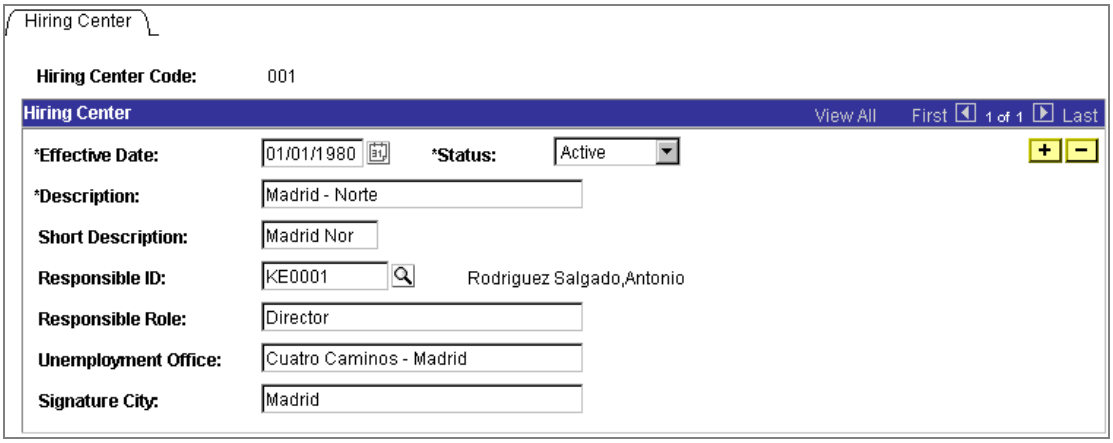
ESP SS Risk Code Table page

Note. The Spanish government requires employers to assign jobs a social security risk code that rates the risk of illness, accident, or death connected with that type of job.

Social Security Risk Code	The code you entered to access this page. This is the code defined on this page.
IMS Risk Rate (Riesgo de Invalidez/Muerte/ Supervivencia)	Enter the IMS risk rate that applies to this social security risk code. The Spanish government assigns IMS risk rate codes that assess the risk of work-related disability, death, or survival.
IT Risk Rate (Riesgo de Incapacidad Temporal)	Enter the IT risk rate that applies to this Social Security Risk Code. The Spanish government assigns IT Risk Rate codes to assess the risk of work-related temporary disability, such as respiratory problems for miners or injuries for construction workers.
Total Rate	The system automatically calculates the total rate, the sum of the IMS Risk Rate, and the IT Risk Rate.

(ESP) Setting Up Spanish Hiring Centers

Access the ESP Hiring Center page.



ESP Hiring Center page

Hiring Center Code	The setID and hiring center code you entered to access this page.
Responsible ID	Select the employee ID of the person in your organization who is responsible for signing employment contracts at this hiring center.
Responsible Role	Enter a description of the job responsibilities of the person you designated in the Responsible ID field.
Unemployment Office	Enter a description of the unemployment office for this hiring center.
Signature City	Spanish contracts must be stamped with the date and the name of the city where the contract was signed. Enter the city's name here.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Regulating PeopleSoft HRMS System Data"

Generating a Wage and Separation Report

Periodically, Federal agencies are required to generate a Form ES-931 report (Request for Wage and Separation Information). State agencies use the information in this report to determine benefit eligibility for each claimant filing claims for Unemployment Compensation for Federal Employees (UCFE).

The generation of the ES-931 report is a two-part process.

1. Use the Setup Wage and Separation component to enter setup information.
2. Use the Print Wage and Separation component to generate the actual report.

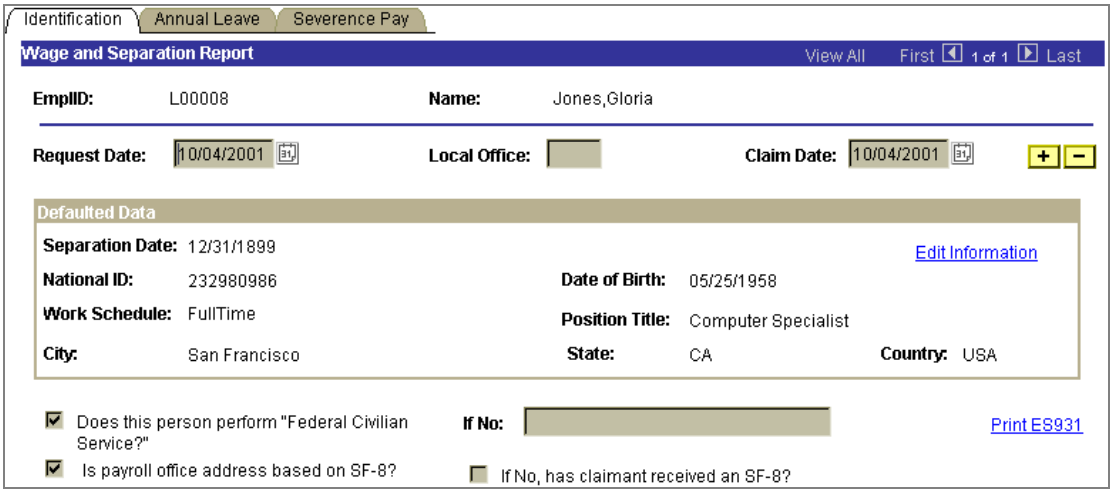
Pages Used to Set Up ES-931 Wage and Separation Report

Page Name	*Object Name*	*Navigation*	*Usage*
Setup Wage and Separation – Identification	GVT_UCFE_PG	Administer Workforce, Administer Workforce (USF), Report, Setup Wage and Separation, Identification	Use to enter employee identification information for the wage and separation report.
Setup Wage and Separation – Annual Leave	GVT_UCFE_PAY_PG	Administer Workforce, Administer Workforce (USF), Report, Setup Wage and Separation, Annual Leave	Use to enter annual leave information for the wage and separation report.
Setup Wage and Separation – Severance Pay	GVT_UCFE_SEV_PG	Administer Workforce, Administer Workforce (USF), Report, Setup Wage and Separation, Severance Pay	Use to enter severance pay information for the wage and separation report.

Note. The pages in the Setup Wage and Separation component will pre-populate the fields for which data is already available and those pre-populated fields will be inaccessible. You will enter data for the remaining fields since data is required in all of the fields.

Entering ES-931 Identification Information

Access the Setup Wage and Separation – Identification page.



Setup Wage and Separation – Identification page

Request Date The date the information was transmitted.

Local Office The numerical ID of the requesting/record holding office.

Claim Date The effective date of the claim.

Print ES931 Clicking on this link will navigate you to the Print Wage and Separation component.

Defaulted Data

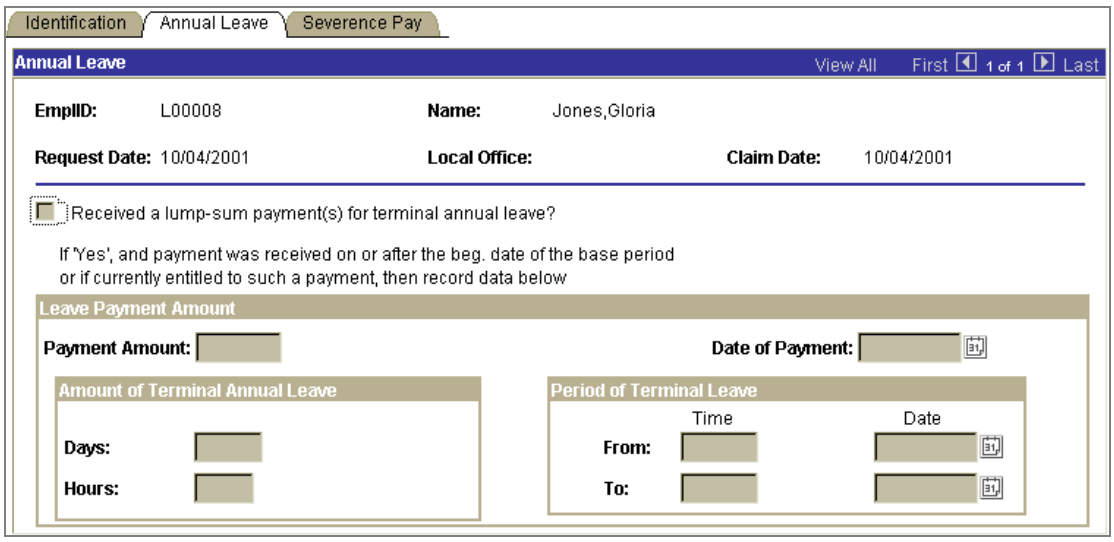
The information in this group pop is pre-populated from existing data, if that data exists. If you need to change a value in a field that was pre-populated, you can click on the **Edit Information** link to make the fields accessible for edit.

If the employee performs Federal Civilian Service, select **Does this person perform "Federal Civilian Service?"**. If the employee does not perform Federal Civilian Service, enter an explanation in the **If "No"** field.

If the payroll office is based on an SF-8, select **Is payroll office address based on SF-8?**. If the payroll office is not based on an SF-8, select **If 'No,' has claimant received an SF-8?** if the claimant has received an SF-8.

Entering ES-931 Annual Leave Information

Access the Setup Wage and Separation – Annual Leave page.

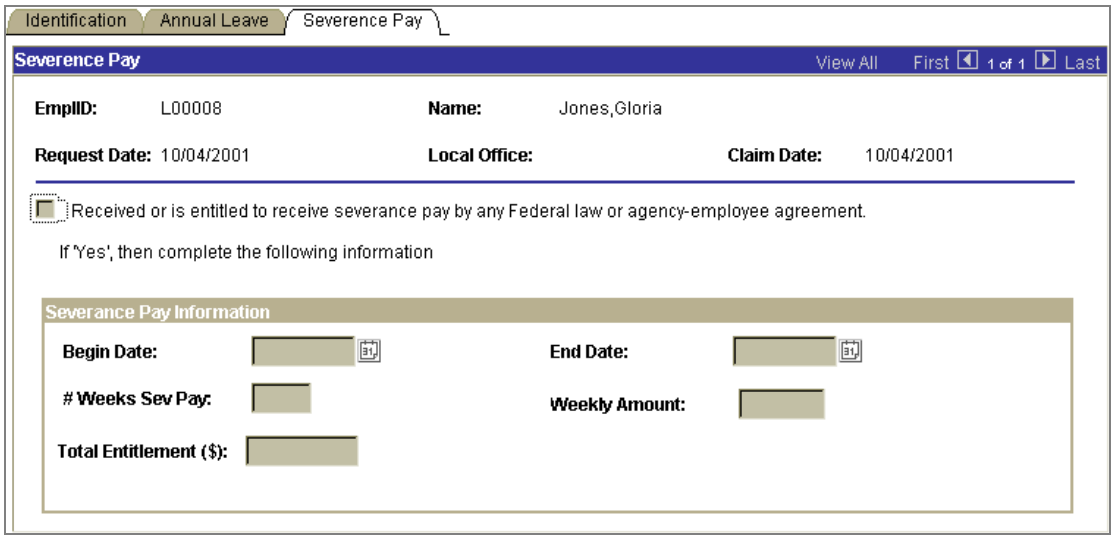


Setup Wage and Separation – Annual Leave page

If the employee received a lump-sum payment for terminal annual leave, select **Received a lump-sun payment(s) for terminal annual leave?**. If selected, and the payment was received on or after the beginning date of the base period, or if the employee is currently entitled to such a payment, enter the related data in the group box.

Entering ES-931 Severance Pay Information

Access the Setup Wage and Separation – Severance Pay page.



Setup Wage and Separation – Severance Pay page

If the employee has received or is entitled to receive severance pay, select **Received or is entitled to receive severance pay by an Federal law or agency-employee agreement.** If selected, enter the related data in the group box.

Generating the ES-931 Report

Once you have completed the necessary setup using the Setup Wage and Separation component, you can generate the ES-931 by accessing the Print Wage and Separation run control page.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Appendix: PeopleSoft Application Fundamentals for HRMS Reports," Administer Workforce Reports

CHAPTER 4

Overview of the Hiring Process

This chapter provides an overview of the hiring process and shows you how to:

- Choose a hiring process.
- Enter data during the hiring process.
- Understand how business units and setIDs affect the hiring process.
- Hire when you use Position Management.
- Use PeopleSoft Workflow to manage hiring.
- Understand hiring versus updating.
- Set up the hiring process.

Understanding the Hiring Process

Whenever you bring a new person into your organization, you must also add a new record to PeopleSoft Human Resources. The information you enter when you hire an employee is the basis for all your other human resource tasks. Once you set up records for a member of your workforce, you can enter more data, build a comprehensive history of the person's career with your organization, and support workforce-related planning and decision-making for all areas of your organization.

Choosing a Hiring Process

There are several ways to add a new human resources record to the system. Each way uses its own component. While all four components are similar, each one is configured to help you enter the correct data for a particular hiring situation.

When You Want To Add...	*Use This Hiring Process*	*And This Component*
A new employee who hasn't applied for a job with your organization and for whom no data currently exists in the system.	Hiring Your Workforce USF – Hiring Employees Hiring French Public Sector Employees	Hire component in the Administer Workforce (GBL) menu. USF: Hire component in the Administer Workforce (USF) menu. FPS: Hire component in the Administer Workforce (FPS) menu.
A job applicant you've been tracking through the Recruit Workforce business process.	Adding Job Applicants USF – Hiring Employees Hiring French Public Sector Employees	Hire Applicant component in the Develop Workforce, Recruit Workforce (GBL) menu. USF: Applicant Hire component in the Develop Workforce, Recruit Workforce (USF) menu. FPS: Hire Applicant component in the Develop Workforce, Recruit Workforce (GBL) menu and then continue the process through the Hire component in the Administer Workforce (FPS) menu.
An additional job for an existing employee.	Adding Concurrent Jobs USF – Hiring Employees Hiring French Public Sector Employees	Add Concurrent Job component in the Administer Workforce (GBL) menu. USF: Add Concurrent Job component in the Administer Workforce (USF) menu. FPS: Add Concurrent Empl Rcd component in the Administer Wrokforce (FPS) menu.
A person who isn't a legal employee of your organization.	Adding Nonemployees	Add Non-Employee component in the Administer Workforce (GBL) menu.

See Also

"Hiring Your Workforce," Assigning Employee IDs

PeopleSoft Human Resources PeopleBook: Manage French Public Sector, "Hiring French Public Sector Employees

PeopleSoft Human Resources PeopleBook: Recruit Workforce, "Hiring Applicants"

Entering Data During the Hiring Process

The information you enter when you add a new person into the system is the foundation for most of the business processes you'll carry out later. That information includes the following:

- Employee ID

  The employee ID is a unique identifying code that you'll use to track each person's records throughout PeopleSoft Human Resources. Most nonemployees can also be assigned an employee ID. A few nonemployees whose records were entered through the Health and Safety module who have employee Ids that are not tracked in PERSON and JOB records.

- Personal information

  Includes name, address, birthdate, birthplace, and marital status.

- General employment information

  Includes business title, work phone, and supervisor. This information is optional, but you'll find it useful for reporting purposes.

- Specific job data

  Includes the employee's department, job code, company, and compensation information.

- Earnings data

  This information is included if the employee's compensation comes from more than one department or category. You'll specify how to distribute the employee's earnings among the sponsoring groups.

- Benefits program

Once you've entered employee information into the system, you can work with it in a variety of ways. For example, you can generate printed reports, view summary data pages, and perform ad hoc queries online. You can also use employee data as the basis for performing tasks in all other aspects of human resource management, such as salary administration, regulatory requirements, payroll, and benefits.

How Business Units and SetIDs Affect the Hiring Process

Business unit and setID functionality in PeopleSoft Human Resources affect the way default values work throughout your human resources system. For example, based on the business unit that you assign to the employee on the Work Location page, setID functionality controls the departments, locations, job codes, salary plans, and so on that you see when you're working in the Hire component.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Regulating PeopleSoft HRMS System Data

Hiring When You Use Position Management

If you're driving part or all of PeopleSoft Human Resources by position, the process for hiring new employees is somewhat different from the one described in this chapter. You'll still enter some data on the pages described in this chapter, but because you've already set up most job-related data on the Position Data pages, the system inserts default data automatically in many fields.

Depending on which type of position management you're using, here's what you'll see:

Full Position Management	*Partial Position Management*
Position-related fields are unavailable for entry in several Administer Workforce pages.	The pages look the same as they do when you drive the entire system by employee, until you enter a position number and move out of the field. Then the system completes position-related fields and makes them unavailable for entry.

Note. If you use position management, review the information in Hiring Your Workforce (GBL) or USF - Assigning Employees to Positions (USF) before you hire employees.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up PeopleSoft HRMS," Driving Your System by Employee or Position

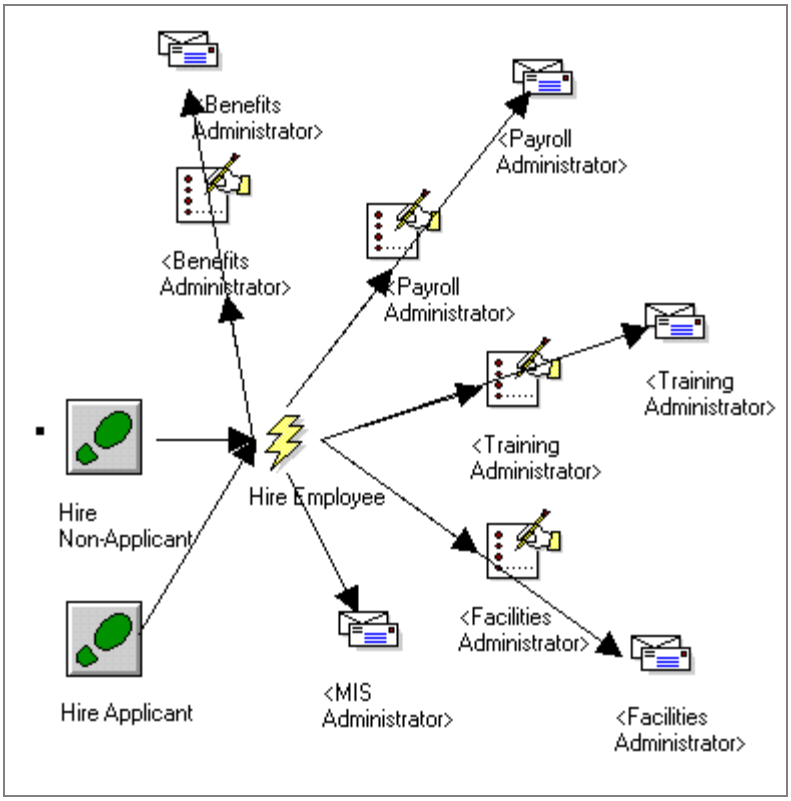
Using PeopleSoft Workflow to Manage Hiring

Hiring employees can be time consuming and involve several different individuals in different parts of your organization. One person hires the employee, another signs the employee up for benefits, and a third person in payroll makes sure the new hire gets paid. Someone else may also sign the employee up for introductory training and orientation. Emails need to be sent and forms need to be completed.

When you use the Hire Employee workflow process, your PeopleSoft Human Resources system handles these work items for you automatically. You hire an employee into PeopleSoft Human Resources; PeopleSoft Workflow takes over from there. All of this is done by the system behind the scenes.

You can also use the Workflow feature to coordinate hiring employees among several departments or groups within your organization. Once the process begins, PeopleSoft Workflow guides it to completion automatically.

The following process flow diagram illustrates the Hire Employee workflow process.



Hire employee activity

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Using PeopleSoft Workflow"

PeopleTools PeopleBook: Workflow

Where to Find the Workflow

Activity	Hire Employee
Event	Hire Employee

The Three R's of Hiring an Employee

We've broken down the Hire Employee workflow into its component rules, roles, and routings to give you a better understanding of it.

Rules

When you hire an employee, the system triggers the business event Hire Employee. The entire Hire Employee business process takes place within this one event.

Roles

Once rules have been established, those rules direct the system to send notification about the new hire to roles within the organization. The roles in the Hire Employees workflow are as follows:

- Benefits administrator
- Payroll administrator
- MIS administrator
- Training administrator
- Facilities administrator

While different or even multiple individuals in your organization may play these roles, the roles themselves must be assigned to an individual role user for the rules and routings to work properly.

Routings

The workflow performs the following routings:

Role	*Email Sent*	*Worklists Generated*
Benefits administrator	Yes	Yes. The system directs the benefits administrator to the Manage Benefit Enrollment activity for the new hire.
Payroll administrator	Yes	Yes. The system directs the payroll administrator to the Update Deduction Data activity for the new hire.
MIS administrator	Yes	No.
Facilities administrator	Yes	Yes. The system directs the facilities administrator to the Company Property pages to issue the appropriate company property to the new hire.
Training administrator	Yes	Yes. The system directs the training administrator to the Enroll Students activity to enroll the new hire in company orientation classes.

Hiring Versus Updating

Many of the pages you'll use when you hire an employee are the same ones you'll use later to update information on existing employees. The system responds differently when you change existing data, so don't use the Hire, Add Non-Employee, or Add Concurrent Job components to update current information.

Warning! We can't guarantee your results if you use the Hire, Add Non-Employee, or Add Concurrent Job components to modify existing data. Use these components only when adding a new hire.

See Also

"Updating Workforce Information "

"USF Processing Personnel Action Requests," Personnel Actions and Employee Status

Setting Up the Hiring Process

Before you hire employees, set up the control tables described in "Setting Up the Administer Workforce Business Process and "Setting Up Country-Specific Tables."

You may also want to set up additional tables for the hiring process.

See Also

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

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Jobs and Pay Groups"

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Companies, Agencies, and Locations"

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Banks and Bank Branches"

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

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Multiple Jobs"

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Regulating PeopleSoft HRMS System Data"

User Security Considerations

PeopleSoft Human Resources enables human resources administrators to hire employees into departments that they can't access for updates. This enables them to transfer employees from one department to another without undue difficulty.

If you want to prevent administrators from hiring employees into departments to which they don't have access, the system contains an optional view (DEPT_TBL_ACCESS) that shows only the department IDs. The administrator can access the view based on user security. To use this view, update the JOB record in PeopleSoft Application Designer so that the prompt table for the DEPT_ID field is DEPT_TBL_ACCESS.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Administering PeopleSoft Security

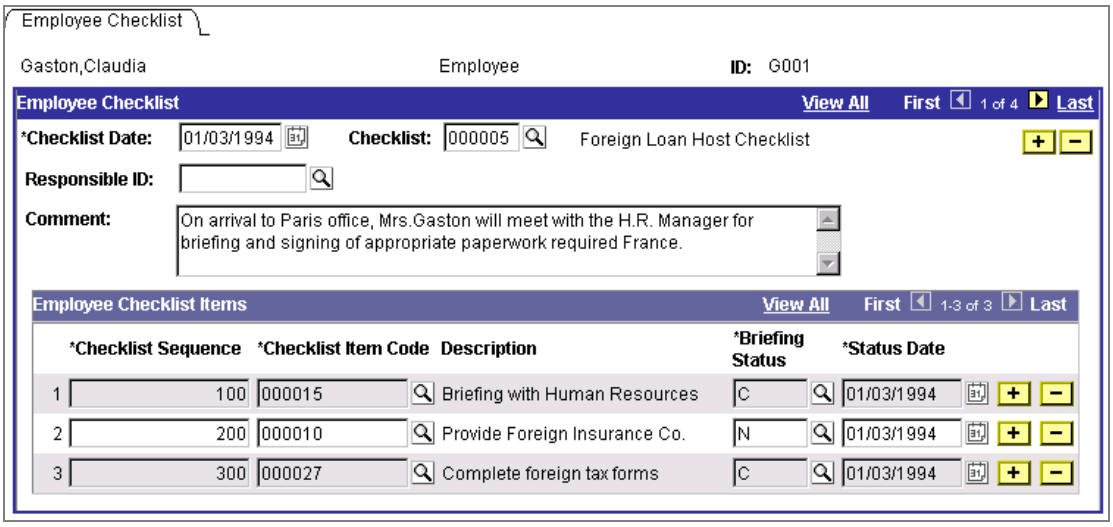
PeopleTools PeopleBook: Security

Page Used in Setting Up Employee Checklists

Page Name	*Object Name*	*Navigation*	*Usage*
Employee Checklist	EMPLOYEE_CHECKLIST	Administer Workforce, Administer Workforce (GBL), Use, Employee Checklist, Employee Checklist Administer Workforce, Administer Workforce (USF), Use2, Employee Checklist, Employee Checklist Administer Workforce, Track Global Assignments (GBL), Use, Employee Checklist, Employee Checklist Administer Workforce, Track Global Assignments (USF), Use, Employee Checklist, Employee Checklist	Create checklists for processing employee hires and other administrative tasks. Use standard checklists you've already created in the Checklist Table, or modify them for particular employee processing requirements. You must have assigned an employee ID before you can create an employee checklist.

Setting Up Employee Checklists

Access the Employee Checklist page.



Employee Checklist Page

Checklist Date — Enter the date the checklist was created. The default is the current date.

Checklist — Enter a checklist code to use a standard checklist you've created in the Checklist table. Use an existing list or modify it to create a new employee checklist. To create a new checklist, leave the field blank. Then enter all checklist item information in any order you choose.

Checklist Seq (checklist sequence) — The system enters this if you enter a checklist code.

Checklist Item — The system enters this if you enter a checklist code. To add new items to a standard checklist, insert a data row between items in the checklist and enter a new sequence number that falls between the existing numbers. Or add a new data row at the end of the list. Then enter all pertinent checklist item information.

Briefing Status — Select a status.

Status Date — Enter the date when the briefing status was achieved.

Responsible ID — Select or enter the employee ID of the person responsible for creating and carrying out the items on the checklist.

Comment — You can enter comments longer than the three lines shown.

See Also

"Setting Up the Administer Workforce Business Process," Creating Checklists

CHAPTER 5

Hiring Your Workforce

This chapter discusses how to:

- Assign employee IDs.
- Hire an employee.
- Enter employee personal data.
- Enter job data.
- Enter employment data.
- Distribute job earnings.
- Specify benefits program participation.
- Add nonemployees.
- Set up a nonemployee provider.
- Add job applicants.
- Add concurrent jobs.

Note. This chapter describes the pages in the Hire component, which you use when you add a new record to PeopleSoft Human Resources. Many of these pages provide links to information that you enter or use in other PeopleSoft Human Resources business processes. Federal users should refer to the chapter "USF – Hiring Employees."

Note. French Public Sector (FPS) users should complete the hiring process using the Administer Workforce (FPS) menu. Only the first step (creating an employee ID and entering personal data) of the FPS hiring process is documented here.

See Also

"(USF) Hiring Employees"

PeopleSoft Human Resources PeopleBook: Manage French Public Sector, "Hiring French Public Sector Employees "

Common Elements Used in This Chapter

Personal Data

Military Status	Select the employee's current military status.
Smoker and **As of**	Indicate if the employee is a smoker and enter the date the he or she started smoking. An employee's smoker status affects benefits eligibility and rate determination in Peoplesoft Base Benefits and is required for regulatory reporting.
Regulatory Region	Select the regulatory region.
Ethnic Group	Select the ethnic group. You set up ethnic groups on the Ethnic Groups page.
Religion	Select the religion. You set up religions on the Religions page. Workplaces in Australia and New Zealand set this field to ***Not Applicable.***

Job Data

Cross Border Worker	Select if the employee lives in one country and works in another. These employees have special tax or social security needs.

Employee Data

Security Clearance	If the employee has received a security clearance, enter the level of clearance: ***Classified, Secret,*** or ***Top Secret.***
Owns 5% (Or More) of Company	Select if the employee owns 5 percent or more of the company. The system uses this field to identify highly compensated employees for the Non-Discrimination Testing - 401(k)/401(m) report (NDT004) in the Benefits feature of PeopleSoft Human Resources.
Festive Advance Pay Program	Select the festive advance pay program for the employee.
FA Holiday Type (festive advance holiday type)	Select the festive advance holiday type.
Festive Advance Eligible From	Select the date that the employee becomes eligible for the selected festive advance pay program.

See Also

PeopleSoft HRMS PeopleBooks Preface, "About These HRMS PeopleBooks," PeopleBooks Standard Page Element Definitions

Assigning Employee IDs

When you open the Hire component, the system requests enter an employee ID, a unique identifying code that you use to track an employee's records throughout PeopleSoft Human Resources. There are two ways to assign ID numbers:

- Automatically: If you use automatic ID assignment, the system adds IDs sequentially as you hire new employees. The system maintains the last assigned ID in Installation Table 2.

    - Manually: You enter the employee IDs, using whatever system you choose for your organization. With manual entry, you don't need to assign IDs sequentially. Assigning IDs manually is the only way you can include characters in the IDs.

Note. To avoid maintaining two different sets of employee IDs, we recommend that you use only one method to assign them: Either always assign them manually or always let the system assign them.

Assigning Employment Record Numbers

The system uses employment record numbers to track each job that an employee holds. When you hire an employee, the system assigns the new job employment record number *0*.

Later, when you add other jobs to the system, you must assign each job a unique employment record number. The system assigns the number automatically if you enter the employee ID on the Search page when you add a concurrent job, in the Add Concurrent Job component in Administer Workforce or in the Home/Host Data component in Track Global Assignments. The new employment record number is the employee's highest existing number, plus 1. You can override this number. You can also enter employment record numbers manually.

See Also

Working With Multiple Employment Record Numbers

(JPN) Assigning Internal Employee IDs

This feature enables you to use employee IDs that have some meaning when you implement PeopleSoft Human Resources. For example, the third digit of an employee ID may indicate employment type; the fifth might indicate work location; and the sixth, job type. You can store a standard PeopleSoft employee ID—which doesn't have meaning and is used for keying

the database—and an alternative, meaningful employee ID that can be changed as the employee's circumstances change.

Note. To use an internal employee ID as an alternate search key, you modify the search record of each component (such as Personal Data and Job Data) by changing EMPLMT_SRCH_GBL to EMPLMT_SRCH_JPN and PERS_SRCH_GBL to PERS_SRCH_JPN.

Following are some examples of employee changes that can be handled in Peoplesoft Human Resources.

Employee ID Changes at Rehire

When an employee's employment type is changed, such as from part-time employee to regular employee, even in the same company, the change is usually processed by first terminating and then rehiring the employee. When you rehire the employee, his or her ID usually changes because the ID has specific meanings.

Rehiring can occur immediately following termination or after a period of time. If rehiring occurs immediately after termination, the employee's personal and family data usually doesn't change between termination and rehire, so you must maintain this data after you change the employee's ID. If a period of time elapses between termination and rehiring, you can enter new data after rehiring.

Regardless of when you rehire the employee, you must be able to view all the employee's data. Also, you need to be able to distinguish the hire date, termination date, and termination action reason because such data is required to calculate retirement allowance. Similar data is required for calculating years of service.

When you change an employee's ID, you need a connection between the previous ID, which must remain accessible, and the new ID. Otherwise, the previous ID might remain recorded in documents and data outside of PeopleSoft after the change. Also, you must record the effective term, or period, of each employee ID because, for each ID that an employee held (or holds), you often need to know when the Job data became effective or ineffective.

Example

An employee has two employee IDs: a PeopleSoft standard employee ID and an *internal employee ID,* which the company uses to keep track of ID changes to the employee's employment situation. When the employee ID needs to be changed, you enter the new employee ID in the Internal Employee ID field.

You can see those changes at a glance on the employee's Job Summary page, and you can search employees by their internal employee ID.

In the following table, in the Internal EmplID (employee ID) column, the *2* in *20091* indicates part-time employment, and the *94* in *94010333* indicates the year (1994) that the employee was rehired as a full-time employee.

Effective Date	Action	Reason	EmplID	Internal EmplID	Notes
1998/04/01	Pay Rate Change	Merit	45883	94010333	
1994/04/01	Rehire	NPS	45883	94010333	Rehired as full-time employee.
1994/03/31	Termination		45883	20091	
1990/04/01	Hire	TMP	45883	20091	Hired as temp employee.

Employee ID Changes at Permanent Intercompany Transfer

In a group of companies, employees can terminate employment by their home company and be hired by another—host—company. Usually the hire by the host company occurs immediately after termination by the home company.

When an employee joins the host company, that company usually assigns the employee a new employee ID, rather than keeping the ”old,” home company ID, because different companies often have different employee ID numbering systems.

Employee ID Changes Not Due to Termination

When an employee’s job type or work location changes, the change is always instantaneous, unlike with termination and rehire, where there may be a delay. For example:

- Job Type: from Sales to Technical; from Support to Sales.
- Work Location: from Tokyo to Osaka; from Fukuoka to Nagoya.

When part of the employee ID indicates job type and/or work location, you must change the employee ID when the job type or work location changes.

Hiring an Employee

The hire component includes five sections:

- Personal Data

  The fields that the system displays on these pages vary, depending on your implementation. Not all the fields described in the following sections are visible when you view the pages.

- Job Data
- Employment Information
- Earnings Distribution
- Benefits Program Participation

Note. The pages in the Hire component are identical to those in the Job Data and Personal Data components and share the same object names. The only difference is that you use one set of pages when hiring an employee and another to update employee information.

See Also

"Overview of the Hiring Process"

"Updating Workforce Information"

"Setting Up the Administer Workforce Business Process"

"Setting Up Country Specific Tables"

Pages Used to Hire an Employee

Page Name	*Object Name*	*Navigation*	*Usage*
Name History	PERSONAL_DATA1	Administer Workforce, Administer Workforce (GBL), Use, Hire, Name History Administer Workforce, Administer Workforce (FPS), Use, Hire, Name History	Record an employee's name and marital status.
Address History	PERSONAL_DATA1B	Administer Workforce, Administer Workforce (GBL), Use, Hire, Address History Administer Workforce, Administer Workforce (FPS), Use, Hire, Address History	Enter information about an employee's home address.
Personal History	PERSONAL_DATA2	Administer Workforce, Administer Workforce (GBL), Use, Hire, Personal History Administer Workforce, Administer Workforce (FPS), Use, Hire, Personal History	Enter personal information about the employee.

Page Name	*Object Name*	*Navigation*	*Usage*
Identify/Diversity	PERSONAL_DATA3	Administer Workforce, Administer Workforce (GBL), Use, Hire, Identity/Diversity Administer Workforce, Administer Workforce (FPS), Use, Hire, Identity/Diversity	Establish an employee's eligibility to work and verify an employee's identity.
Work Location	JOB_DATA1	Administer Workforce, Administer Workforce (GBL), Use, Hire, Work Location Click the Job Data link at the bottom of any page in the hiring component.	Enter information about the employee's job, including the position, regulatory region, company, department, and location.
Job Information	JOB_DATA_JOBCODE	Administer Workforce, Administer Workforce (GBL), Use, Hire, Job Information Click the Job Data link at the bottom of any page in the hiring component.	Enter information about the employee's job, including employment status, employee class, shift, or standard hours.
Job Labor	JOB_LABOR	Administer Workforce, Administer Workforce (GBL), Use, Hire, Job Labor	If the employee belongs to a National Labor agreement, enter data about the agreement.
Payroll	JOB_DATA2	Administer Workforce, Administer Workforce (GBL), Use, Hire, Payroll Click the Job Data link at the bottom of any page in the hiring component.	Enter employee payroll processing data. The payroll system and pay group information that you enter here affects component compensation processing on the Compensation page.

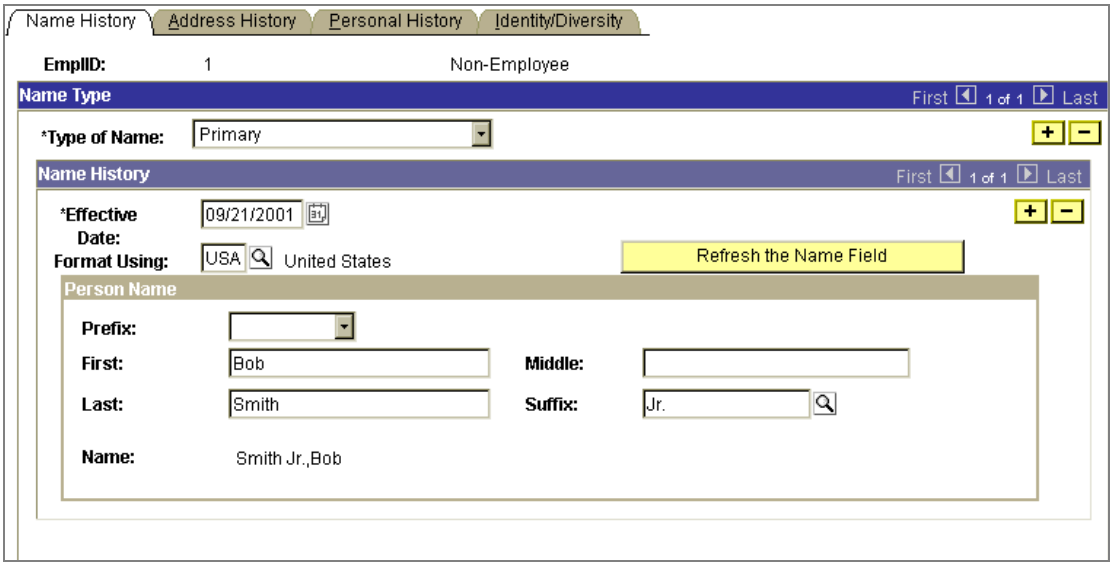
Page Name	*Object Name*	*Navigation*	*Usage*
Salary Plan	JOB_DATA_SALPLAN	Administer Workforce, Administer Workforce (GBL), Use, Hire, Salary Plan Click the Job Data link at the bottom of any page in the hiring component.	Enter information about the employee's salary plan.
Compensation	JOB_DATA3	Administer Workforce, Administer Workforce (GBL), Use, Hire, Compensation Click the Job Data link at the bottom of any page in the hiring component.	Enter employee compensation data.
Employment Information	EMPLOYMENT_DTA1	Administer Workforce, Administer Workforce (GBL), Use, Hire, Employment Information Click the Employment Data link at the bottom of any page in the hiring component.	Enter optional employment-related data, such as the employee's business title and supervisor.
Job Earnings Distribution	JOB_DATA_ERNDIST	Administer Workforce, Administer Workforce (GBL), Use, Hire, Job Earnings Distribution Click the Earnings Distribution link at the bottom of any page in the hiring component.	Distribute the employee's compensation for one job among different departments, job codes, accounts, shifts, position numbers, or general ledger pay types. If the employee's pay is regularly charged to more than one cost center, designate how much to allocate to each cost center.

Page Name	Object Name	Navigation	Usage
Benefits Program Participation	JOB_DATA_BENPRG	Administer Workforce, Administer Workforce (GBL), Use, Hire, Benefit Program Participation Click the Benefits Program Participation link at the bottom of any page in the hiring component.	Specify the benefit program in which the employee is enrolled for benefits in PeopleSoft Human Resources or in PeopleSoft Benefits Administration.

Note. These pages are also available through the following navigation paths: Administer Workforce, Administer Workforce, Use, Add Non-Employee; Administer Workforce, Administer Workforce, Use, Add Concurrent Job; and Develop Workforce, Recruit Workforce, Use, Hire Applicant.

Entering Name Information

Access the Name History page.



Name History page

Note. Because many fields in the Hire component are required, complete *all* the hiring pages before you save your entries.

EmplID — If you are hiring a new employee and have instructed the system to assign IDs, the field displays the value ***NEW*** until you save this record. Otherwise, the system displays the value that you entered to access the page.

Name Type

Type of Name — Select the type of name; for example ***Primary.***

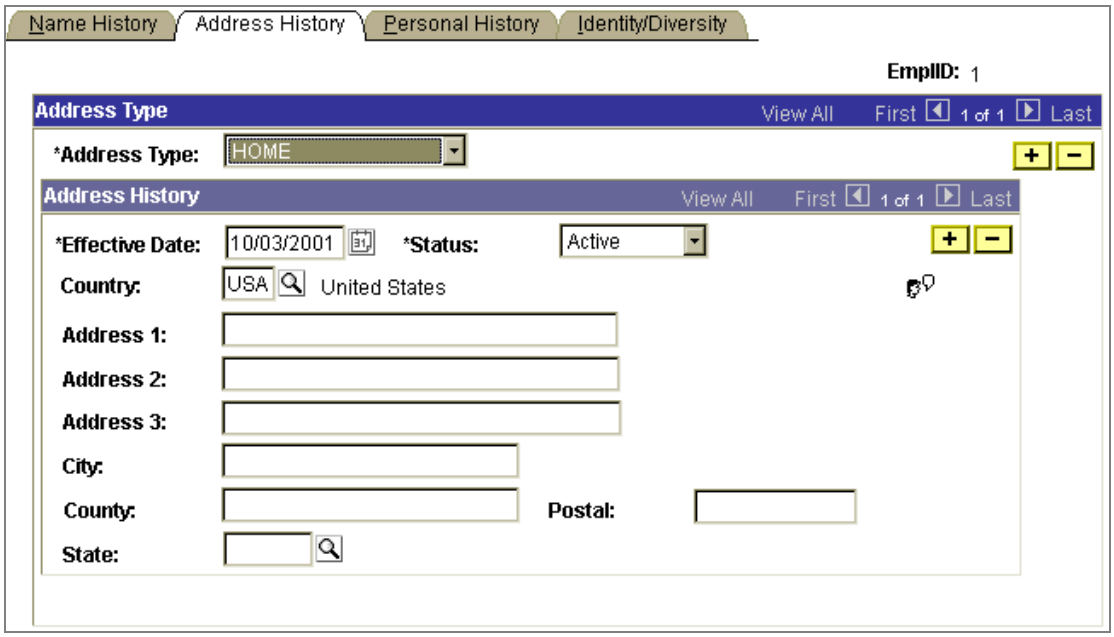
Refresh the Name Field — After entering the name information, click this button. The system displays the employee name in the **Name** field.

See Also

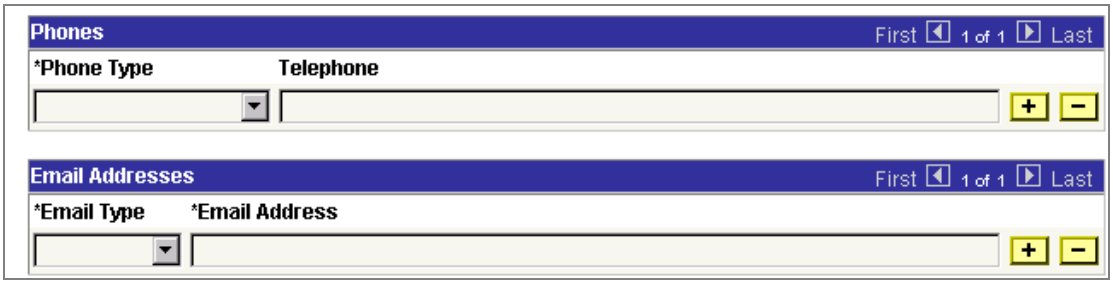
PeopleSoft HRMS PeopleBooks Preface, "About These HRMS PeopleBooks," PeopleBooks Standard Page Element Definitions

Entering Address Information

Access the Address History page.



Address History page (1 of 2)



Address History page (2 of 2)

Note. Laws in Belgium, the Netherlands, and Japan require maintaining effective-dated address information for employees.

Phones

Telephone — Enter the phone number. The system formats the number based on the standard phone number format for the country that you selected on the Personal Data - Address page. If no special formatting is specified for the selected address country, the format is ***000/000-0000.***

(JPN) Note. Phone numbers are custom format fields. If you enter a phone number without any hyphenation (such as *9256944023*), the system reformats the number into the standard format for the selected country (for example, the U.S. format, *925/694-4023.* Because a 10-digit phone number in Japan can be formatted in several ways *(03-1234-5670, 045-123-4567, or 0567-21-1234),* this automatic formatting doesn't work for Japanese phone numbers. Japanese customers who want to store telephone numbers exactly as they are entered, without automatic formatting, should modify the **Telephone** field manually using PeopleSoft Application Designer.

Email Addresses

Email Type and **Email Address** — Select and email type and enter the employee's email address.

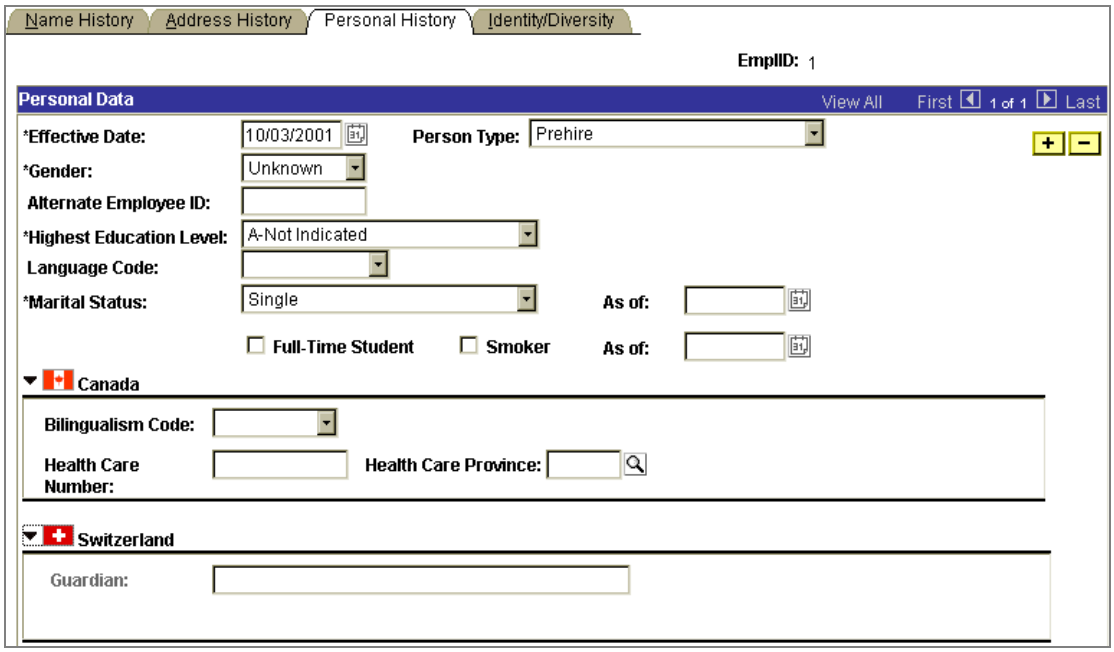
Note. If an employee has more than one address, click the **Add (+)** button after selecting **Address Type.**

See Also

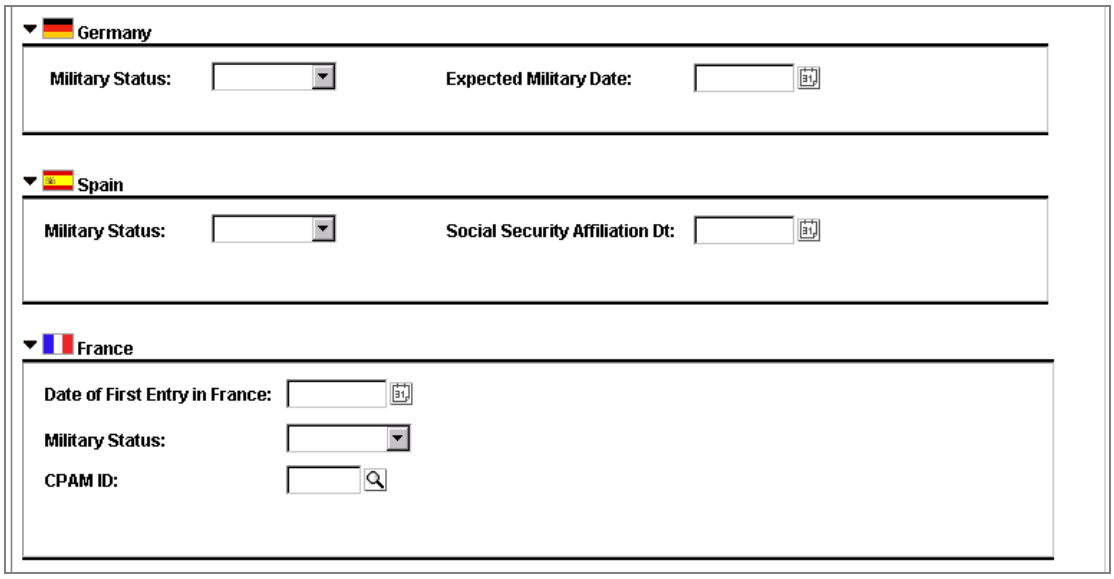
PeopleSoft HRMS PeopleBooks Preface, "About These HRMS PeopleBooks," PeopleBooks Standard Page Element Definitions

Entering Personal Data

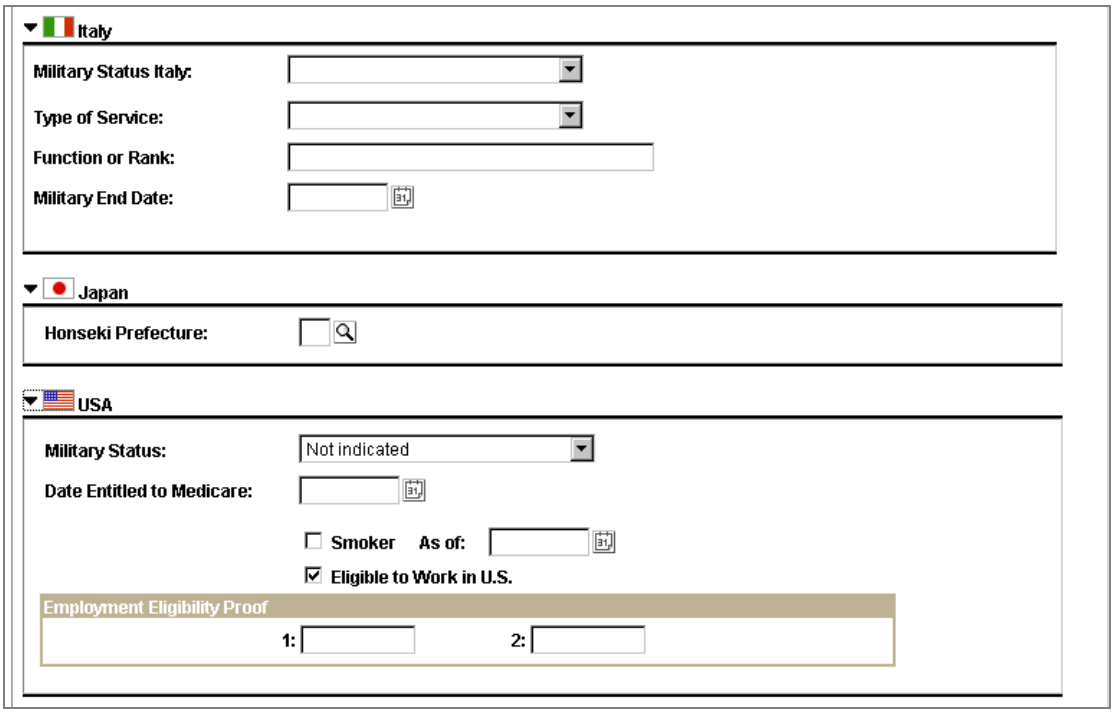
Access the Personal Profile page.



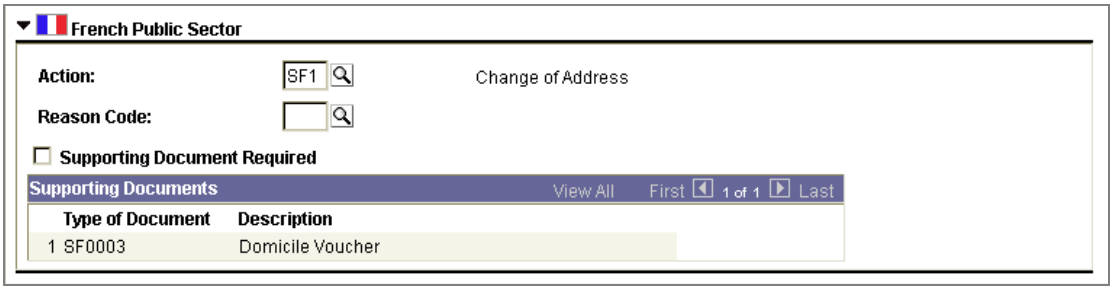
Personal History page (1 of 4)



Personal History page (2 of 4)



Personal History page (3 of 4)



Personal History page (4 of 4)

Alternate Employee ID To use a second type of ID for an employee, enter the ID.

Highest Education Level Select a value.

(JPN) Note. For Japanese education-level age-related pay calculations—a form of seniority pay—these values are linked to an education-level age basis as of hire.

Language Code

Select the employee's native or preferred language. Although tracking official or preferred languages is required in some countries in PeopleSoft Human Resources, the system also uses the preferred language when you communicate with workers in your organization. For example, PeopleSoft Global Payroll for Germany and Switzerland use the language code to print paychecks in the employee's preferred language. Other types of workforce communication also use this as the default language for written communication.

Note. Don't use this field to record your organization's official language or to rate a worker's proficiency in speaking, reading, or writing various languages. Use the Location Table to track your organization's official language. Use the Languages Table to record a worker's language proficiency.

Marital Status

Select the employee's marital status. Values are ***Common Law, Divorced, Head of Household, Married, Separated, Single, Unknown,*** and ***Widowed.*** When a marital status is changed, the default **As of** date is the same as the Personal Data **Effective Date.**

PeopleSoft Payroll doesn't use the marital status that is entered on this page for tax calculations. For U.S. employees, you enter that information in Maintain Payroll Data on the Federal, State, and Local Tax pages. Taxes for Canadian employees are based on net claim amount, which varies depending on the employee status.

As of

Enter the date that the marital status is effective. Laws in the Netherlands require tracking effective-dated marital status information for employees.

Full-Time Student

Select if the employee is a full-time student.

(CAN) Canada

Bilingualism Code

Record the appropriate code for the employee. If the Official Languages Act applies to your organization, use the bilingualism code as part of the Official Languages reports (PER102CN and PER108CAN) that you submit to the government.

Health Care Number and **Health Care Province**

Enter a number and select the health care province.

(CHE) Switzerland

Guardian — Minors who are age 18 or younger or people with mental illness must have a parent or guardian sign employment contracts on their behalf. Enter the name of the parent or guardian who is authorized to act for this employee.

(GER) Germany

Military Status — Select the employee's current status.

Expected Military Date — If the employee hasn't already completed military service, enter the date when service is expected to begin.

(ESP) Spain

Social Security Affiliation Dt (social security affiliation date) — Enter the date when the employee was assigned a Spanish Social Security number.

(FRA) France

Date of First Entry in France — Leave blank if the employee is a native-born French citizen. If the employee is a foreign worker, enter the date that the employee first arrived in France. This data is used to maintain work visa information for foreign workers who are employed in France.

CPAM ID (Caisse Primaire d'Assurance Maladie ID) — Enter the code of the CPAM ID that is assigned to the employee. CPAM depends on the employee's home address. The CPAM is the social security body that compensates the employee for illness and work accidents.

(ITA) Italy

Type of Service — Select the type of service that the employee performed in the military.

Function or Rank — Enter the function or rank that was held by the employee in the military.

Military End Date — Indicate the date that the employee's military service ended, if applicable.

(JPN) Japan

Honseki Prefecture — Select the family prefecture, or place of registration. Tracking a worker's Honseki Prefecture is a matter of custom and law in Japan. The Japanese government maintains an official document called the Family Register, which explains the relationships within Japanese families. Parents update this document for their children, and parents are required to include the family address in the

register. Use this field to record from which prefecture the worker's family comes.

(USA) USA

Date Entitled to Medicare (Optional) Enter the date that this employee is entitled to receive Medicare coverage.

Eligible to Work in U.S. Select if the employee is eligible to work in the U.S.

Employment Eligibility Proof U.S. law requires entering two forms of identification (for example, passport and Social Security card) to prove the employee's eligibility to work in the United States.

(FPS) French Public Sector

Supporting Document Required Select to track supporting documents. A row is inserted in the **Supporting Documents** group box. The row is identified by the employee ID, the action code, and the effective date and enables you to verify that the employee has provided the required documents.

See Also

"Setting Up Country Specific Tables," Maintaining French Social Security Tracking Codes

PeopleSoft HRMS PeopleBooks Preface, "About These HRMS PeopleBooks," PeopleBooks Standard Page Element Definitions

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "(CAN) Meeting Regulatory Requirements for Canada"

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Local Country Functionality," (JPN) Setting Up Japanese Control Tables

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Your HRMS System," Understanding Effective Dates

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Languages."

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Regulating PeopleSoft HRMS System Data"

PeopleSoft Payroll for North America PeopleBook, "Maintaining Payroll Data "

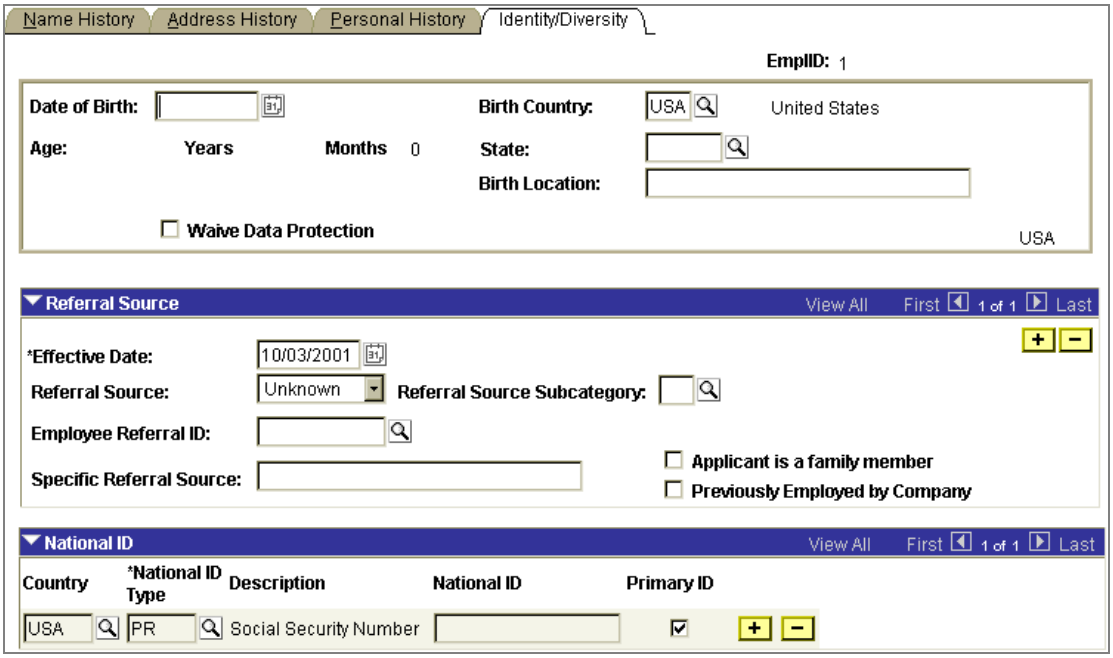
PeopleSoft Human Resources PeopleBook: Base Benefits, "Setting Up Benefit Support Tables"

PeopleTools PeopleBook: Introduction to PeopleSoft Reporting

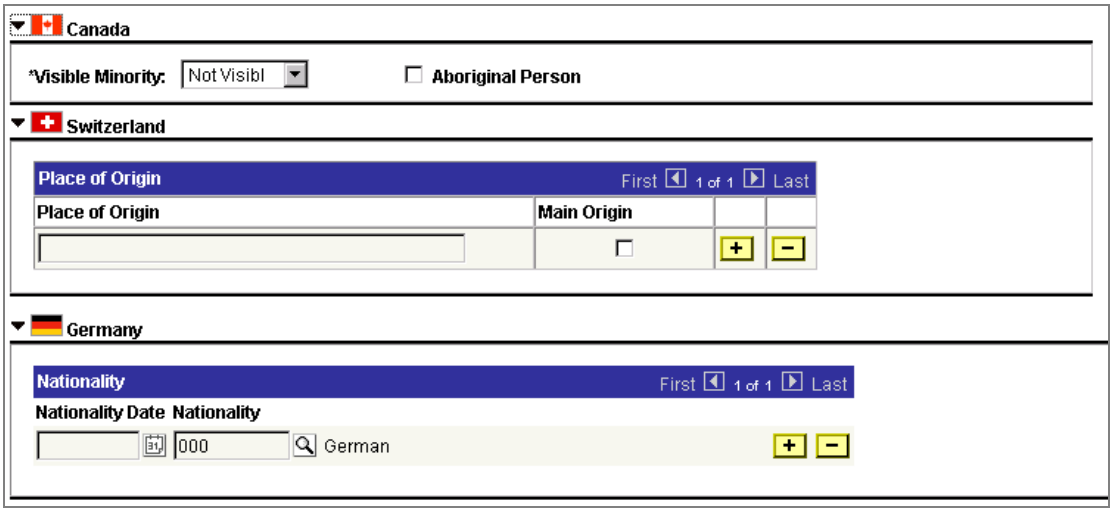
PeopleTools PeopleBook: Globalization

Establishing Work Identity and Diversity

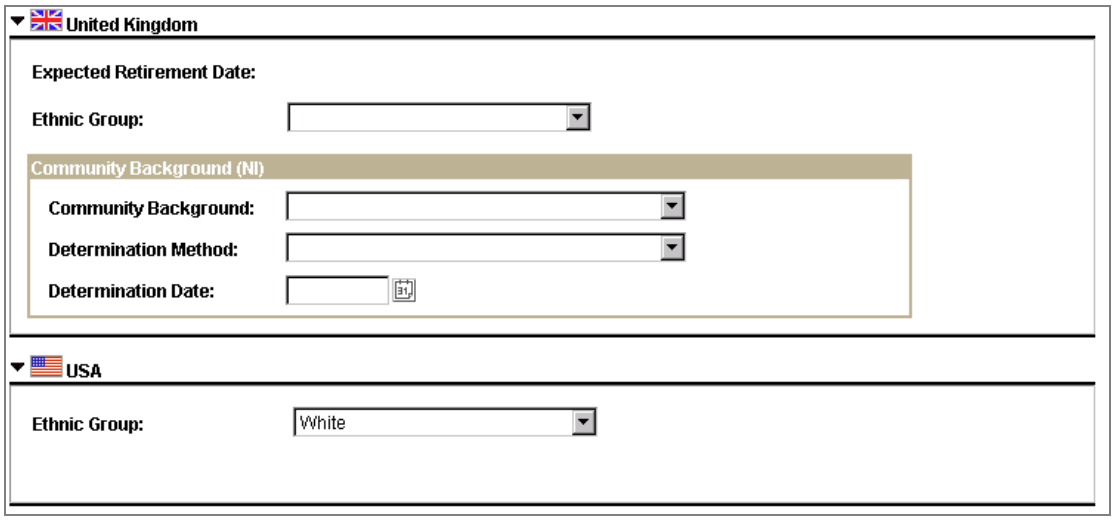
Access the Identity/Diversity page.



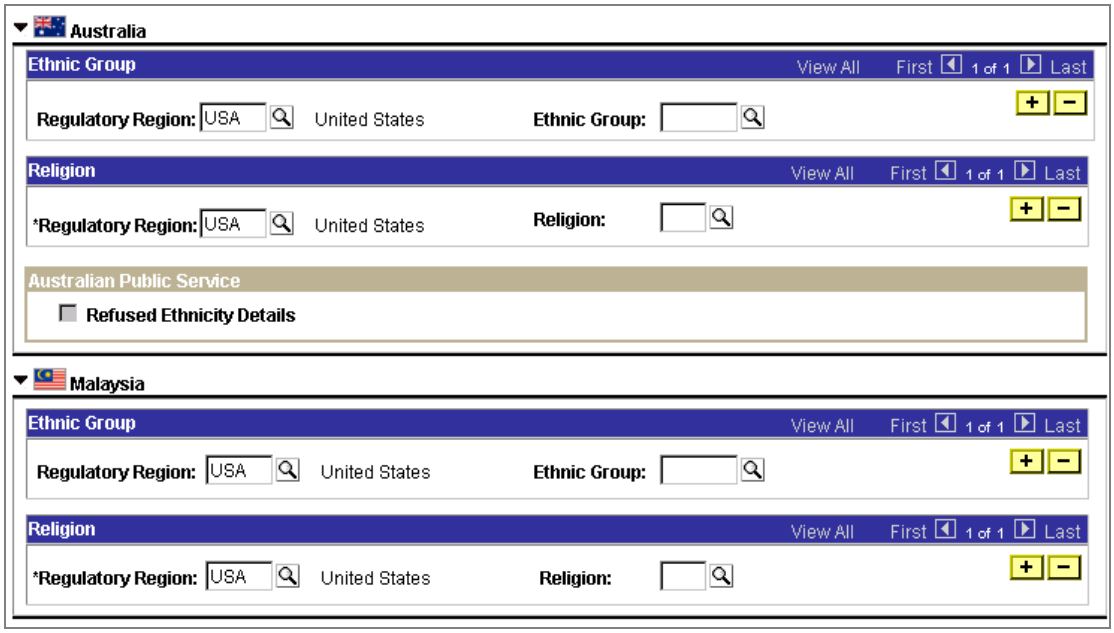
Identity/Diversity page (1 of 5)



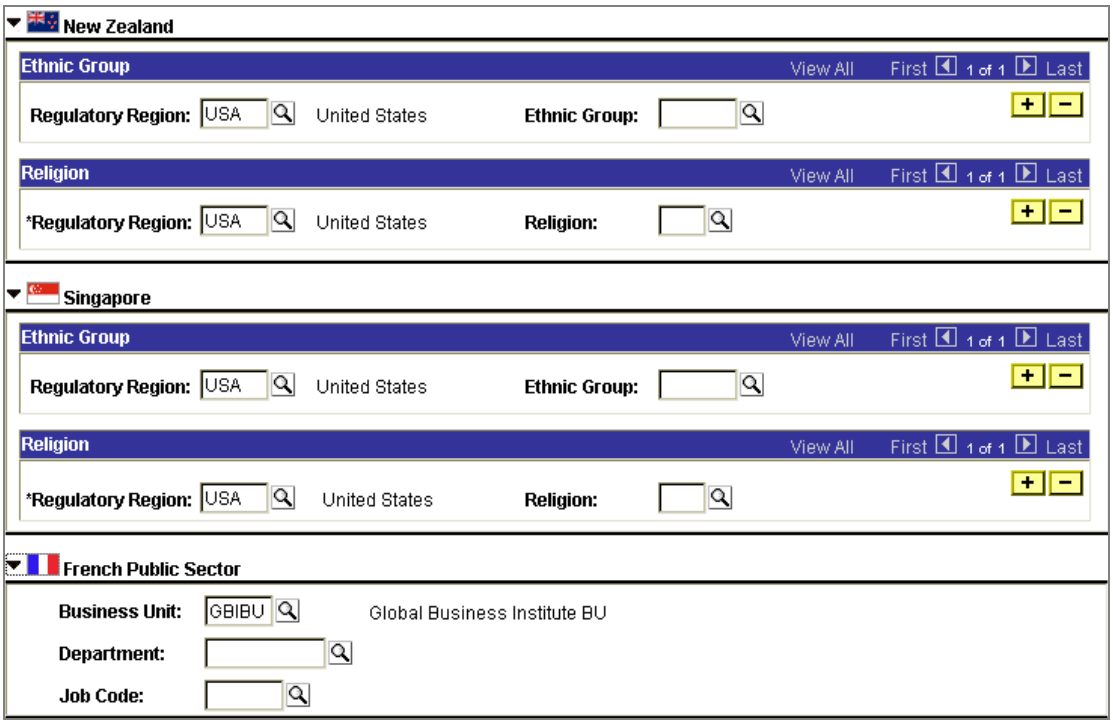
Identity/Diversity page (2 of 5)



Identity/Diversity page (3 of 5)



Identity/Diversity page (4 of 5)



Identity/Diversity page (5 of 5)

Local country laws that require employers to verify an employee's nationality and eligibility to work in that country might require information that you enter here. Much of the data that you enter is required for regulatory reporting in PeopleSoft Human Resources.

Date of Birth Enter the employee's date of birth. If you leave this field blank, a warning message appears when you save the record. You can continue entering information after you acknowledge the message. Though the birth date isn't required for the Administer Workforce business process, the system uses it to calculate an employee's age in some benefit and payroll tasks. It also calculates dates, such as the UK expected retirement date, based on the employee's age.

Birth Country Select a country. Based on the selected country, the system might display additional fields.

Age When you enter a birth date, the system calculates the employee's age, in years and months.

Birth Location Usually a city, town, or village.

Date of Death Leave blank unless applicable.

Waive Data Protection European community employment and personal privacy legislation specifies that personnel information can't be passed across countries in the European Union without authorization from the employee. Select this check box if

	you've obtained the employee's consent to share personal data with users in other European Union member nations.

Referral Source

Referral Source	Specifies how the employee found out about your organization.
Referral Source Subcategory	Select a referral source subcategory, if applicable.
Employee Referral ID	If a current employee referred the new employee, enter the ID of the employee who made the referral.
Specific Referral Source	If someone personally recommended an applicant, enter the person's name.
Applicant is a family member	Select if the applicant is related to the referring employee.
Previously Employed by Company	Select if the applicant was previously employed by the company.

National ID

Country	Select the country that issued the worker's national ID.
National ID Type	The system enters the value that you established for this country on the National ID Type Table Page. You can override this default.
National ID	Enter the worker's national ID number. The system checks the format of your entry against the default format that you entered on the National ID Type Table Page.
Primary ID	Select if the national ID is the employee's primary ID. If this is the only data row for this employee, the system selects the check box by default. You can clear it.

Verifying Social Insurance Numbers for Canadian Employees

Invoke a modulus 10-check digit formula to verify an employee's Social Insurance Number (SIN), if needed. The formula follows federal standards for using the ninth digit in an employee SIN to verify the number.

If you enter an employee SIN that doesn't match the check digit that is calculated by the formula, an error message appears.

Verifying Social Security IDs for Dutch Employees

The Dutch National ID is commonly called the SoFi (Social/Fiscal) number. You can invoke the 11-check digit formula to verify a Dutch employee's SoFi number. The 11-check formula is a mathematical formula that evaluates your entry for the employee's Social Security ID and verifies that the result of the calculation is 11, to determine whether the national insurance/social security ID has a valid format.

(CAN) Canada

Visible Minority Select a code to indicate if the employee's ethnic background is apparent based on physical appearance.

Aboriginal Person Select if the employee is a Canadian aboriginal person.

(CHE) Switzerland

Place of Origin Every Swiss person has at least one place of origin, usually determined by the father or husband's birthplace.

Main Origin Select if the place of origin in the **Place of Origin** field is the employee's main place of origin. (A person can have more than one place of origin.)

(GER) Germany

Nationality Date Enter the effective date of the employee's nationality status. If the employee is a native citizen of the country, enter the employee's birth date. If the employee is a naturalized citizen, enter the date that the employee became a citizen.

Nationality Enter the employee's nationality by selecting a nationality code. German labor laws require recording an employee's nationality to determine if the employee is eligible to work in certain industries, particularly those related to technology or defense. Use the nationality code to determine the employee's eligibility to work in a regulated industry based on the employee's country's participation in OECD or the European Union. You can maintain information about whether each nationality code participates in the OECD and European Union.

Note. Duevo-compliant nationality codes are established by the Duevo Directive and are provided by PeopleSoft.

(GBR) United Kingdom

Expected Retirement Date The system calculates and displays this value, based on the system date and the birth date that you entered earlier on this page. This field is for information only; you can't change it.

Ethnic Group Select an ethnic group.

(GBR) Understanding the UK Retirement Date Calculation

The employee's expected retirement date is based on the birth date that you entered on the Personal Data - Identity/Diversity page. For men in the U.K., the expected retirement date is always the 65th birthday. For women, it is the 60th birthday. The British government is introducing measures to raise the state pension age for women. The retirement age for women

will gradually increase to 65 years between 2010 and 2020. The table below shows the expected retirement dates for women in the UK.

Birth Date	*Expected Retirement Age*
Before April 6, 1950	60 years.
After April 6, 1950 and before April 6, 1955	Retirement date is delayed one month for each month that the woman was born after April 6, 1950.
After April 6, 1955	65 years.

The calculation that the system uses to determine the retirement age of UK employees is stored in FUNCLIB_HR_UK.EXP_RETIRE_DT.FieldFormula.

(GBR) Community Background

The system displays the following fields only if you're logged in as an authorized user. Northern Ireland law requires that only a designated monitoring officer see community background data for employees. We have included a special user class (UKNIPNLS) and user ID (UKNI) in the system for you to use to enforce these rules.

Community Background Select the worker's community background: ***Protestant, Catholic,*** or ***Undetermined/Other.***

Determination Method Select the method you used to determine the worker's community background:

Direct Question: You asked the employee directly.

Residual: You looked at the first school that the employee attended.

Residual 2nd School: You looked at the second school that the employee attended.

Residual Other: You determined the employee's community background in some other way.

Determination Date Enter the date that you determined the employee's community background category.

The data that you enter about a Northern Ireland worker's community background is required under the Fair Employment Act. Employers must include this information in the Northern Ireland report (UKNI001) that they submit to the administrative body that monitors employment in Northern Ireland. This report gives an annual summary of the state of the workforce for a particular employer and breaks down employees and applicants for employment into their respective community background categories.

(USA) USA

Ethnic Group	Select the employee's ethnic group. Values are based on US Federal Equal Employment Opportunity ethnic categories. Use ethnic group information to compile the Establishment's Affirmative Action (AA) Plan and to generate several Equal Employment Opportunity (EEO) reports.

(AUS) Australia

Ethnic Group	Select the ethnic group. For producing Affirmative Action reports, the ATSI (Aboriginal and Torres Strait Islander) code comes from this page.
Refused Ethnicity Details	Select if the employee refuses to provide ethnicity details.

(MYS) Malaysia and (SNG) Singapore

In Malaysia and Singapore, **Ethnic Group** and **Religion** are used for eligibility and calculation of festive advances. You can also set up an employee's default religion and ethnic group using the Personal Data - Identity/Diversity page.

(FPS) French Public Sector

The information entered here is mandatory for include the employee in the French Public Sector security system.

See Also

"Updating Workforce Information," Entering Deaths

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "(AUS) Meeting Regulatory Requirements for Australia"

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "(CAN) Meeting Regulatory Requirements for Canada"

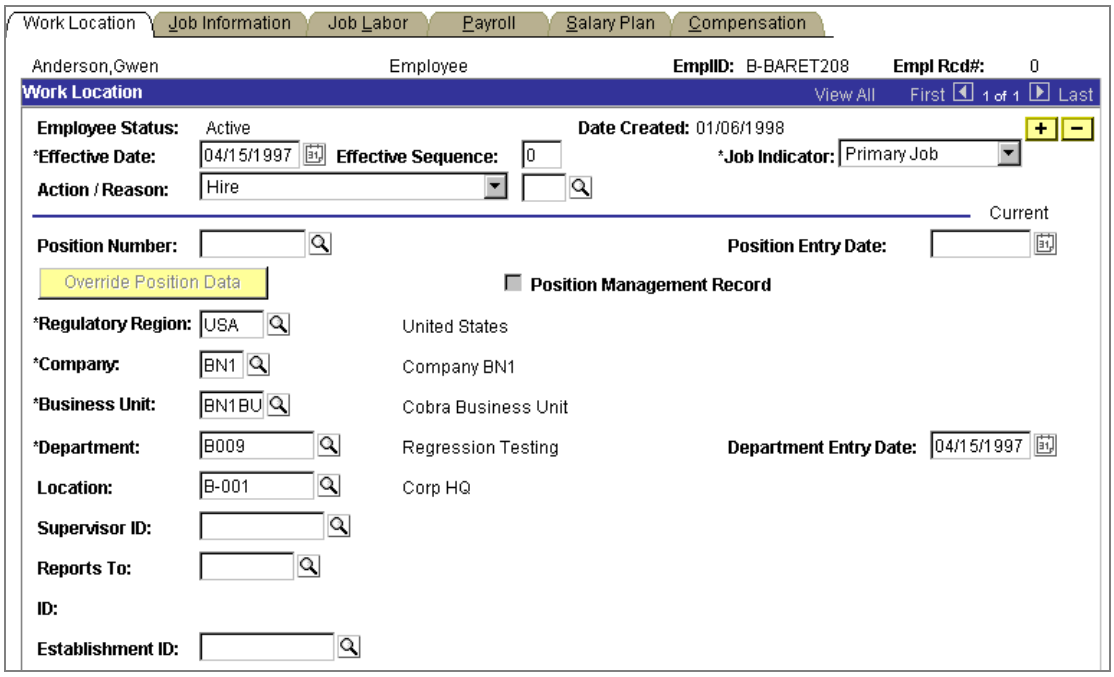
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PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "(GBR) Meeting Regulatory Requirements for the United Kingdom"

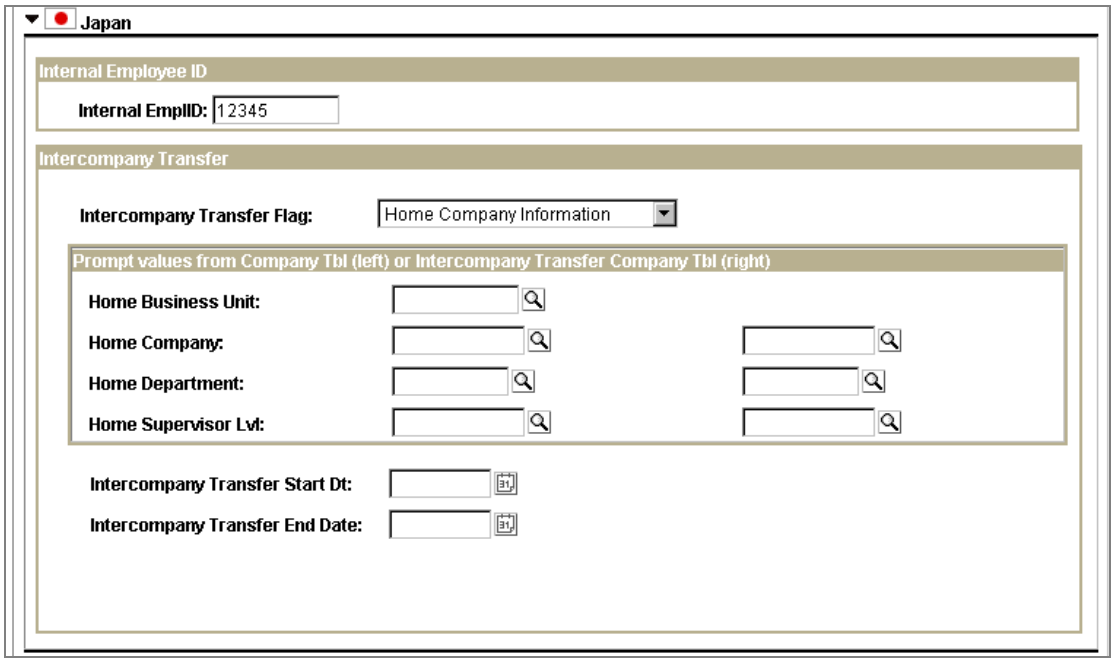
PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "(USA) Meeting Regulatory Requirements for the United States"

Entering Employee Job Location Information

Access the Work Location page.



Work Location page (1 of 2)



Work Location page (2 of 2)

Effective Date When you hire an employee, the effective date that you enter here becomes the hire and original hire date.

Effective Sequence Use this number to track multiple administrative actions that occur on the same day. The default value is ***0,*** the correct number for new employees.

Job Indicator Indicate whether this is the employee's primary or secondary job. Select ***N/A*** (not applicable) if those selections don't apply to this job. The system hides this field if you haven't selected the Multiple Jobs Allowed option on the Installation Table – HRMS Options page.

Action/Reason Select the action requiring you to create or modify this record. The system displays ***Hire*** by default (the appropriate entry when hiring an employee). You must enter an Action/Reason code when hiring an employee for a concurrent job.

Reason Code If you've defined reasons for actions on the Action Reason Table Page, select a reason code.

Action Dt The date that you entered this transaction.

Position Number If you're driving part or all of the system by position, select a position number. Define positions on the Position Data pages. When you leave the Position field, the system completes position-related fields in the Job Data component with default data from the Position Data pages, including job code, department, location, and full- or part-time. The corresponding fields become unavailable for entry.

You can make the switch to driving your system by position even if you initially set up your system to drive PeopleSoft Human Resources by employee. After setting up positions in PeopleSoft Position Management, assign employees to positions in this field.

PeopleSoft Human Resources issues a warning message if you assign an employee to a position that has already been filled by another employee and if a new employee appointment exceeds the maximum head count for that position. The system calculates the head count and shows the appropriate indicator in the Open/Filled field on the Position Data pages when you change employee assignments.

Position Entry Date When you leave this field, the system populates this field with the effective date. You can override it.

Override Position Data Click the Override Position Data button to enter exceptions to the default position data for this employee. This opens up the unavailable fields, including **Job Code** and **Department,** and you can override the entries in those fields. For example, the employee might have a higher salary grade than the standard grade that is associated with the position.

Note. If you override the defaults for position-related data, you must maintain the employee data manually—the

system doesn't update the position data on the Job pages with data from the Position Data pages until you clear this check box.

Position Management Record

The system selects this check box when you've made changes to fields on the Position Data pages that have initiated a system update of fields here. A selected check box indicates that the system has inserted a data row on the Job Data pages.

Company

If you assigned a company to a department in the Department Table, a default company code appears, and this field becomes unavailable for entry. If you didn't designate a company in the Department Table, select a company here.

Business Unit

If you've specified a business unit for a position, the system enters a default business unit and this field becomes unavailable for entry. If you haven't assigned the employee to a position, then the field is populated by default with the business unit for the employee based on your user preferences. You can override the default.

The business unit that you assign to the employee on this page and the setID functionality in PeopleSoft Human Resources Management affect the way that default values work throughout PeopleSoft Human Resources. Your entry in this field controls the departments, locations, job codes, salary plans, and so on that you see on the remaining Hire component pages.

Department

Select the code of the employee's department.

When you leave the field, the system inserts a default supervisor's ID on the Employment Data page if you've entered a default supervisor ID for this department in the Department Table.

The system enters default values for the following fields on the Job Data - Payroll page: Pay Months Per Year, Employee Type, Holiday Schedule (which you define in the Pay Group Table), and Pay Group (which you associate with a company in the Company Table).

Note. Because this page can contain multiple data rows, the system doesn't always warn you that you must complete the **Department** field. However, If you've changed data in another field on the page, the system issues a warning and won't let you leave the field until you select a department code.

Use this field with the Paycheck Print program to indicate the department where the employee's paycheck is to be delivered. Depending on how you defined Paysheet Sequence on the Pay Group Table, the Department field

might also affect the sequence in which paysheets are created.

Department Entry Date When you leave the **Department** field, the system displays the date that the employee was first assigned to this department.

Location The system displays the department location *if* the default location setID that you defined in the Department Table matches the control location setID that is defined for that business unit in the TableSet Control – Record Group Table. You can change the location code.

Note. The location that appears here does not determine the employee's primary work state and location that appear on the paysheets. You specify that information by selecting a tax location code on the Job Data - Payroll page.

Reports To The manager of the department to which you assigned the employee. You can override the default. Link the manager to the department on the Department Table

ID Enter a supervisor ID, if applicable.

If you're using full-position management, don't use this field. If you're using partial-position management, and you defined a value for the **Reports To** field, for the position number that you assigned to this employee, the ID field is unavailable.

Note. Specify the employee's department code before you enter a new supervisor ID. If you enter a supervisor ID before you select a department code, the system overrides the ID each time that you enter or change the employee's department.

Salary Plan If you've associated salary plans with locations, the system enters the salary plan on the Payroll page. A default salary plan appears here only if the default salary setID that is defined on the Department Table matches the control salary setID that is defined for that business unit in the TableSet Record Group Control page.

Establishment ID Identify the employee's establishment. If the employee's department isn't assigned to an establishment, this field is blank.

If the employee's department is not assigned to an establishment, select one of the establishments that is defined for the company.

If the employee's department isn't assigned to a company, enter a company for the employee and assign that employee an establishment ID.

Note. For payroll purposes, for France, an employee must always be assigned to an establishment.

Employee Status Some changes that you make to this field trigger Retro Pay or Final Check processing. A Retro Pay Request is triggered by any employee status change with an effective date that's earlier than or equal to the latest pay end date of a check already paid to the employee. A Final Check Request is triggered by any employee status change that's based on one of the action/reason codes defined on the Final Check Action/Reason Table.

(JPN) Japan

Internal EmplID Enter the employee's internal ID.

Note. You store an internal employee ID to keep track of all employee data changes—such as employment type change—which necessitate a change to a meaningful employee ID. Internal employee IDs also appear on the JPN Job Summary page, and you can search the system by internal employee ID.

Intercompany Transfer

This section enables you to specify intercompany transfer data for Japan.

Intercompany Transfer Flag Specify whether the data that you enter on the page is home or host company information. The system uses this value in conjunction with intercompany transfer-related action or action reason codes to check the validity of your entries. Values are:

- ***Home Company Information:*** Select if another company's employee has joined you in a temporary intercompany transfer.
- ***Host Company Information:*** Select if one of your employees is on temporary intercompany transfer to another company.

Select the blank value at the top of the list to remove all fields, labels, and entries.

Note. Selecting an intercompany transfer flag populates the remaining fields in this group box. If you select ***Home Company Information,*** the **Business Unit, Company, Department,** and **Supervisor Lvl** (home supervisor level) fields are labeled **Home Business Unit, Home Company,** and so on.

Business Unit Select the home or host business unit that prompts from the Company Table component.

Company	Select the home or host company, prompting from the Company Table component for regular company IDs (on the left) and from the IC Transfer Company/Dept page for intercompany IDs (on the right).
Department	Select the home or host department ID, prompting from the Company Table component (on the left) for home departments and the IC Transfer Company/Dept page for host departments (on the right).
Supervisor Lvl (supervisor level)	Select the home or host supervisor level of the job at the home company, prompting from the Company Table component for home supervisor levels (on the left) and from the JPN IC Transfer Supervisor Lvl page for host supervisor levels (on the right).
Int Trn St Dt (intercompany transfer start date)	If you enter host data, enter the start date of this intercompany transfer. Don't enter a date here if the **Action** is ***RET*** (retirement) and the **Reason** is ***PIT*** (permanent intercompany transfer).
Int Trn End Dt	If you enter host data, enter the expected end date of this intercompany transfer. Don't enter a date here if the **Action** is ***RET*** and the **Reason** is ***PIT.*** The end date must be equal to or later than the effective date of the employee's current Job record.

Paying Employees on Disability

Some employees on disability need to be paid at a given percentage of their regular pay. Handle this situation without changing the employee's salary by setting up a disability plan earnings code on the Earnings Table based on a percentage.

Note. This feature works only for hourly employees, not for salaried employees.

When you enter an **Action** of ***STD*** (short-term disability with pay) or ***LTD*** (long-term disability with pay), the system changes the employee's status to ***Leave With Pay.***

To send 100 percent of the employee's pay to the disability plan Earnings Code, go to the Job Data, Job Earnings Distribution page, select the By Percent option, enter the appropriate disability Earnings Code, and enter a Percent of ***100.***

Note. When you put an employee on disability, don't forget to check additional pay records and make any necessary changes.

See Also

(JPN) Assigning Internal Employee IDs

"**(JPN)** Tracking Intercompany Transfers"

"Updating Workforce Information"

"Overview of the Hiring Process," Hiring When You Use Position Management

*PeopleSoft Application Fundamentals for HRMS PeopleBook, "*Processing Transactions Using Regulatory Regions"

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Regulating HRMS System Data"

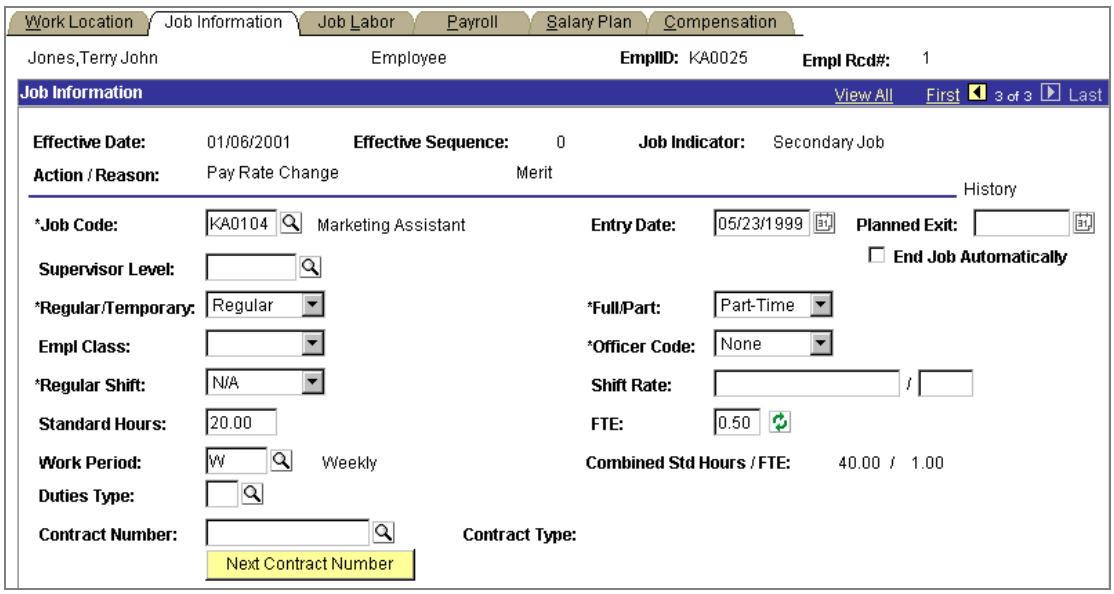
PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working with Companies," Entering Company Information

PeopleSoft Payroll for North America PeopleBook, "Processing Retro Pay"

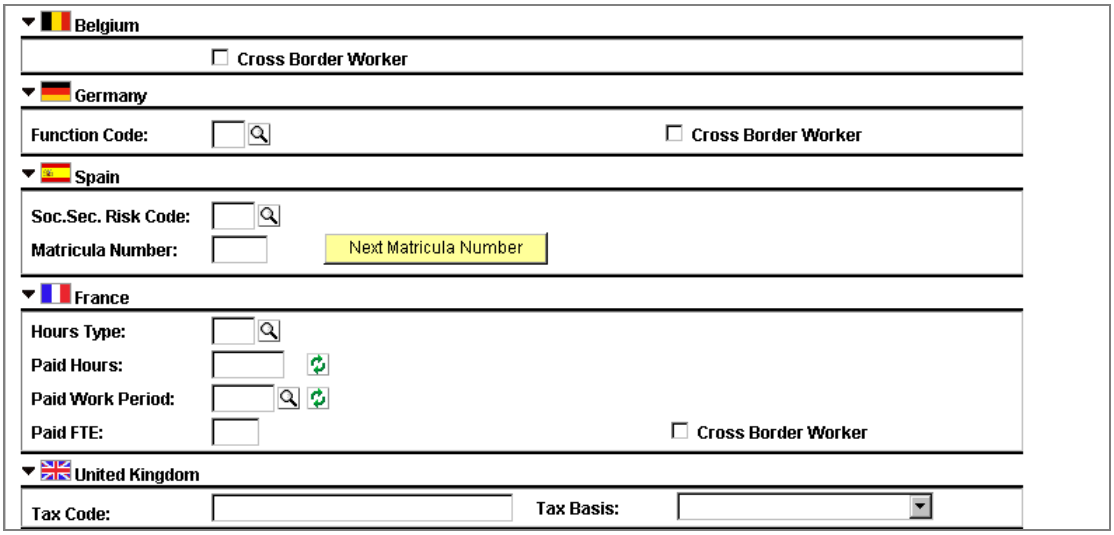
PeopleSoft Payroll for North America PeopleBook, "Defining Earnings and Using Earnings Codes," Defining the Final Check Process

Entering Employee Job Information

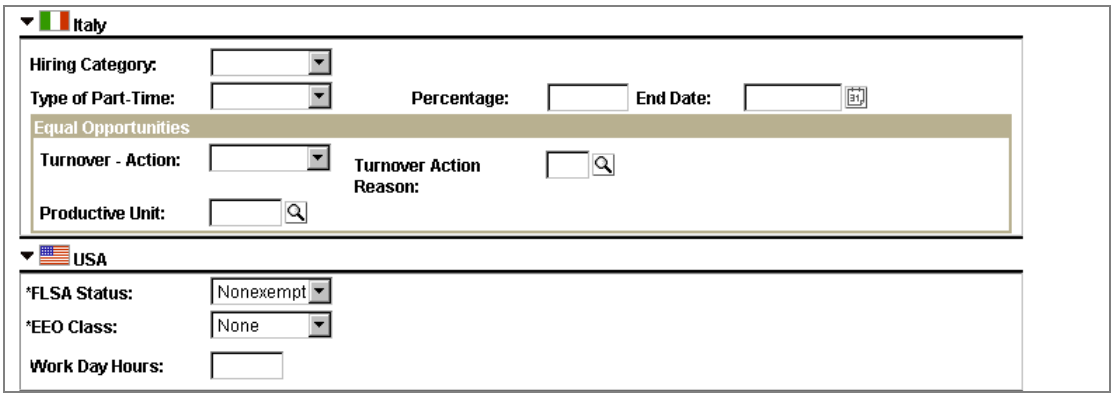
Access the Job Information page.



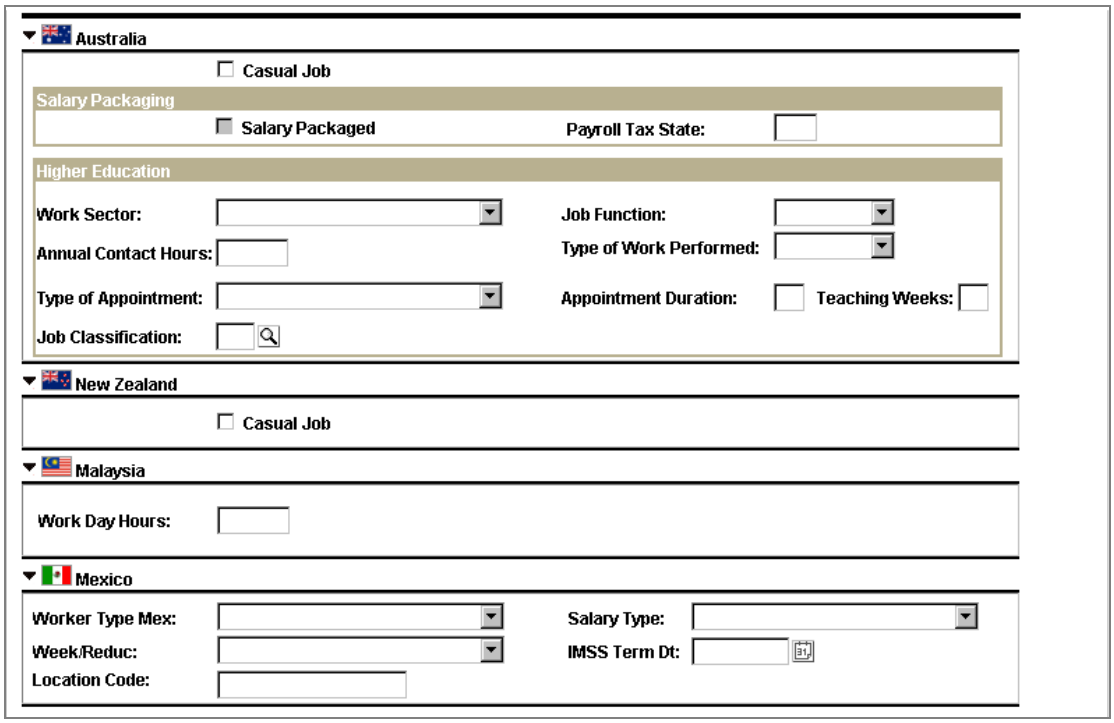
Job Information page (1 of 4)



Job Information page (2 of 4)



Job Information page (3 of 4)



Job Information page (4 of 4)

Note. Many values in this page come from the value that you entered in the Department field in the Job Data - Work Location page. You can override most of these default values.

Job Code

Select a code.

Note. PeopleSoft Payroll for North America uses this field to create a pay line on employee paysheets. The system creates a pay earnings record for each active job code on the employee's employment record.

Entry Date

When you leave the Job Code field, the system displays the date that the employee was first assigned to this job code.

Planned Exit

If this job has an end date, enter the end date for the job. If you don't know the end date initially, you can enter it later.

If this job is a Temporary Assignment, and you do not enter a date here, you can run the Temporary Assignment w/out End Date report to identify those assignments that do not have an end date. This date is necessary if you want the system to terminate this job and reactivate any substantive job that may have been put on hold.

End Job Automatically — Select to end the job on the specified date. This stops all related processing for payroll and benefits for this job. You must run the Reactivate/Termination Update process if your organization uses this feature. You can use this feature only if the Automatic Job Termination check box is selected on the Installation Table - Product Specific page.

Regular/Temporary — Indicate whether the employee is a regular or temporary employee.

Full/Part — Indicate whether the employee is full-time or part-time.

Note. The PeopleSoft Benefits module uses the values that you selected in the **Regular/Temporary** and **Full/Part** fields to determine eligibility requirements.

Note. The PeopleSoft Payroll for North America module uses the full-time or part-time information in conjunction with the holiday schedule. When a holiday falls within a pay period, PeopleSoft Payroll prorates the holiday hours for part-time employees. However, proration is based on the standard hours for the employee, not for the pay group.

Empl Class (employee class) — Provides another method of grouping employees. Examples include ***Assignee, Expatriate,*** and ***Intern.*** Employee classes are included in the Employee Class Table. To override, access this page in correction mode.

Officer Code — Identify highly compensated employees for the Non-Discrimination Testing - 401(k)/401(m) report (NDT004). The default value is ***None.***

Regular Shift — If the employee is working shifts, select the appropriate shift. If the employee doesn't work shifts, leave the **Shift Rate** and **Factor** fields blank. The default value is ***N/A*** (not applicable).

Shift Rate — Set up a modified shift differential for this employee only. To apply a shift differential to a group of employees who work the same shift, enter shift information in the Shift Table in PeopleSoft Payroll for North America. These options are mutually exclusive. You can use only one at a time.

Note. Retro Pay functionality in PeopleSoft Payroll for North America is triggered by any employee **Shift Rate** and **Factor** change with an effective date that's earlier than or equal to the latest pay end date of a check that has already been paid to the employee.

Standard Hours — The system provides several ways to assign standard hours for a new employee. The following table shows the system defaults for this field.

Scenario	*How Employee's Standard Hours Are Assigned*
The job code has a salary plan attached to it and you defined standard hours for the salary plan.	The system completes the default value from the salary plan.
The job code doesn't have a salary plan and grade attached to it.	The system completes the default value from the job code.
You haven't specified standard hours for either the job code or the position.	Define the hours in the Standard Hours field. Enter a value that is greater than 0 that falls between the minimum and maximum standard hours that are defined in the Installation Table.
You leave the Standard Hours field blank, and you *haven't* specified default standard hours for your permission list in the Primary Permission List Preferences Table.	The system completes the default standard hours specified for the employee's company in the Installation tables.
You leave the Standard Hours field blank, and you *have* specified default standard hours for your permission list in the Primary Permission List Preferences Table.	The system completes the default value for your permission list in the Primary Permission List Preferences Table.

Work Period Select a standard work period, the time period during which employees must complete the standard hours.

The system uses the annualization factor of the standard work period in combination with the standard hours to calculate full-time equivalency.

FTE (full-time equivalency) The percentage of full-time work the employee should normally work in this job. The system calculates this value based on the standard hours entry for this job and the standard work period. However, you can override the system-calculated FTE and enter any value. The system issues a warning if you enter a value that is greater than 1.0.

Defining Full Time

If You Have Specified . . .	*Full Time is Defined By . . .*
Standard hours in the Salary Plan Table.	The Salary Plan Table.
Default standard hours in the Installation Table.	The Installation Table.
A location for the employee who has been assigned a salary administration plan on the Location Table.	The Salary Plan Table.

If You Have Specified . . .	*Full Time is Defined By . . .*
A location for the employee with no assigned salary administration plan.	Default standard hours are defined on the Installation Table.
Default standard hours for your Permission List.	Defining Standard Hours and the Standard Work Period. **Note.** This default overrides the other defaults.

Adds to FTE Actual Count? (adds to full time equivalent actual count?) Select to include this employee's job when processing FTE edits for budgeting purposes. Clear to exclude this position when processing FTE edits.

Duties Type For jobs where the Action/Reason is *Temporary Assignment,* you must select the type of duties for the temporary assignment from the Temporary Duties Type Table. You can use this feature only if the Automatic Job Suspension check box is selected on the Installation Table - Product Specific page.

If employees in your organization can hold more than one job, the system displays the following information-only fields with information about all the employee's jobs:

Combined Standard Hours The total standard hours assigned to the employee for all active jobs combined.

Combined FTE (combined full time equivalent). The employee's total FTE status for all active jobs combined. For example, if an employee holds two jobs, one as a professor with an FTE of .5 and one as a physician with an FTE of .35, the employee's combined FTE is .85 (.5 + .35). You can't change or delete this information. The system hides these fields if your organization doesn't allow multiple jobs.

Note. The combined FTE shown here may be different from the total FTE that is calculated for benefits administration eligibility. Combined FTE on this page is the sum of an employee's individual FTEs from *active* jobs only.

Contract Number Select the employee's contract number, if applicable.

(ESP) (FRA) Note. This is a required field when the action is Hire, Rehire, or Transfer for employees who belong to a Spanish or French regulatory region. Prompt on the contract number field to view all active contracts for that employee. If the employee has no active contracts in the system, click the Next Contract Number button and the system assigns a new contract number. When you save, the system warns you that you must update the contract information for the new contract number that was automatically created for this employee. Access the

Contract Data component using the new contract number and make the necessary updates.

Contract Type — The contract type that is associated with the contract number that you selected.

Encumbrance Override — Select to override encumbrance processing at the job level when you hire or add a concurrent job for an employee.

See Also

"Entering Additional Data In Human Resource Records," Setting Up and Tracking Temporary Assignments

(GER) Germany

Function Code — Select the appropriate code for the employee.

(ESP) Spain

Soc. Sec. Risk Code (social security risk code) — The Spanish government requires employers to assign a social security risk code that rates the risk of illness, accident, or death that is connected with each type of job. For example, a coal miner is at higher risk while working than an office manager. You maintain risk codes on the ESP SS Risk Code Table Page.

Matricula Number — The Spanish government requires every employee to have a matricula number. Employers use this number to compile a Matricula book that reports workplace statistics to the government. You maintain matricula numbers on the Location Table.

(FRA) France

Hours Type — Select the appropriate hours type from the list. Different hours type options affect a worker's compensation and standard hours.

This field is for information only. No payroll calculation is based on information in this field.

Hours Type	*Description*
3 * 8	Indicates a shift work pattern. For example, in the manufacturing or industrial sector, production can continue around the clock. The production workers are split into three groups with each group working one after the other, 8 hours a day. Periodically the workers shift to another group. Shift workers who were working the 12 p.m. to 8 a.m. shift move to the 8 a.m. to 4 p.m. shift. Because this type of work schedule implies a lot of constraints to an employee's personal life, these workers are often paid a shift bonus.

Hours Type	*Description*
2 * 8	A shift work pattern that is similar to the 3 * 8 option, except that there are two work shifts instead of three.
STA	Work hours follow a regular pattern using the job's standard hours as indicated on the Job Date - Job Information page.
IND	Work hours follow a regular pattern that is different from the company's default standard hours. Indicate the number of hours in the Standard Hours field on the Job Date - Job Information page.

Paid Hours The number of hours for which the worker is paid. The system enters the value defined for standard hours (defined for the job code for this employee) as the default in this field *only* for employees who are part of a French regulatory region.

Paid Work Period Select the period in which the employee should work. If the regulatory region the employee is assigned to is French, the system inserts the work period defined on the Job Code Table - Job code Profile page as the default value.

A: Annual

B: Biweekly

C: Contract

D: Daily

F: Every four weeks

M: Monthly

Q: Quarterly

S: Semimonthly

W: Weekly

Paid FTE The ratio of the paid hours to the standard hours reference for employees whose regulatory region is French. The system calculates and inserts a value for this field.

(GBR) UK

Tax Code This field appears only if you haven't installed PeopleSoft Payroll for Europe. Enter the controlling code for this employee.

Tax Basis Select the appropriate code. This field is used by PeopleSoft Payroll for Europe; it has payroll implications for UK employees.

(ITA) Italy

INAILCode (Istituto Nazionale per l'Assicurazione contro gli Infurtuni sul Lavoro code)

The system displays the value associated with the job code, which you can override. The employer uses this code to classify jobs according to the level of risk that is associated with the job and the related insurance that is required.

INAIL codes are set up on the Job Function Table page.

Turnover – Action

Select the turnover action (for example ***Layoff*** or ***Termination***) causing the change in employee's job. The value that you enter appears in the Equal Opportunities reports.

Turnover Action Reason

Select the reason for the turnover action. The value that you enter appears in the Equal Opportunities reports.

Productive Unit

Select the employee's productive unit. Productive units are used to group employees based on agreements between unions and employers.

(USA) USA

FLSA Status (fair labor standards act status)

The system completes this field based on the job code that you assigned this employee. FLSA status indicates whether this job is exempt or nonexempt according to the Fair Labor Standards Act. FLSA status also helps determine benefits eligibility in PeopleSoft Benefits Administration.

Note. The Retro Pay functionality in PeopleSoft Payroll is triggered by any FLSA status change with an effective date that's earlier than or equal to the latest pay end date of a check already paid to the employee.

EEO Class (Equal Employment Opportunity class)

The system assigns a regulatory status for this job based on the job code that you assigned the employee.

Work Day Hours

Enter the workday hours.

(AUS) Australia

Casual Job

Select to indicate employment in a casual job.

(AUS) Salary Packaging

Salary Packaged

Select to transfer the employee's salary packaging information into the job data component.

Payroll Tax State

Enter the code for the state in which the employee is paid and for which the organization pays the payroll tax.

(AUS) Higher Education

These fields are required for DETYA reporting and appear only if the Education & Government check box is selected on the Installation Table - Country Specific page.

Annual Contact Hours	Enter the calculated annual contact hours for this employee.
Type of Appointment and **Appointment Duration**	Select the type of appointment. If you select ***Limited,*** enter an appointment duration
Teaching Weeks	Enter the number of teaching weeks for this employee.

See Also

PeopleSoft Human Resources PeopleBook: Track Faculty Events, "(AUS) DETYA Reporting for the Australian Higher Education Sector"

(NZL) New Zealand

Casual Job	Select to indicate employment in a casual job.

(MYS) Malaysia

Work Day Hours	Enter the standard workday hours that are used for payroll and leave calculations.

(MEX) Mexico

It's common in Mexico to have two termination dates: the original termination date and the IMSS termination date.

Your company must notify IMSS of an employee's termination date five days after the employee leaves. However, there are some exceptions to this rule, such as when an employee is on disability and does not come back to the company.

Worker Type Mex	Define the employee's worker type. Values are ***Construction Eventual, Eventual Worker,*** and ***Permanent Worker.*** This field is used for reporting the type of worker to the SUA.
Salary Type	Select the salary type that the employee receives. Values are ***All Salaries, Fixed Salary, Mixed Salary,*** and ***Variable Salary.*** This field is used for reporting to the IMSS.
Week/Reduc (reduced weekly schedule)	Specify the reduced work schedule for the employee. Values are ***1 Day per Week, 2 Days per Week, 3 Days per Week, 4 Days per Week, 5 Days per Week, Complete Week,*** and ***Workday Less than 8 Hours.***
IMSS Term Dt (IMSS termination date)	Enter the IMSS termination date.

Location Code Specify the location code. This field is used to indicate the location of the employee to the SUA.

See Also

PeopleSoft Global Payroll PeopleBook, "Introducing PeopleSoft Global Payroll"

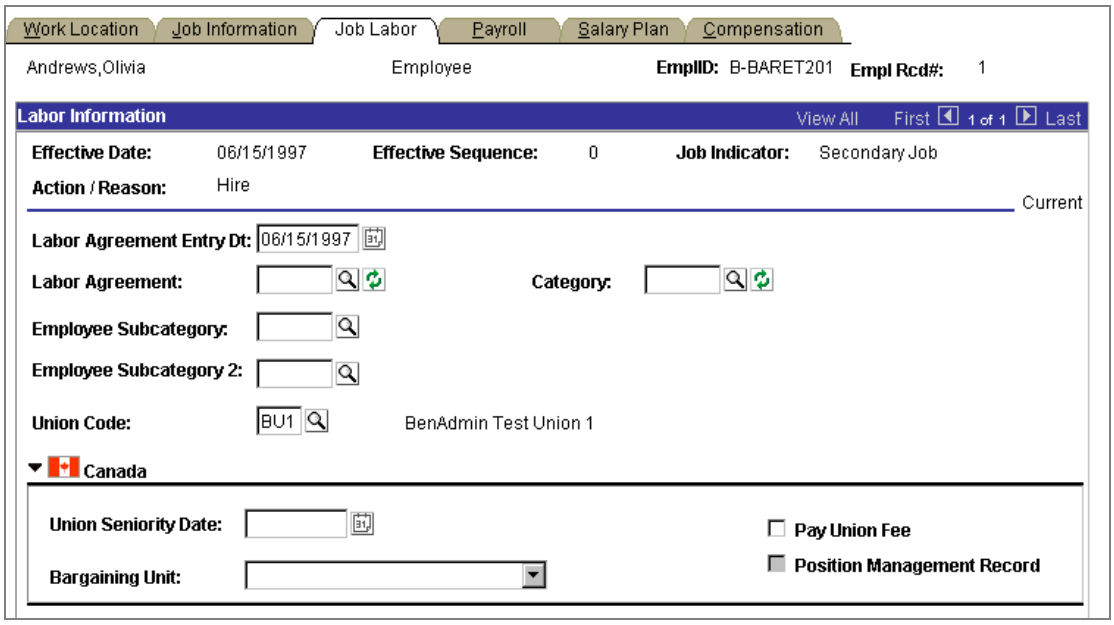
PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up and Using Frequencies," Defining Standard Hours and the Standard Work Period and Defining FTE

PeopleSoft Application Fundamentals for HRMS PeopleBook, Setting Up Jobs," Setting Up Job Function Codes

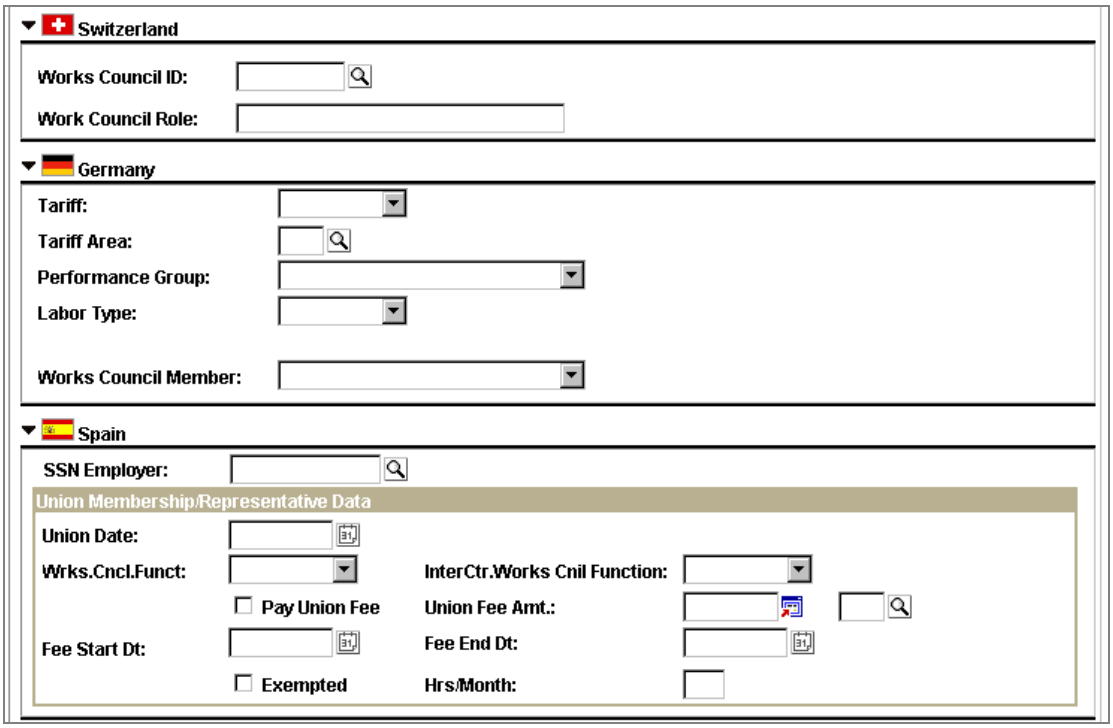
PeopleSoft Human Resources PeopleBook: Base Benefits, "Setting Up Benefit Support Tables"

Entering National Labor Agreement Information

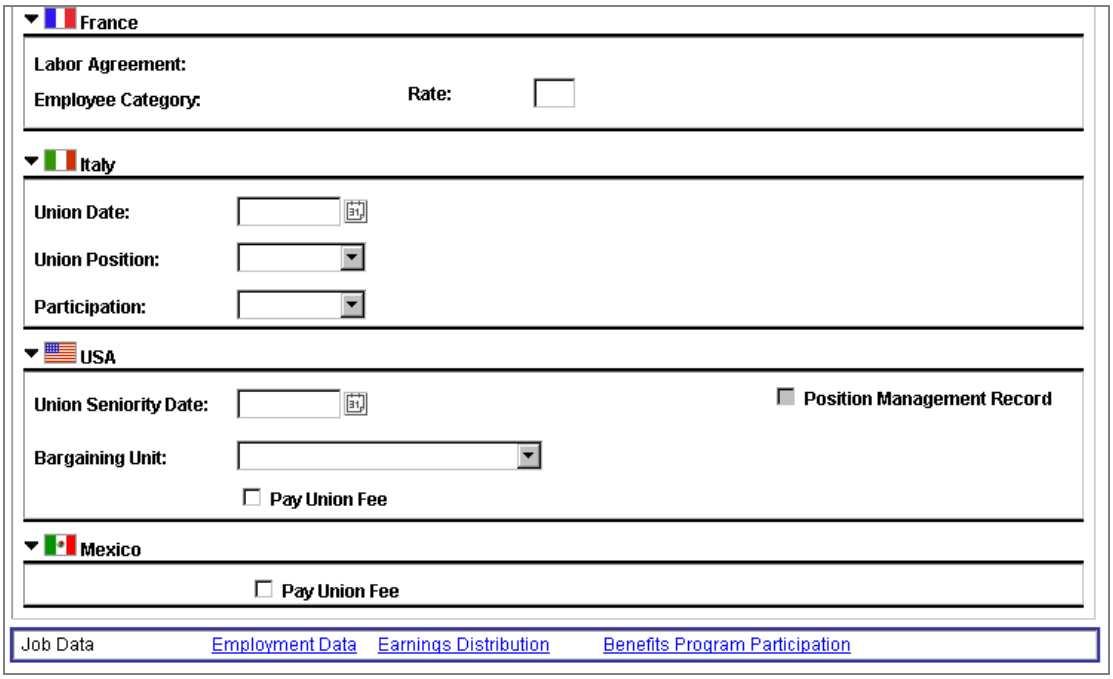
Access the Job Labor page.



Job Labor page (1 of 3)



Job Labor page (2 of 3)



Job Labor page (3 of 3)

Labor Agreement Entry Dt If this employee is part of a national labor agreement, enter the date that the employee entered the category or subcategory. Also use this date to track the employee's seniority within the category.

Labor Agreement	Specify which labor agreement applies to this employee.
Category	Specify which employee category the employee belongs to under the labor agreement.
Employee Subcategory	If the employee category that you selected for this person contains subcategories, this field appears. Select the subcategory that applies to the employee.
Employee Subcategory 2	If the subcategory that you selected for this person contains secondary subcategories, this field appears. Select the subcategory 2 that applies to this employee.
Union Code	If the employee belongs to a union, enter the code.

(CAN) Canada

Union Seniority Date	Enter the date that the employee entered the union.
Pay Union Fee	Select if a union fee should be paid. Your organization can define whether the employee or the employer should pay the fee. This check box doesn't affect system processing.
Bargaining Unit	Enter the unit.
Position Management Record	Automatically selected to indicate that this row was added by the system to reflect user-made changes to the Position Management component.

(CHE) Switzerland

Works Council ID	If you identify an employee as nonmanagement in the Labor Type field, then the works council is responsible for them, and the system displays this field. The works council ID for this employee comes from the value that you entered for the employee's location in the Location Table. You can override this value.

(GER) Germany

Describing a German employee's labor category and role in a company is the third step in the German Works Council business process. Before you complete these fields, you must enter codes and values into the German setup tables and create an association between the works council decision groups and the personnel action.

Tariff	A tariff is a labor contract between the union and the employers' association. The default comes from the employee's location listed in the Location Table. You can override this default.

Tariff Area — Tariff areas are usually associated with geographical regions in Germany. The tariff area comes from the employee's location listed in the Location Table. You can override this default.

Performance Group — Select the employee's performance group.

Labor Type — Specify if a employee is management or nonmanagement. Depending on where this employee belongs, different sets of human resources laws and rules apply. One rule concerns which internal labor committee monitors personnel actions.

Spokesmen Committee ID — If you identify an employee as management in the **Labor Type** field, then the Spokesmen Committee is responsible for the employee, and this field appears. The Spokesmen Committee ID for this employee comes from the employee's location in the Location Table.

Works Council Member — If this employee plays a role on the works council, select the appropriate works council member role. If the employee has no role on the works council, select ***None.***

(ESP) Spain

SSN Employer (social security number for employer) — Enter your company's social security number, as assigned by the Spanish government.

Union Date — Enter the date that the employee joined the union.

WrkCncl Funct (works council function) — If the employee is a member of the works council for your organization, select which role. Values are ***none, Member, President,*** and ***Secretary.***

Pay Union Fee — Select if the employee pays a monthly fee to the union.

Fee Start Dt — Enter the date that the union fee should first be paid.

Exempted — Select if this employee is exempt from a certain amount of work duty to handle works council duties.

InterCtr.Works Cnil Function (intercenter works council function) — Select the role that the employee has in the union group (*comite intercentros*). Values are ***Member 1, Member 2,*** and ***Member 3.***

Union Fee Amount — If the employee pays a union fee, enter the amount.

Fee End Date — Enter the date that the union fee should no longer be paid.

Hrs/Month (hours each month) — This field appears if you selected the **Exempted** check box. Enter the number of hours each month that the employee is exempted from regular work to handle works council business.

(FRA) France

Rate Enter the minimum salary calculation rate for this category. The rate is a 3-digit number that is used in certain collective agreements to calculate the minimum salary for the subcategories (number, grade, and step). A subcategory can be associated with several possible rates, but only one rate is associated with the employee.

(ITA) Italy

Use this section to enter the union membership details of employees who belong to a union. Track the union code and, where applicable, the employee's part- or full-time position in the union.

Union Code Select the employee's union code.

Union Date Indicate the date that the employee joined the union.

Union Position Select the position that the employee holds in the union, if applicable.

Participation Indicate the employee's level of participation in the union.

(USA) USA

Union Seniority Date Enter the date that the employee entered the union.

Pay Union Fee Select if a union fee should be paid. Your organization can define whether the employee or the employer should pay the fee. This check box doesn't affect system processing.

Bargaining Unit Enter the employee's bargaining unit.

Position Management Record The system selects this check box whenever the system has inserted this data by updating the incumbent to reflect changes on the Position Data page.

(MEX) Mexico

Pay Union Fee Select if the employee pays a union fee.

(CAN) (US) Reviewing Union Membership in Canada and the U.S.

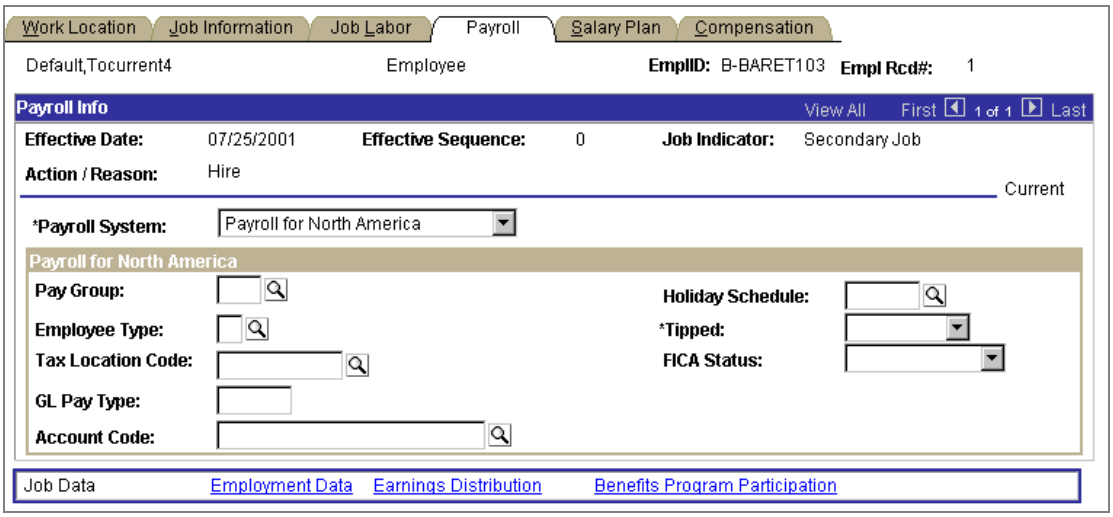
If you're managing a workforce in Canada or the United States, you might want to review information about each union organization that your employees belong to and see a list of employees who are members. Use the Union Membership report (PER009) for this purpose. That report displays the employee ID, name, date hired, seniority date, department, location, job title, and shift.

See Also

PeopleSoft Human Resources PeopleBook: Manage Positions, "Managing Position Data"

Entering Employee Payroll Processing Data

Access the Payroll page.



Payroll page

Payroll System Select the payroll system that is used to process this employee's paycheck.

(AUS) Australia

Balance Group No (balance group number) Balance group numbers identify which Global Payroll accumulator the system should store tax balances in. Tax accumulators are keyed by employee ID, employee record number, pay entity, and balance group number. You use balance group numbers to combine or separate tax balances for multiple jobs (where different tax rates apply) or to separate balances in the case of termination and rehire. There is a balance group ID for each payment summary that is required at the end of the year. There must be an employee tax data record for each balance group ID that the employee has.

(HKG) Hong Kong

Balance Group No When employees are terminated and subsequently rehired in the same or similar position in the same tax year (using the Job Data component in Administer Workforce), there is a legislative reporting requirement in Hong Kong to keep the periods of employment and earnings balances separate. PeopleSoft Global Payroll uses the balance group number to ensure that the relevant periods of employment and balances of an employee in a tax year are stored separately in terms of payroll data. This enables an employee to have multiple tax balances if the employee is

terminated and rehired in the same financial year.

When an employee is rehired in the same tax year, the values in this field are auto incremented and the balance amount is stored in the system variable CM VR BAL GRP ID (attached to each YTD accumulator).

Every time you run the payroll process, the balance that is stored in the system variable CM VR BAL GRP ID is retrieved by the accumulator to resolve the earnings that are generated for each new position.

Balance group numbers are used to maintain earnings balances and are used as User Key 2 for all Hong Kong Year to Date accumulators.

Note. Before entering information for U.S. foreign nationals, use the Substantial Presence Test following this navigation: **Administer Workforce, Administer Workforce (GBL), Use Lcl, USA Presence Test, Substantial Presence Test.**

See Also

"Managing Country-Specific Workforce Data," (USA) Determining Foreign Nationals US Residency Status

Payroll for North America

If you are using PeopleSoft Payroll for North America or Payroll Interface to process this employee's paycheck, complete these fields:

Pay Group Select a pay group.

Employee Type The value depends on the pay group. The system completes the field with the default value from the Pay Group Table. If an employee type doesn't exist for this pay group, establish one in the Pay Group Table.

Tipped Indicate whether this employee will receive tips

Tax Location Code Select a tax location code.

Warning! Do not change an employee's **Tax Location Code** more than once for the same effective date (using effective sequence). The system creates tax records according to the first tax location change only. Tax records for the second tax location change on the same date are not created; instead, the system issues an error message.

FICA Status Indicate whether the employee status is ***exempt***, ***subject***, or ***Medicare only***.

GL Pay Type (general ledger pay type) — (Optional) Indicate the general ledger account to which to post this employee's salaries and wages. You can use this field as a way to charge an employee's pay to a particular cost center.

Account Code — (Optional) Select the appropriate labor distribution to which to post the hours and earnings for this employee. You define labor distribution accounts in the Account Code Table.

Holiday Schedule — If you defined a holiday schedule in the Pay Group Table, the system displays it here.

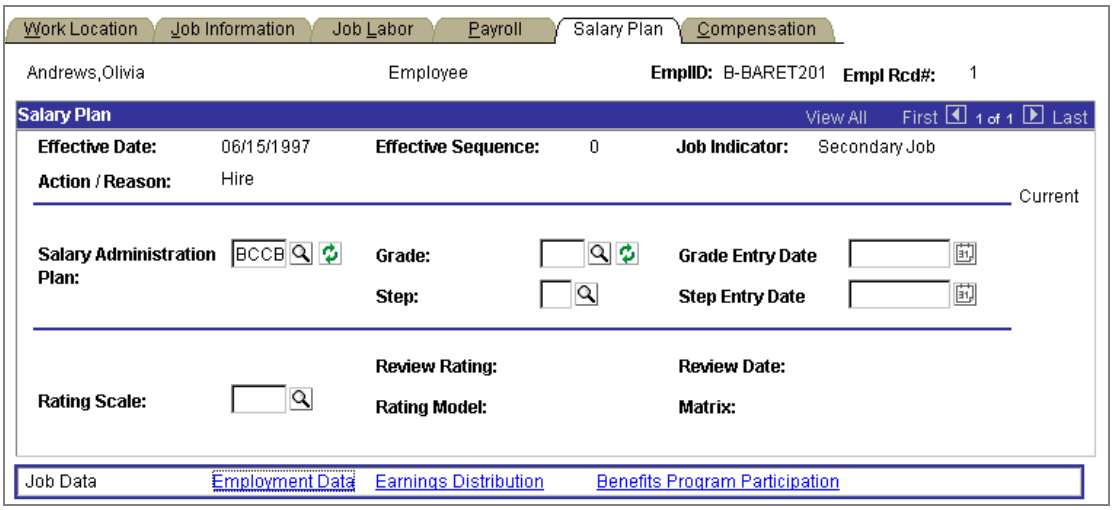
See Also

PeopleSoft Payroll for North America PeopleBook, Introducing PeopleSoft Payroll for North America

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Multiple Components of Pay"

Entering Employee Salary Plans

Access the Salary Plan page.



Salary Plan page

Salary Administration Plan — If you've associated salary administration plans with locations, the value in this field comes from the Location Table based on setID matching. Otherwise, the salary plan comes from the Job Code Table.

To use Auto Calculated Premium processing for this employee, select a plan that has Auto Calculated Premium selected and an Absorbing and/or Non-Absorbing

	Premium Rate Code assigned on the Salary Plan Table. The system displays Auto Calculated Premium-related fields on the Compensation page only if you select an Auto Calculated Premium plan here.
Grade	If you've associated a grade with the employee's job code, the system displays the default value from the Job Code Table.
Grade Entry Date	The date that the employee first joined this grade. You can override this value.
Step	If you've associated a step with the employee's job code, the system displays the default value from the Job Code Table.
Step Entry Date	The date that the employee first joined this step. You can override this value. **Note.** The system verifies the combinations of salary administration plans and grades that you've selected.
Review Rating	If a review has been performed for the employee, the employee's review rating results that are current as of the effective date of the job information are displayed (if the review was conducted using an average-type review rating scale).
Review Date	If a review has been performed for the employee, the employee's review date is displayed. If you run the Review Results to Job process to enter the results of a review conducted with a summation-type rating scale, the system enters this date.
Rating Scale	The rating scale you associated with the salary grade in the Salary Grade Table.
Rating Model	The rating model that is associated with the rating scale.
Matrix	The salary increase matrix that is associated with the employee's salary grade. This field is visible only if the rating scale is average type.
Total Review Points	The total review points of a summation-type review scale when you run the Review Results to Job process.
Final Review Band	The final review band that results from an employee review with a review band rating scale type.

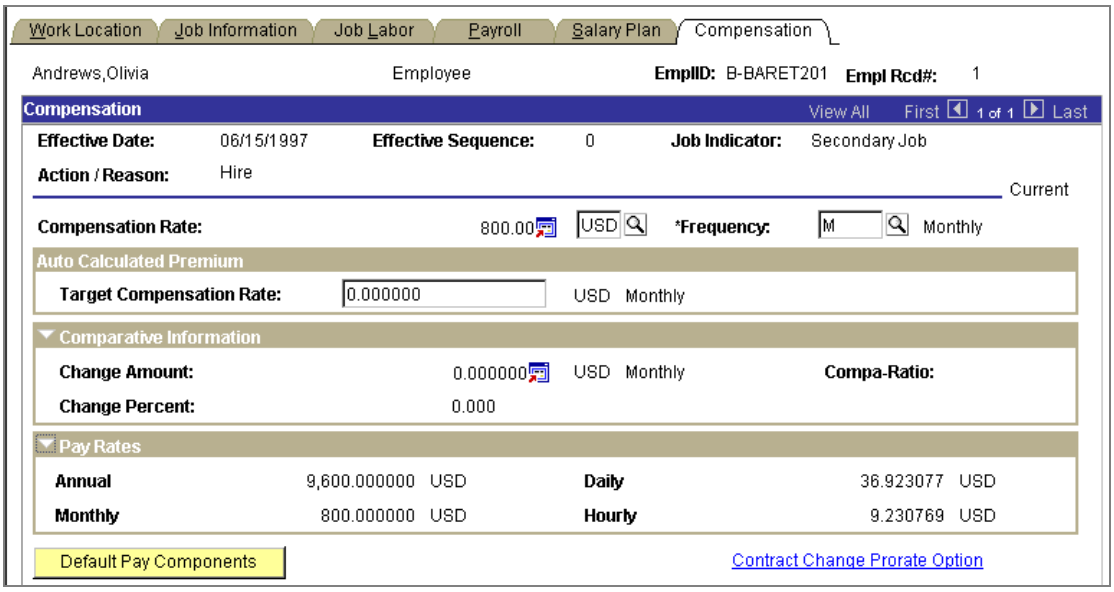
See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Regulating HRMS System Data"

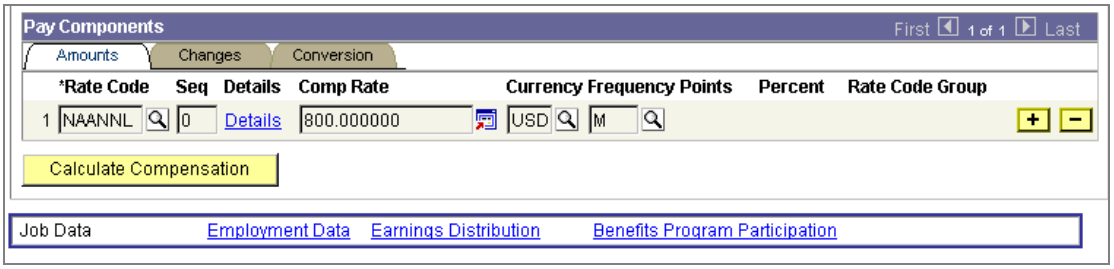
PeopleSoft Human Resources PeopleBook: Plan Salaries, "Reviewing Employee Performance"

Entering Worker Compensation Information

Access the Compensation page.



Compensation page (1 of 2)



Compensation page (2 of 2)

Compensation Rate The compensation rate for the employee, which is the sum of all base pay salary components.

The PeopleSoft Payroll Payroll Calculation process uses this value on the Job Data page, not the individual Base Pay components in the Pay Components section. The only compensation rates that the system uses from the Pay Components section are the non-base pay rates.

Frequency Select a compensation frequency.

Select ***Contract*** for contract employees. The system uses the information that you've set up on the Contract Pay page to manage the employee's compensation.

Note. The Retro Pay functionality in PeopleSoft Payroll for North America is triggered by any frequency or compensation rate change with an effective date that's

earlier than or equal to the latest pay end date of a check already paid to the employee.

AutoCalculated Premium

Target Compensation Rate

Enter the compensation rate for the employee if the employee is being compensated at a rate that exceeds the default salary.

Absorbing: Premium decreases when the compensation rate increases over time in order to maintain the target comprate.

Non-Absorbing: Premium does not change even when the compensation rate increases over time.

The system calculates the difference between this amount and the original job comprate and enters the difference in the premium components (the absorbing and/or non-absorbing premium rate codes of the salary plan) of the employee's compensation package. The system then recalculates the comprate with the premium component comprate.

If both an absorbing rate code and a non-absorbing rate code are associated with the salary plan, the absorbing rate code initially receives the full, calculated amount of the difference between the target comprate and the originally calculated job comprate.

You can then enter some portion of the total calculated premium in the non-absorbing rate code (in which case the absorbing rate code amount automatically decreases by the same amount so that the target comprate remains the same) or delete the non-absorbing rate code. The system recalculates the job comprate, including the premium component comprate.

You cannot enter a target comprate that is less than the original job comprate without the premium components.

This field is available only if the employee's salary plan (on the Salary Plan page) has Auto Calculated Premium enabled.

Don't Absorb Change

Select to instruct the system to leave absorbable rate codes unchanged if there is a change in the default salary amount.

This option only applies to employees who have a target comprate and are assigned to a salary plan with the auto calculated premium function enabled and an absorbing premium defined.

Comparative Information

Change Amount The change in the amount of compensation for the rate code.

Change Percent The percent of change in the compensation for the rate code.

Compa-Ratio (comparison ratio) The percent-through-range calculation, based on the salary plan and grade and the currency that your organization uses.

Job Ratio The percent-through-range calculation, based on the midpoint salary of the employee's job code.

The job ratio is available only if the employee's job code has job ratio information (midpoint salary, currency, and frequency) defined.

Pay Rates

This group box contains pay rates that are calculated using the pay frequencies from the corresponding pay group. Pay group examples are from either PeopleSoft Payroll for North America or Global Payroll. These pay rates can be different from the Job Comp Rate because different frequencies might be used for annualization and deannualization.

Default Pay Components Click this button to:

- Execute rate code defaults (excluding seniority pay) based on the current values of the designated job fields.
- Replace manual updates and old default values with the current default values.
- Recalculate the compensation package of affected employees, including the comprate, currency, frequency, apply FTE, percent (including current rate code groups), salary points, automatically calculated premium, and so on.

Recalculate compensation-related fields, such as annual amounts or compa-ratio, on the Job Data record.

If you don't click the Default Components button after updating relevant Job Data fields, the system issues a warning when you attempt to save the new record. If you click OK, the system displays this page, where you can click this button and make any required changes. If you do not click this button, the component package doesn't default until the next time the default component logic is triggered (either when you click the button or through a batch update process).

Contract Change Proration Option	Click this link to make changes to the employee's contract proration options. Select one of the following options to prorate the earnings change over the remainder of the contract: ***No Proration of Change Amt.*** (no proration of change amount): Select if you do not want the system to prorate the change to the employee's compensation across the contract. ***Prorate Over Contract Period:*** Select to have the system prorate the compensation change over the contract period (determined by the contract start and end dates). ***Prorate over Payment Period:*** Select to have the system prorate the compensation change over the payment period (determined by the payment start and end dates).
Lump Sum Retro Payment (lump sum retroactive payment)	Select to enable the system to process a lump sum payment of retroactive earnings to the employee.
Calculate Compensation	Click to have the system recalculate the employee's compensation without executing any rate code defaults or replacing any default values. You cannot modify the employee's pay components without recalculating the compensation.

See Also

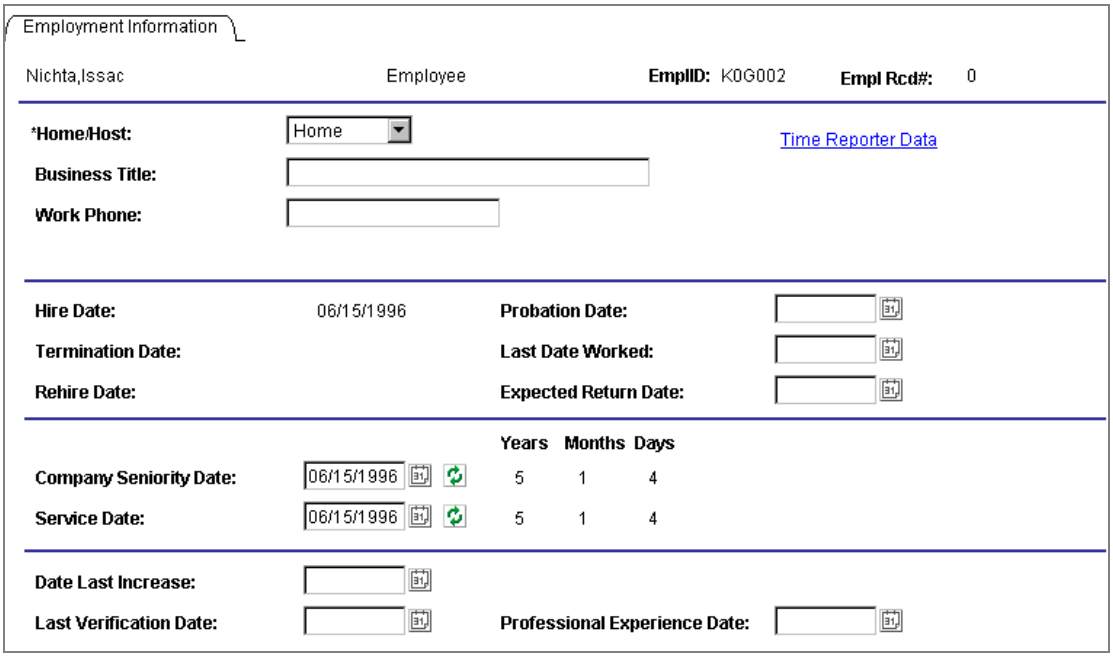
PeopleSoft Payroll for North America PeopleBook, "Preparing Your Payroll Process," Administering Contract Pay

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Multiple Components of Pay"

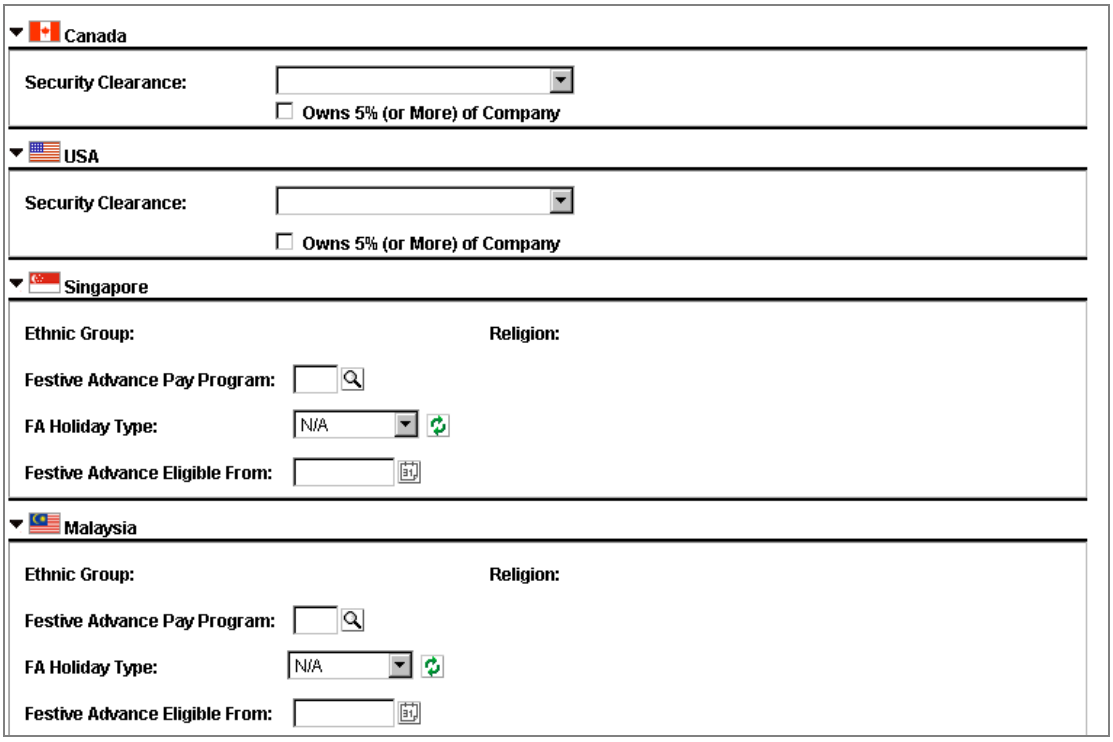
PeopleSoft Human Resources PeopleBook: Base Benefits, "Introduction to PeopleSoft Base Benefits"

Entering Optional Employment-Related Data

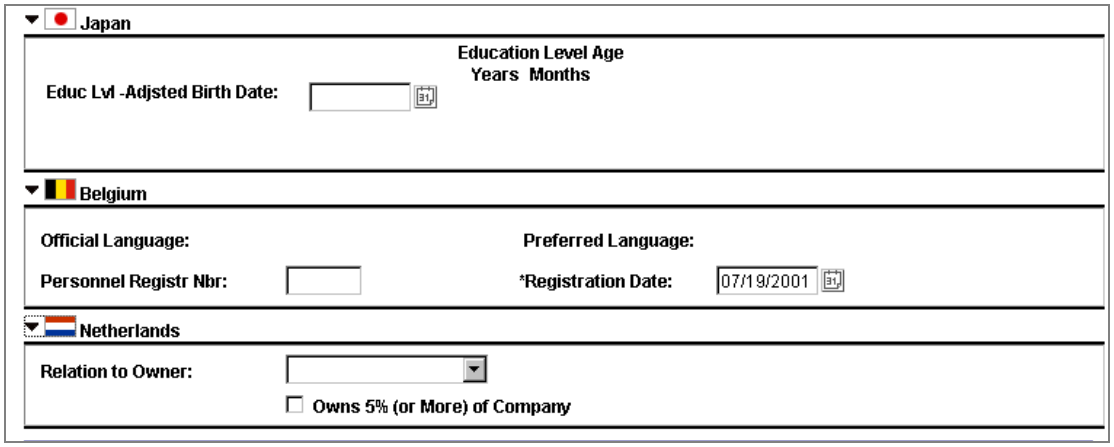
Access the Employment Information page.



Employment Information page (1 of 3)



Employment Information page (2 of 3)



Employment Information page (3 of 3)

This information isn't effective-dated, so the data you enter and review here tells you about the employee's current employment information.

This means that if you rehire an employee and enter a future effective date, the system clears the **Termination Date** and **Date Last Worked** fields, and you don't see the current information. To review information in other data rows, use the Job Data component.

After you save the Hire component, the system sets the **Company Seniority Date** and **Service Date** fields on this page to the effective date that you enter on the Work Location page. You can override these fields after saving the component. The system calculates and displays the employee's service months/days based on the information that you enter in the **Service Date** field.

Home/Host — For employees on assignments, this field specifies whether the current job is at the employee's home location or the assignment location. For a new hire, select ***Home.***

Business Title — Enter the employee's official title, which might be different from the job title. If you're driving part or all of the system by position, the system enters the default title for the position number that you assigned to the employee on the Work Location page.

Work Phone — Track the employee's primary work phone number. You can also update this field using the Manage Positions pages.

If you're driving part or all of the system by position, the system enters the default phone number for the position number you assigned to the employee on the Work Location page.

Time Reporter Data — Click this link to review the PeopleSoft Time and Labor data for this employee. If you aren't using PeopleSoft Time and Labor, this link is unavailable.

Hire Date	The system displays this date after you complete and save the Hire component. This date is the same as the effective date in the Job Data component.
Probation Date	Enter the date that the employee was placed on probation.
Termination Date	The employee's termination date, if applicable.
Last Date Worked	If at a later date you change the status of an employee's employment, depending on the administrative action you select in the Job Data component, the system displays the rehire date, termination date, or date last worked. Also, depending on the administrative action you take, you can enter the expected return date and probation date. The system displays the day before the termination effective date as the termination date and the date last worked. If you rehire the employee, the system resets these fields to blank. When an employee returns from leave, the system resets only the **Date Last Worked** field to blank.
Company Seniority Date	Based on the date that you enter here, the system calculates the number of years, months, and days of seniority for an employee.
Service Date	Based on the date you enter here, the system calculates the total years, months, and days of service for an employee, including any credit for military leave or the total amount of time that the employee has worked for multiple companies in your organization.
Date Last Increase	When you change an employee's compensation rate, change amount, or change percent data on the Job Data - Compensation page, the system populates this field with the effective date of this change.
Last Verification Date	The latest date when the employee verified his or her personal data in the system.
Professional Experience Date	The earliest date that the employee started working in a job that required skills that are directly related to the employee's current position.

Hire and Rehire Dates

The following table shows what the system displays (in DD/MM/YY format) in the various date fields on the Employment Dates page, depending on whether you use Hire or Rehire when you create a new job record for the same Empl Rec# (employee record ID). The important point here is that Hire overwrites the original Hire Date, but Rehire does not.

Example

1. Hired January 10, 2000.

2. Retired January 1, 2001.

3. Hired (3a) or Rehired (3b) January 11, 2001.

Event No.	*Hire Date*	*Term Date*	*LDW*	*Rehire Date*	*CSD*	*SD*
1. Hired	01/10/00	N/A	N/A	N/A	01/10/00	10/01/00
2. Retired	01/10/00	12/31/00	12/31/00	N/A	01/10/00	10/01/00
3a. Hired	01/11/01	Cleared	Cleared	N/A	01/10/00	10/01/00
3b. Rehired	01/10/00	Cleared	Cleared	01/11/01	01/10/00	10/01/00

Legend: Term = Termination, LDW = Last Day Worked,
CSD = Company Seniority Date, SD = Service Date.

(CAN) Statistics Canada Academic Teaching Employment Table

The fields in this table are used in the Canada Academic Teaching Surveys Business Process, a regulatory requirement for Canadian higher-education, degree-granting institutions. Complete this table for all faculty staff if you are required to submit Academic Teaching Surveys to Statistics Canada. We recommend that you review the information in this table to ensure that it is up to date every time you change an employee's record.

Teaching Change Date

The system adds a new teaching change date row only if you choose to add one.

Insert a new row for each teaching appointment if your institution uses the same employee record number to record successive appointments. For the Part-Time Academic Teaching Survey, the system reports the Academic Teaching Employment record that is effective on the end date of the appointment or at the end of the period that is being reported.

Survey Report Flag

The Report Flag field value, as specified on the Job Code Table - Job Code Profile Page. If the value is ***N/A,*** this employee record isn't reported in academic teaching surveys. You can override this default value.

Duties

The duties value, as specified on the Job Code Table - Job Code Profile Page. You can override this default.

Principal Subject

Select the principal subject that is taught by the employee.

Teaching Load

Enter the employee's teaching load during the academic teaching employment. For example, if the employee is teaching three full courses, enter ***3.0.*** If the employee is teaching one full course and one-third of another, enter ***1.33.***

FTTE (full-time teaching equivalency)

Enter the ratio of the teaching load to the full-time teaching equivalency. For example, if teaching four courses constitutes full time and the employee is teaching three courses, enter ***.75.***

Collapse as FT (collapse as full time)

Select if the employment can be collapsed into the reportable full-time job for the purpose of consolidating salary amounts from jobs that make up a full-time job.

Use this field only:

- If the employee has two or more part-time jobs in different departments that function as a single full-time job.
- If the employee receives an administrative stipend under another employee record number that doesn't accrue benefits but counts toward the employee's full-time salary.

Don't collapse reportable part-time jobs into a reportable full-time job (the system won't report on the part-time job). Instead, if you use this field, set up a separate employee record for part-time jobs.

(SNG) Singapore and (MYS) Malaysia

After you have set up festive advance calculation rules and the pay programs, and associated job codes with pay programs, the eligible employees in your workforce are granted festive advances. Assigning the festive advance type to the employee occurs during the hire process after you assign the ethnic group, religion, and job code. However, before you accept those defaults, you might still have some issues to resolve. If you decide that any of the employee's festive advance details should be different, change them on this page.

Ethnic Group and **Religion**

The values that appear here are the values that you entered on the Personal Data - Identity/Diversity page.

Festive Advance Pay Program

The default value is from the Job Code Table - Job Code Profile page. You can change this default.

FA Holiday Type (festive advance holiday type)

Select a **Festive Advance Type** from the list. Values are ***Chinese New Year, Christmas, Deepavali, Hari Raya,*** and ***N/A.***

The default value is the festive holiday that is appropriate to the ethnicity or religion that you entered for this employee on the Personal Data - Identity/Diversity page. You can change this selection. If an employee chooses not to receive a festive advance, select ***N/A.***

Festive Advance Eligible From

If your firm has a probation period that must be served before an employee is entitled to a festive advance, the probation period must be monitored.

When you set the probation period in your Festive Advance Pay Program, you set the number of days or months. The system adds this information to the employee's Hire Date to determine the **Festive Advance Eligible From** date; this date appears as the default on the FA Employee Details page.

When you process the festive advances, the system checks the **Festive Advance Eligible From** date against the date on which to pay the advance. If the **Festive Advance Eligible From** date has not yet passed, the employee is not paid a festive advance.

Note. This date is used by the festive advance calculation process and the festive advance calculation rule to determine if the employee has served enough time to be eligible for a festive advance. The date is derived from the job commencement date and the probation period in the Festive Advance Pay Program.

See Also

Personal Data - Identity/Diversity page.

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Jobs," Defining Job Function Codes

PeopleSoft Human Resources PeopleBook: Manage Festive Advances, "(SGP) (MYS) Managing Festive Advances," (SGP/MYS) Changing Default Festive Advance Holiday Options and (SGP/MYS) Viewing and Modifying Festive Advances

(JPN) Japan

Educ Lvl-Adjsted Birth Date (education level-adjusted birth date)

Select the employee's education level adjusted birth date. The day and the month are your organization's standard calculation birth date (SCB—usually April 1); the year comes from the employee's education level-adjusted birth date (ELABi). Although the system calculates this date, you can overwrite it (for example, to give an employee credit for special work experience).

Education Level Age Years Months

Displays the employee's highest education level as specified on the Personal Data component. This education level is the starting point for education level age-related calculations.

(BEL) Belgium

The system displays the official language, based on the company official language, unless the company is located in Brussels-Capital Region, in which case the preferred language is the default.

Personnel Registr Nbr (personnel registration number) — Enter the number under which the employee is registered in the personnel register.

(NLD) Netherlands

Relation to Owner — Select the employee's relationship to the owner, as appropriate.

See Also

PeopleSoft Human Resources PeopleBook: Base Benefits, "Setting Up Benefit Support Tables

PeopleSoft Human Resources PeopleBook: Track Global Assignments, "Setting Up Basic Assignment Information

PeopleSoft Human Resources PeopleBook: Manage Positions, "Setting Up Positions"

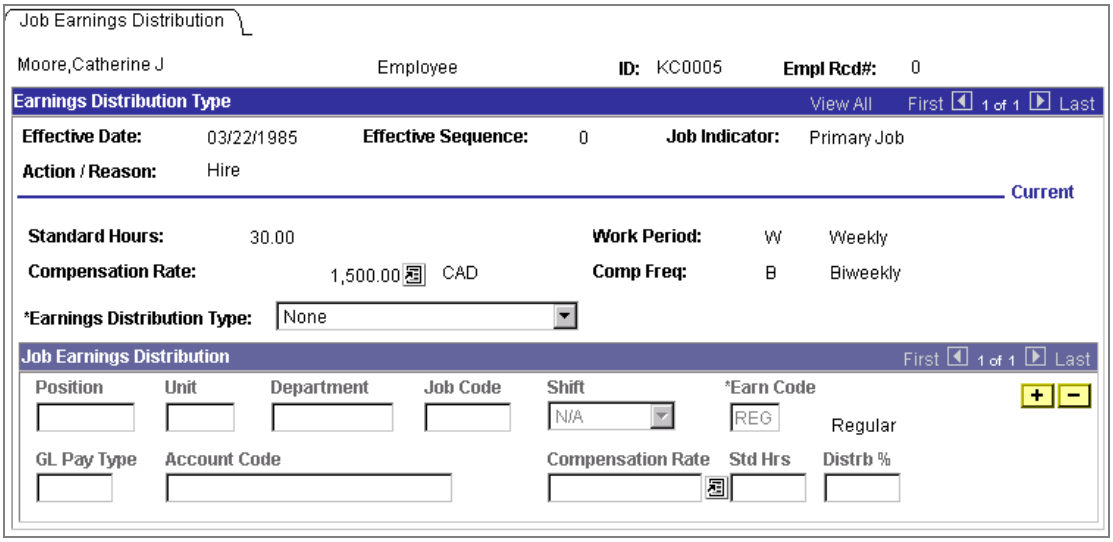
PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Multiple Jobs"

PeopleSoft Application Fundamentals PeopleBook, "Setting Up Local Country Functionality," Setting Up Education Level Ages

PeopleSoft Time and Labor PeopleBook, "Setting Up Basic Tables"

Distributing Job Earnings

Access the Job Earnings Distributions page.



Job Earnings Distribution page

About This Page

- Skip this page if you don't need to distribute standard earnings for the employee. PeopleSoft Payroll for North America uses the department, job code, account, shift, position number, and general ledger type that you entered on the Work Information and Payroll pages to calculate pay earnings records.
- The system hides this page when *all* job rows in the component use PeopleSoft Global Payroll. However, if any job row has another payroll system (for example, PeopleSoft Payroll for North America or Payroll Interface), then the system displays the page.
- *Don't* use this page to distribute special earnings, such as holiday pay or bonuses; instead, use the processes in PeopleSoft Payroll for North America for handling special earnings.
- If you enter a parameter such as **Department** on this page, the parameter overrides the same field on the Job record. If you leave a parameter blank, the system uses the field from the Job record.

Earnings Distribution Type Select from the following:

None: You're not allocating earnings for this employee. The system calculates and charges employee compensation according to the information listed in the Job Data component. If you select this option, leave the other Job Earnings Distribution fields blank.

By Amount: Available only for salaried employees. The system totals the amounts in the distribution lines and checks the total against the total in the **Compensation Rate** field on the Job Data - Compensation page. The total earnings distribution amount must equ*al* the compensation rate amount.

Enables you to apportion the employee's total earnings for a period on the basis of an amount. The system totals the amounts in the distribution lines and inserts the total in the **Compensation Rate** field on the employee's job record.

For example, to charge 3,000 of an employee's regular earnings to the employee's regular department (on the Job record), 544 to department 105, and 1,000 to department 10503, you set up three distribution lines:

- On the first line, leave Department blank (so that the system uses the employee's regular department from the job record) and enter *3000* in the Amount field.
- On the second line, enter *105* in the Department field and *544* in the Amount field.
- On the third line, enter *10503* in the Department field and 1000 in the Amount field.

The amounts in the distribution lines total 4,544, so the system inserts that amount in the **Compensation Rate** field on the employee's job record.

By Hours: Available only for hourly or exception hourly employees. The system totals the hours in the distribution lines and updates the total in the **Standard Hours** field on the Job Data - Job Information page. The **Standard Hours** field value that appears at the top of this page also changes.

Enables you to apportion the employee's total earnings for a week on an hourly basis. The system totals the hours in all distribution lines and inserts the total in the **Standard Hours** field on the employee's job record.

For example, if an employee works a 40-hour week, and you want to charge 30 hours of regular pay to the employee's regular department (on the job record) and 10 hours to department 103, you set up two distribution lines.

- On the first line, leave Department blank (so that the system uses the employee's regular department (from the job record) and enter 30 in the **Standard Hours** field.
- On the second line, enter 103 in the Department field and 10 in the Standard Hours field. The hours in the distribution lines total 40, so the system inserts 40 in the **Standard Hours** field on the employee's job record.

By Percent: Available to all employees. The sum of the percentages in the distribution lines must equal 100.

Enables you to apportion the employee's total earnings for a period on a percentage basis.

For example, to charge 80 percent of regular earnings to the employee's regular department (on the employee's job record) and 20 percent to department 100, set up two distribution lines:

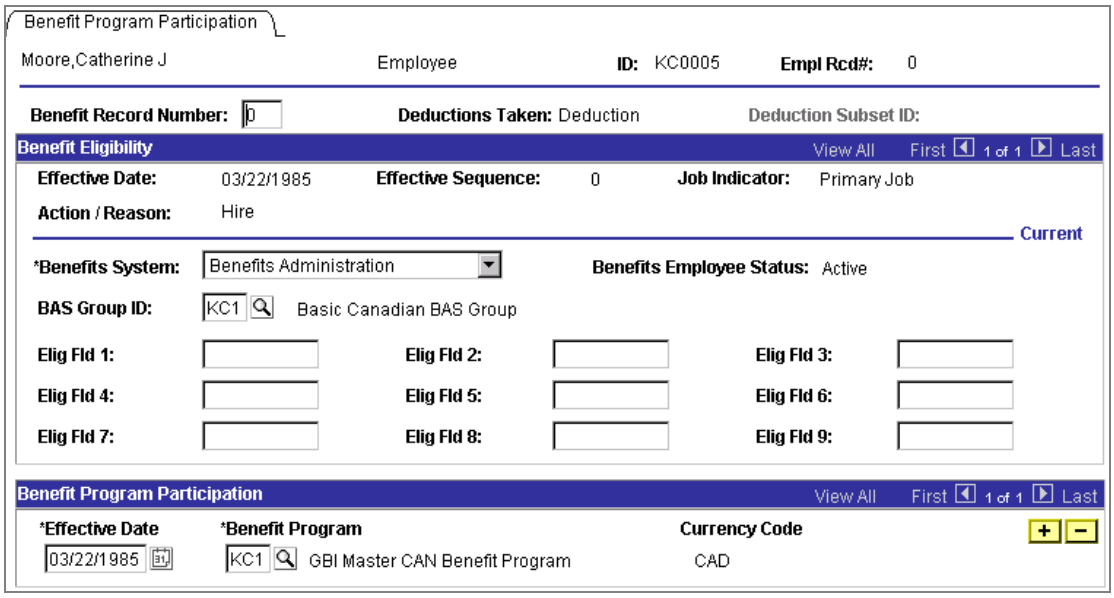
- On the first line, leave Department blank (so that the system uses the employee's department from the job record) and enter 80 in the Percent field.
- On the second line, enter 100 in the **Department** field and 20 in the Percent field.

See Also

PeopleSoft Payroll for North America PeopleBook, "Defining Earnings and Using Earnings Codes"

Specifying Benefit Enrollment

Access the Benefit Program Participation page.



Benefits Program Participation page

Benefit Record Number An identifier that links two or more jobs together for benefits purposes. The system sets the value to ***0.*** You can override this value to attach this job to a different benefit record number. The system clears the Benefits Program data and repopulates it with values that are attached to the benefit record number that you enter. You can't change this field unless you have enabled the Multiple Jobs option on the PeopleTools Options page.

Benefit Program The benefits program for the employee's pay group, which you specified in the Pay Group Table. You can override this value.

Currency Code The currency that is specified for the benefit program in the Benefit Program Table.

Elig Field 1-9 (eligibility configuration fields 1–9) Enter values to further filter employees' eligibility for a specific benefit. These are client-definable fields.

See Also

PeopleSoft Human Resources PeopleBook: Base Benefits, "Setting Up Benefit Support Tables"

Adding Nonemployees

The Hire component is the most common component that you use to hire employees, but it's not the only component. You can also use the Add Non-Employee component in the Administer Workforce (GBL) and Administer Workforce (USF) modules.

In this section, we describe the Add Nonemployee process and discuss how to set up nonemployee security.

See Also

Overview of the Hiring Process

The Add Nonemployee Process

In today's workplace, the personnel population extends beyond employees. You might need to track individuals who aren't employed by your organization, but who need personnel administration. PeopleSoft Human Resources helps consolidate and streamline nonemployee data entry, maintenance, retrieval, and reporting.

Nonemployees that you might want to add to the system include:

- Members of the board of directors who receive stock options.
- External students who attend training that is provided by your organization.
- Contractors and consultants.
- Temporary workers.

Nonemployees are added to the system in the same tables as employees and are assigned employee IDs. Use employee IDs to locate nonemployee records in most components in the system, just as you would with employees. For example, track competencies or assign positions for nonemployees in the same way that you do for employees.

You can pay nonemployees using PeopleSoft Global Payroll. If you are using PeopleSoft Payroll for North America or the Payroll Interface, you cannot. However, you can still enter compensation information.

Note. You cannot use the Add Non-Employee process to add pension or COBRA recipients to the system.

See Also

PeopleSoft Human Resources PeopleBook: Base Benefits, "Managing Cobra," Entering COBRA Elections and Waivers.

PeopleSoft Human Resources PeopleBook: Monitoring Health and Safety, "Tracking Personal Data for People Involved in Incidents," Entering Non-Employee Data

Pages and Fields That Are Unique to the Add Nonemployee Process

Use the Add Non-Employee component in the Administer Workforce menu to add nonemployees to the system. This component consists of the Personal Data, Job Data, and Employment Data pages. The add nonemployee process is identical to the Hiring process except that the system hides the information that isn't relevant to nonemployees. The following table lists the pages and fields that are unique to the Add Non-Employee process.

Page Name	*Add Non-Employee Fields*	*Description*
All Add Non-Employee pages	Status: Non-Employee	This display-only field appears at the top of each page in the Add Non-Employee process.
Name History	Per Type (personnel type)	Use this field to specify the type of nonemployee: *Applicant* (job applicant) *GP Dep/Ben* (Global Payroll dependent/beneficiary). Select this value only if your payroll system is PeopleSoft Global Payroll. *Independnt* (independent contractor) *Leased Wrk* (leased worker) *Non HR EE* (non-HR administered employee) *Stock NEE* (stock nonemployee) *Suc Candid* (succession candidate) *TempWorker* (temporary worker) *TLContrctr* (time and labor contractor) *Training* (training nonemployee) **Note.** You can't use the Add Non-Employee process to add a pension payee or COBRA participant, even though they appear in the available options.
Personal History	Referral Source Employee Referral ID Specific Referral Source	The system hides these fields. Use the Contract Data page to track nonemployee referrals.
Work Location	Action	The system fills in the default value *Add.* You can't change this value while you're using the Add Non-Employee process.
	Department	You must enter a department. If you added a dummy department code for nonemployees to the security tree, enter your nonemployee department here and use it to locate this employee's record during security searches.

Page Name	*Add Non-Employee Fields*	*Description*
Job Information	Job Code	You must enter a job code. If you added a dummy job code for nonemployees to the security tree, enter it here and use it to locate this employee's record during security searches.
Payroll	Pay Type	The system displays this field instead of the Employee Type field. Values are: *E* (exception hourly). *S* (salaried). *H* (hourly). *N* (not applicable).
Employment Information	Start Date Restart Date	The system displays the Start Date field instead of the Hire Date field and the Restart Date field instead of the Rehire Date field.
Disability	Per Status (personnel status)	Values are *Employee* and *Non-Employee.*
	Per Type (personnel type)	See the Personal Data - Name page description in this table for a list of values.
Contract Data	Per Status (personnel status)	See the Disability page description in this table for a list of values.
	Per Type (personnel type)	See the Personal Data - Name page description in this table for a list of values.
	Provider ID	Specify a nonemployee's actual provider, agency, or employer.

Setting Up Nonemployee Security

1. Add at least one nonemployee department for each setID to the security tree.
2. Create a job code that can be assigned to any non-employee in the system, if you do not plan to assign the same job codes as for your regular workforce. When you add nonemployees, assign them this special code so that they appear in database searches.
3. Choose to use your current departments or nonemployees.

   Using the department ID structure is useful when hiring contractors because you can tell in which department each contractor is working.

Setting Up a Nonemployee Provider

Before adding nonemployees to your system, define the different types of providers who supply nonemployees to your organization.

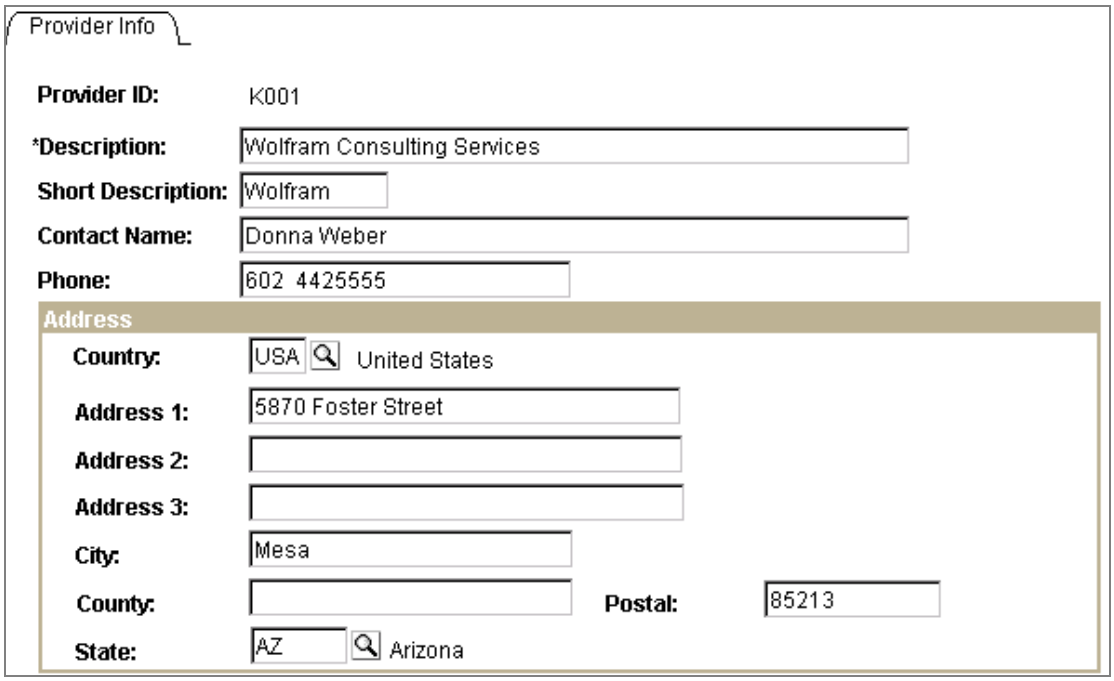
In this section, we discuss how to set up a nonemployee provider.

Page Used to Set Up a Nonemployee Provider

Page Name	Object Name	Navigation	Usage
Provider Info (provider information)	NEE_PROVIDER_TBL	Administer Workforce, Administer Workforce (GBL), Setup, Non-Employee Provider Table, Provider Info Administer Workforce, Administer Workforce (FPS), Setup, Non-Employee Provider Table, Provider Info	Define the provider, agency, or employer of a nonemployee.

Defining a Nonemployee Provider

Access the Provider Info page.



Provider Info page

Link this information to an employee on the Employment Data - Employment Information page or Contract Data page.

Adding Job Applicants

The Hire component is the most common component that you use to hire employees, but it's not the only component. You can also use the Hire Applicant component in the Recruit Workforce (GBL) and Administer Workforce (USF) business processes.

Use the Recruiting Your Workforce module in PeopleSoft Human Resources to track information about people who apply for jobs with your organization. This module includes a component called Hire Applicant that is designed especially for hiring job applicants. When you use this component to hire an applicant, the information you've already entered in the system becomes part of the employee's record.

Note. Federal users can also find information on hiring job applicants in the Recruit Workforce business process.

You assign employee IDs to job applicants differently than you do new hires. All other fields on these pages are documented earlier in this chapter.

Note. If you're using the Recruit Workforce business process in PeopleSoft Human Resources and hiring an applicant, the system completes the referral source with the information that you've already entered for that applicant.

Adding Concurrent Jobs

Note. Do not use the Concurrent Job component for adding temporary assignments where the substantive job must be suspended for the duration of the temporary assignment. Use the Job Data component.

PeopleSoft Human Resources enables you to keep complete job information about employees in your organization who hold more than one job at a time.

If you've set up PeopleSoft HRMS security to allow employees to have multiple jobs, you can add a concurrent job to an employee's employment record. Use the Add Concurrent Job component in Administer Workforce to enter new jobs for employees who already have one or more jobs. The component consists of the Job Data, Employment Data, Earnings Distribution, and Benefits Program Participation components. If all jobs are within the same company and meet certain criteria, you can combine earnings from multiple jobs on one paycheck if you are using PeopleSoft Payroll for North America.

In this section, we discuss how to:

- Set up multiple jobs.
- Work with multiple employment record numbers.
- Work with multiple benefit record numbers.

- Enter a concurrent job.

Setting Up Multiple Jobs

Before you can add multiple jobs for your workforce, you must select the Multiple Jobs Allowed option in PeopleSoft PeopleTools and update the user security so that users have access to the menu options they need.

Once an employee has more than one job, you might want to designate one job as primary and the others as secondary. The primary job designation is used for government reporting.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Multiple Jobs"

Working With Multiple Employment Record Numbers

The system uses employment record numbers to track data separately for each concurrent job. Each job must have a unique employment record number.

When you entered information on an employee's first job, the system automatically assigned the employment record number *0.* When you add other jobs to the system, you assign each one a different employment record number.

For the second job, we recommend you use employment record number *1.* For each additional job, you assign sequential numbers. The employment record number the corresponds to each job is 1 less than the job itself.

Job	*Employment Record Number*
1	0
2	1
3	2

Working With Multiple Benefit Record Numbers

In addition to an employment record number, you assign each concurrent job a benefit record number that tracks the employee's participation in benefit programs. Jobs that share the same benefit record number also share the same benefit programs.

The following tables show different ways to assign benefit record numbers in a situation where an employee has three concurrent jobs.

Apply Job 1's Benefits to All Jobs

	Employment Record No.	*Benefit Record No.*
Job 1	0	0
Job 2	1	0
Job 3	2	0

Apply Job 3's Benefits to All Jobs

	Employment Record No.	*Benefit Record No.*
Job 1	0	0
Job 2	1	0
Job 3	2	0

Apply Separate Benefits to Each Job

	Employment Record No.	*Benefit Record No.*
Job 1	0	0
Job 2	1	1
Job 3	2	2

Apply Job 1's Benefits to Jobs 1 and 2 and Separate Benefits to Job 3

	Employment Record No.	*Benefit Record No.*
Job 1	0	0
Job 2	1	0
Job 3	2	2

When you add a concurrent job, the system sets the default benefit record number on the Benefits Program Participation page to *0.* If you change the benefit record number, the system clears and repopulates the Benefit Program field with the data attached to the benefit record number you entered. If the benefit record number that you enter doesn't match any existing benefit record number for the employee, the system populates the Effective Date field with the employee's hire date and the Benefits Program field with the default benefit program for the employee's pay group.

Note. We recommend using the Benefit Program Participation page in the Administer Base Benefits menu to maintain benefits program information.

Entering a Concurrent Job

Here are the steps for adding a concurrent job for an employee:

1. Open the Add Concurrent Job component in the Administer Workforce menu.
2. Enter the employee's ID in the EmplID field.
3. The system assigns this job a new employment record number. The default number is the highest existing employment record number for that employee, plus 1. For example, if the employee's highest existing employment record number is 2, the system assigns 3 as the new job employment record.
4. Complete the pages in the component as needed for the new job.

See Also

"Entering Additional Data in Human Resource Records," Setting Up and Tracking Temporary Assignments

CHAPTER 6

(USF) Hiring Employees

This chapter provides an overview of hiring employees and discusses how to:

- Use the Personnel Action Request (PAR) process to hire employees.
- Assign employees to positions.
- Enter education information.
- Understand default values for employment data.
- Hire job applicants.
- Add concurrent jobs.

Using the Personnel Action Request Process (PAR) to Hire Employees

There are four different hiring processes depending on the individual situation. These are the navigational paths used for each process:

- Administer Workforce, Administer Workforce (USF), Use, Hire
- Administer Workforce, Administer Workforce (USF), Use, Concurrent Hire
- Develop Workforce, Recruit Workforce (USF), Use, Hire Applicant

Each navigation path leads to a common hiring component with identical object names. The hiring component contains seven pages. Each page stores specific information required for the PAR hiring process, as well as links to supplemental pages that provide further details for the information entered on the primary page.

To request a new hire, use the Hire request component. Enter personal information, employment information, job data, job earnings distribution information, and benefit program choices. You must enter this information before you can perform any other human resource tasks in PeopleSoft Human Resources. Because many of the fields on these pages are required, enter information in all the pages *before* saving your entries.

See Also

"USF Administering Personnel Action Requests"

Pages Used to Hire Employees

There are twenty-seven pages used throughout the PAR hiring process. The following table provides the navigation and general usage information for each page.

Page Name	*Object Name*	*Navigation*	*Usage*
Data Control	GVT_JOB0	Administer Workforce, Administer Workforce (USF), Use, Hire, Data Control	Enter information for the hiring process, such as the NOA code, approving authorities, PAR remarks, and tracking information. Many of the values you enter on this page become the default source for values on other pages throughout the system. If necessary, you can override most of these default entries when you are working on other pages. After completing this page, you can print out the Personnel Action Request form or print a notice for this position.
Data Control: Award Data	GVT_AWD_DATA	Administer Workforce, Administer Workforce (USF), Use, Supervisor Request or HR Processing, Data Control, Award Data	Define the award set up in the Supervisor Request - Data Control page.
Data Control: PAR Remarks	GVT_PAR_PROCESS_RK	Administer Workforce, Administer Workforce (USF), Use, Hire, Data Control, PAR Remarks	Enter comments specific to this position or employee situation.
Data Control: Tracking Data	GVT_EE_CNTRL_SEC	Administer Workforce, Administer Workforce (USF), Use, Hire, Data Control, Tracking Data	View or enter job-tracking information.

Page Name	*Object Name*	*Navigation*	*Usage*
Personal Data	GVT_PERS_DATA1	See paths listed previously.	Enter information on the employee, such as name, address, birthplace, education, military service, citizenship, veteran, marital status, race or origin, and handicap.
Personal Data: Additional Birth Information	GVT_BRTHINF_SEC	Administer Workforce, Administer Workforce (USF), Use, Hire, Personal Data, Additional Birth Information	Enter further birth information.
Personal Data: Address Information	GVT_ADDRINF_SEC	Administer Workforce, Administer Workforce (USF), Use, Hire, Personal Data, Address Information	Enter home and mailing address information.
Personal Data: Personal Phone Numbers	GVT_PERS_PH_SEC	Administer Workforce, Administer Workforce (USF), Use, Hire, Personal Data, Personal Phone	Enter employee phone, fax, cellular, and other numbers.
Personal Data: Veterans Info	GVT_VETINF_SEC	Administer Workforce, Administer Workforce (USF), Use, Hire, Personal Data, Veterans Info	Enter veteran information.
Personal Data: Marital Info	GVT_MARITAL_SEC	Administer Workforce, Administer Workforce (USF), Use, Hire, Personal Data, Marital Info	Enter marital information.
Job	GVT_JOB1	See paths listed previously.	Enter information on the employee's job, agency, and department. Also enter benefit/retirement data.
Job: Benefits/Retirement Data	GVT_BENDATA_SEC	Administer Workforce, Administer Workforce (USF), Use, Hire, Job, Benefits/Retirement Data	Specify the benefit program in which the employee is enrolled in PeopleSoft Human Resources or in PeopleSoft Benefits Administration.

Page Name	Object Name	Navigation	Usage
Job: FEGLI/Retirement/FICA (Job: Federal Employees Group Life Insurance/Retirement/Federal Insurance Contributions Act)	GVT_BENDATA1_SEC	Administer Workforce, Administer Workforce (USF), Use, Hire, Job, FEGLI/Retirement/FICA	Enter retirement data.
Job: Departmental Hierarchy	GVT_DEPTINF_SEC	Administer Workforce, Administer Workforce (USF), Use, Hire, Job, Departmental Hierarchy	View departmental hierarchy for the position.
Job: Detail	GVT_DETAIL_SEC	Administer Workforce, Administer Workforce (USF), Use, Hire, Job, Detail	Track information for employees on assignment. You probably won't use this page when first hiring an employee.
Position	GVT_JOB2	See paths listed previously.	Enter employee type, class, position type, shift, and pay group.
Compensation Data	GVT_JOB3	See paths listed previously.	Enter information on the employee's compensation, including pay rate and basis, pay plan/table/grade, frequency, quoted and other pay. Also enter accounting information.
Compensation: Other Pay	GVT_OTH_PAY_SEC	Administer Workforce, Administer Workforce (USF), Use, Hire, Compensation, Other Pay Information	Enter compensation that employees receive that’s in addition to base pay.

Page Name	*Object Name*	*Navigation*	*Usage*
Compensation: Expected Pay	GVT_LOC_PAY_SEC	Administer Workforce, Administer Workforce (USF), Use, Hire, Compensation, Expected Pay.	View the various pay rate and compensation calculations the system calculates and displays based on the Base Pay and Comp Frequency you enter on the Compensation Data page.
Compensation: Accounting Information	GVT_JOBDIST_SEC	Administer Workforce, Administer Workforce (USF), Use, Hire, Compensation, Accounting Info.	View a summary of the employee's job earnings distribution.
Employment Data 1	GVT_EMPLOYMENT1	See paths listed previously.	Enter employee service computation and conversion dates, within-grade-increase data, and other employment-related information.
Employment 1: Expiration Dates	GVT_EXPIRDT_SEC	Administer Workforce, Administer Workforce (USF), Use, Hire, Employment 1, Exp Dates	Enter expiration dates for temporary promotions, position changes, sabbaticals, or detail assignments.
Employment 1: Appointment Info	GVT_APPDATA_SEC	Administer Workforce, Administer Workforce (USF), Use, Hire, Employment 1, Appt Info	Enter appointment limits.
Employment Data 2	GVT_EMPLOYMENT3	See paths listed previously.	Enter union, probation, RIF, tenure, and security data. Also record the retained grade and reports to information.
Employment 2: Employment Phone Numbers	GVT_EMPL_PH_SEC	Administer Workforce, Administer Workforce (USF), Use, Hire, Employment 2, Phone Nbrs	Enter employee phone numbers.

Page Name	Object Name	Navigation	Usage
Employment 2: Non Pay Data	GVT_NONPAY_SEC	Administer Workforce, Administer Workforce (USF), Use, Hire, Employment 2, Non Pay Data	Track information related to a status of non-pay. Information on this page affects FEHB eligibility and FEGLI.
Employment 2: Security Info	GVT_SECURTY_SEC	Administer Workforce, Administer Workforce (USF), Use, Hire, Employment 2, Security Info	Enter information related to the employee's security clearance and financial disclosure.

Common Elements Used in This Chapter

Transaction#/Sequence — Set by default to *1/1*—the correct numbers for new employees. Your agency can use these numbers to track both the individual transactions for this employee and the multiple administrative actions that occur on the same day.

This field controls the order in which actions are processed internally and the order in which they are output across interfaces. After you save a request, the system automatically increments it by one for each new action effective on the same day. If human resources personnel perform a correction of the original hire request, the correction's assigned value is *1/2* (*1* is the transaction number for this particular action for this employee on this day and *2* is the sequence number for any correction of this action for this employee on this day).

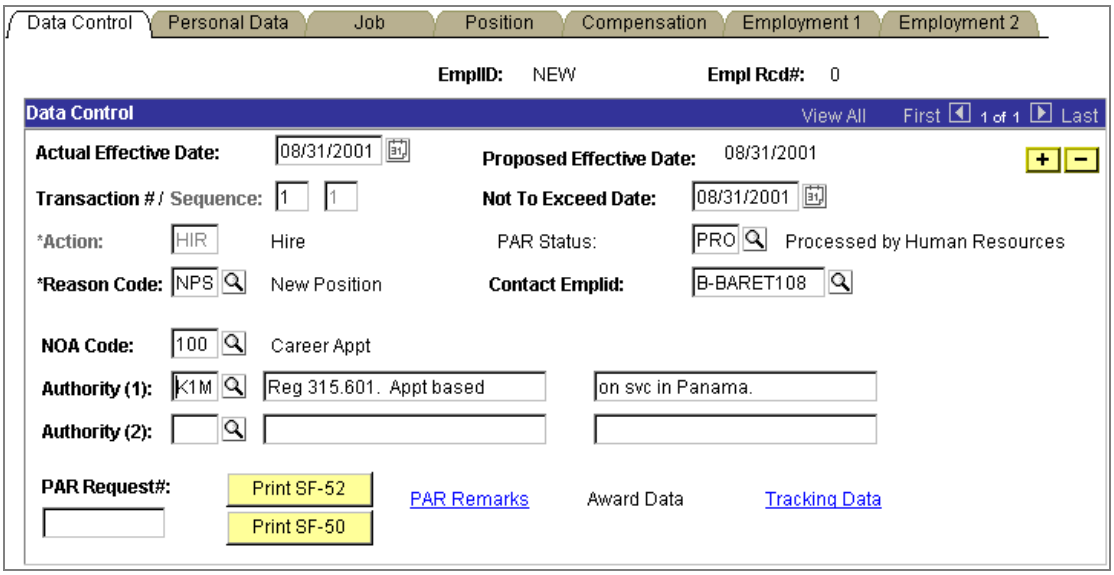
NOA Code (nature of action code) — The reasons for a hire action request.

PAR Status — References the status of this request within the PAR request/approval process. On the Data Control page, this field is set by default to *Processed by HR,* which is the correct choice for new employees. The value that remains after you leave this page is the default value on other pages within the component.

OK — Click to close this page.

Entering Information for the Hiring Process

Access the Hire - Data Control page.



Hire - Data Control page

Actual Effective Date Enter the actual effective date, which is used as the Hire action's effective date default value throughout the system. If necessary, change this to reflect the date on which you hired the employee. When working on other pages, the dates are unavailable, so if you need to change the effective date, you do so by returning to the Data Control page.

Proposed Effective Date The Proposed Effective Date field is populated by default with the date entered in the **Actual Effective Date** field. Human resources personnel processing a request have final authority on when the action becomes effective, and they will enter the official actual effective date, but the proposed effective date will remain unchanged.

Not to Exceed Date (Optional) Enter the ending date of a temporary action (for example, the date a temporary hire expires).

Action The default value is set to ***Hire,*** which is the correct value for new employees.

Reason Code Enter the reason code for this hire, such as new position, temporary assignment, or trainee.

Note. For agency-to-agency transfers, the request may be submitted by both agencies, and the action and reason for each agency's request depends on whether the employee is arriving or leaving. If the employee is arriving, process the action as a hire. When an employee transfers in to your agency from another agency, the action is ***Hire*** and the reason is ***Transfer From*** (another agency). When an employee transfers out of your agency to another agency,

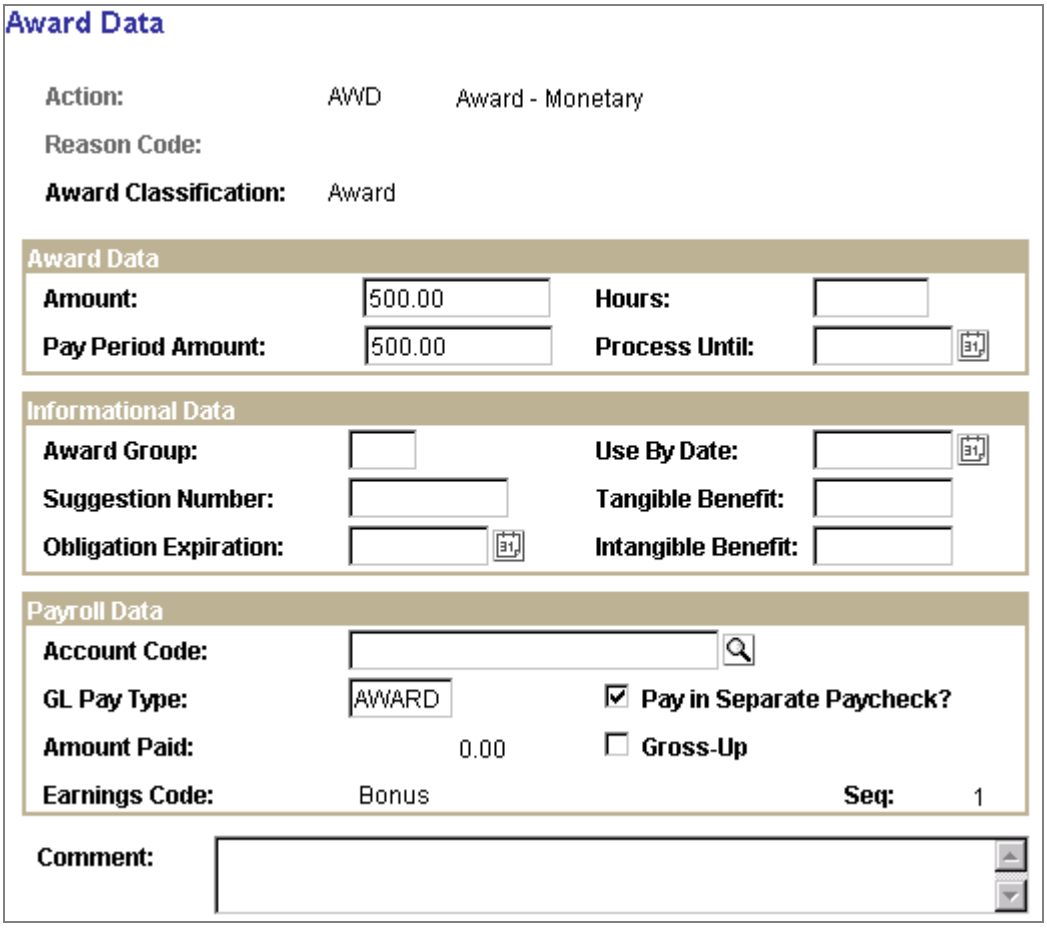
	the action is ***Terminate*** and the reason is ***Transfer To*** (another agency).
Contact EmplID (contact employee ID)	Enter the employee ID of the person to contact with any questions regarding the hire.
NOA Code (nature of action)	
Authority (1)	Select the appropriate authority for this NOA code. This field is usually reserved for use by human resources officials.
PAR Request # (PAR request number)	(Optional) Enter a PAR request number for each employee request after you save this request. This field is for your agency's information only.
PAR Remarks	Click this link to view or enter comments specific to this position or employee situation.
Tracking Data	Click this link to view or enter job-tracking information.
Award Data	Click this link to view or enter award information.

See Also

"USF Administering Personnel Action Requests"

Defining Award Set Up

Access the Hire - Data Control: Award Data page.



Hire - Data Control: Award Data page

Amount — Enter the award amount. The Pay Period Amount is set by default to 100 percent of the award amount for most types of awards. Change if necessary.

Process Until — If you change the Pay Period Amount to increments because you want the award to be paid over time, enter a process until date.

Award Group — Enter the award group for informational purposes.

Use By Date — Enter the use by date for informational purposes.

Suggestion Number, Tangible Benefit, Obligation Expiration, and **Intangible Benefit** — Enter values as appropriate.

GL Pay Type (general ledger) pay type) — Enter the payroll data. The **Pay in Separate Paycheck** or **Gross-Up Pay** check boxes are set by default to the values you entered on the Data Control page.

Amount Paid and Earnings Code — The system sets these fields by default and tracks this information.

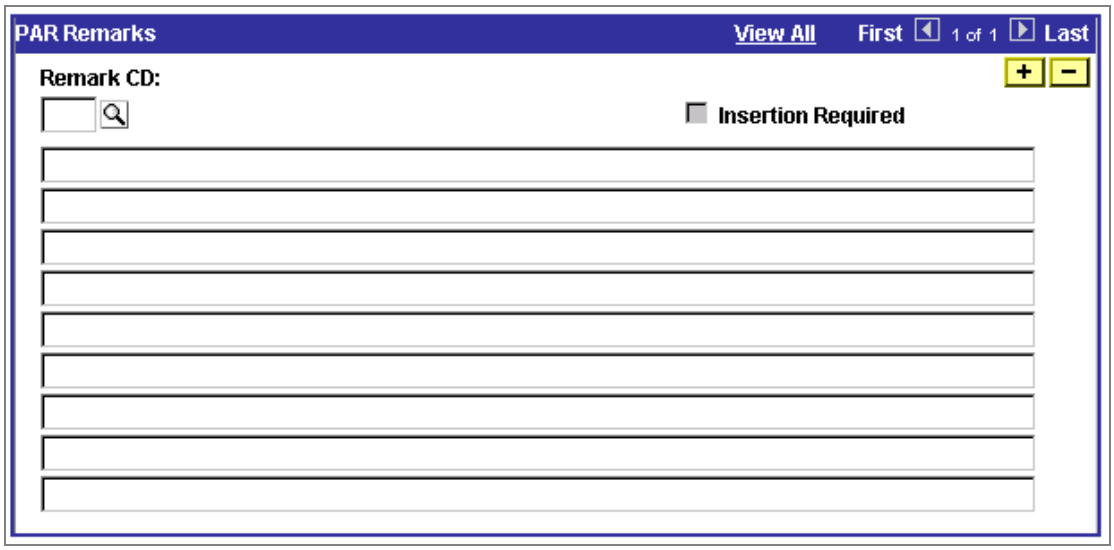
Comment Enter any comments.

See Also

PeopleSoft Payroll for North America PeopleBook, "Introducing PeopleSoft Payroll for North America"

Entering PAR Remarks

Access the Data Control: PAR Remarks page.

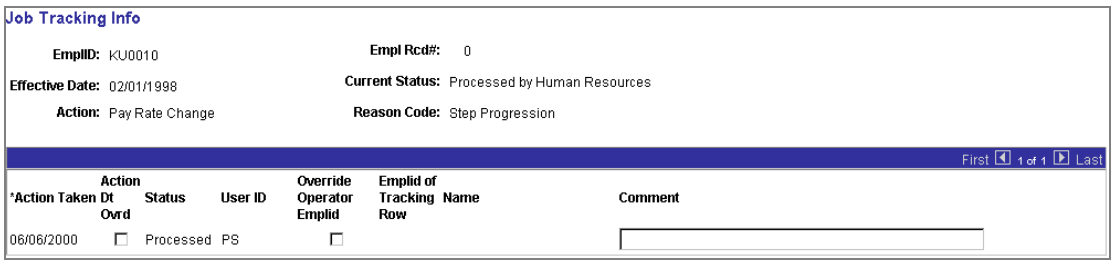


Data Control: PAR Remarks page

Remark CD (remark code) Select from the list of descriptions, conditions, and comments about this position or employee action. The remarks that you select appear in the comments box. Edit them as necessary.

Entering Job Tracking Information

Access the Data Control: Tracking Data page.

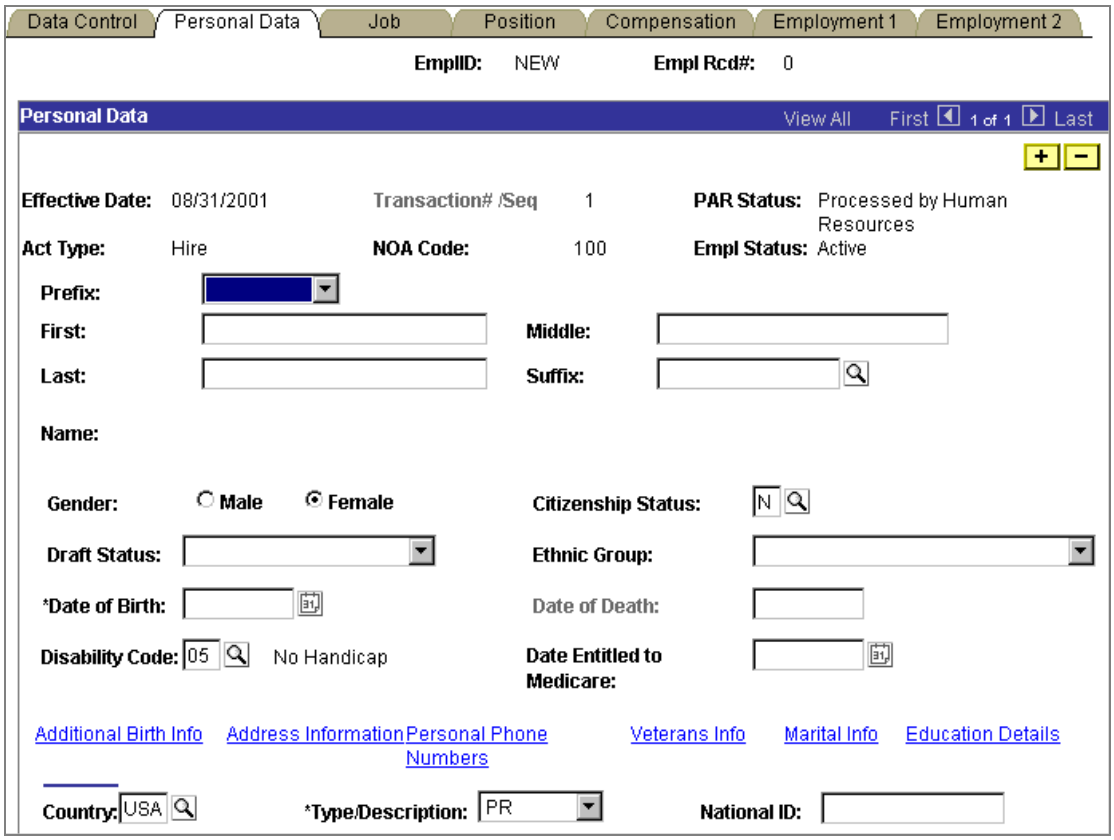


Data Control: Tracking Data page

Action Taken	The date this initial action request was entered.
Action Dt Ovrd (action date override)	Select this check box to make the Action Taken field available for entry so that you can enter the actual date if it differs from the action date.
Override Operator Emplid (override operator employee ID)	(Optional) Select this check box when an administrative assistant, for example, enters data on behalf of a supervisor.
Emplid of Tracking Row (employee ID of tracking row)	When the **Override Operator Emplid** check box is selected, this field becomes available for entry. Enter the ID of the person actually performing the data entry.
Status (work-in-progress status)	Displays the most current PAR tracking status.
WIP Seq (work in progress sequence)	Displays the most current sequence number of this request.
Emplid (employee ID)	The employee ID of the employee who is inputting the action.
Empl Rcd# (employee record number)	The employee record number of the employee who is inputting the action.

Entering Additional Personal Employee Information

Access the Personal Data page.



Personal Data page

Name History

See Also

PeopleSoft HRMS PeopleBooks Preface, "About These HRMS PeopleBooks," PeopleBooks Standard Page Element Definitions

EmplID If you instructed the system to assign the employee ID automatically, this field displays ***NEW.*** This changes to the next available number after you complete all the Hire pages and click the **Save** button. If you assigned the ID manually, the number appears immediately.

Personal Data The effective date for all of the pages in this group box is set by default to the effective date that is entered on the Data Control page. Change the effective date by returning to the Data Control page.

Gender Indicate the employee's gender.

Format for Country Many countries have unique name formats. Select the country with the name format you want to use for this person. When you move out of this field, the system displays the appropriate fields for the country you entered.

Date of Birth	Enter the employee's date of birth. If you do not enter a birth date, a warning message appears when you save the record. Though this field isn't required for the Administering Workforce business process, the system uses the date in some benefit and payroll tasks to calculate an employee's age. If you do not have the birth date currently, after you acknowledge the message, you can continue entering information. However, PeopleSoft recommends that you enter the information later.
Date of Death	Skip this field when hiring a new employee.
Citizenship Status	Select the appropriate citizenship status.
Ethnic Group	Select the employee's ethnic group. Values are based on U.S. federal Equal Employment Opportunity (EEO) ethnic categories. Use ethnic group information to compile the establishment's Affirmative Action (AA) plan and to generate several EEO reports.
Draft Status	(Optional) Select a draft status.
Disability Code	Select the disability code from the list, or if none, select the value ***no handicap.***
Date Entitled to Medicare	(Optional) Enter the date the employee is entitled to Medicare.
Type/Description	Enter the corresponding type/description of the employee's national ID.

See Also

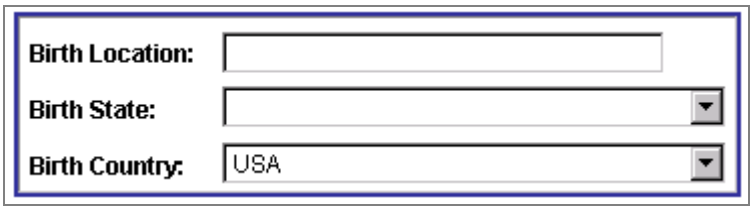
"USF Processing Personnel Action requests," Requesting Terminations Due to Death

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "(USA) Meeting Regulatory Requirements for the United States

PeopleSoft Human Resources PeopleBook: Base Benefits, "Introduction to PeopleSoft Base Benefits"

Entering Birth Information

Access the Personal Data: Additional Birth Information page.

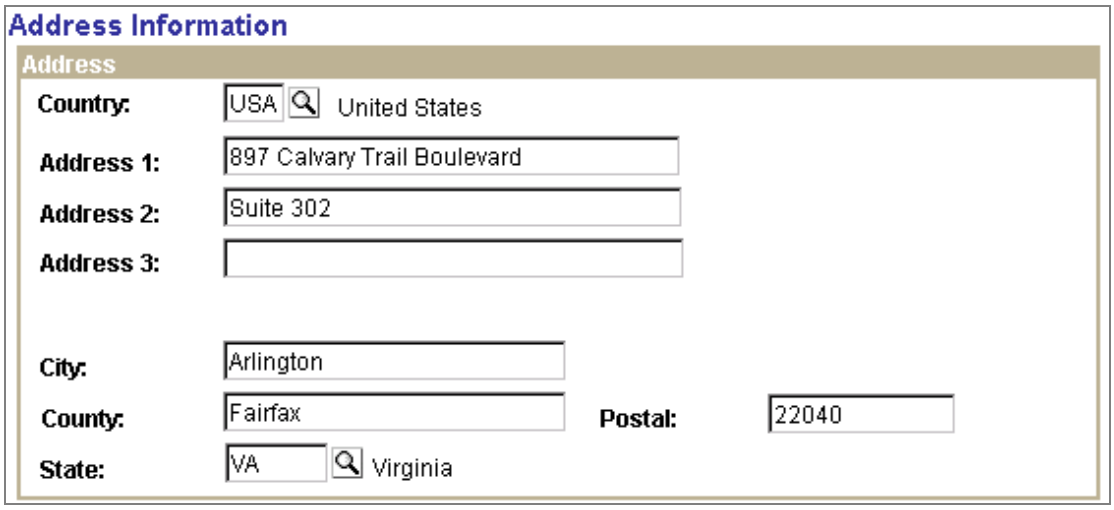


Personal Data: Additional Birth Information page

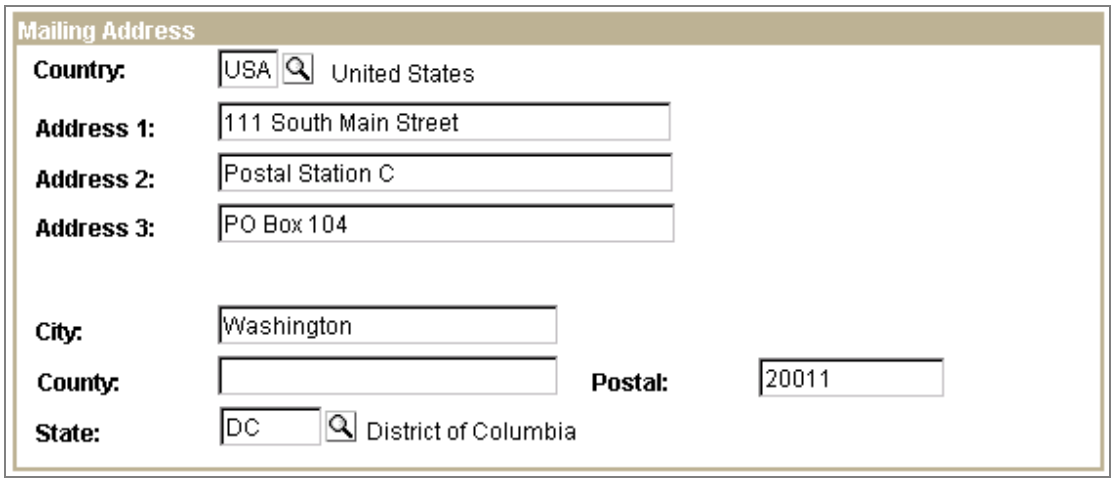
Birth Location	Enter the name of the city.
Birth State	Select the birth state.
Birth Country	Select the birth country.

Entering Address Information

Access the Personal Data: Address Information page.



Personal Data: Address Information page (1 of 2)



Personal Data: Address Information page (2 of 2)

When you enter a country and move out of the field, the address fields change to display the address format of that country.

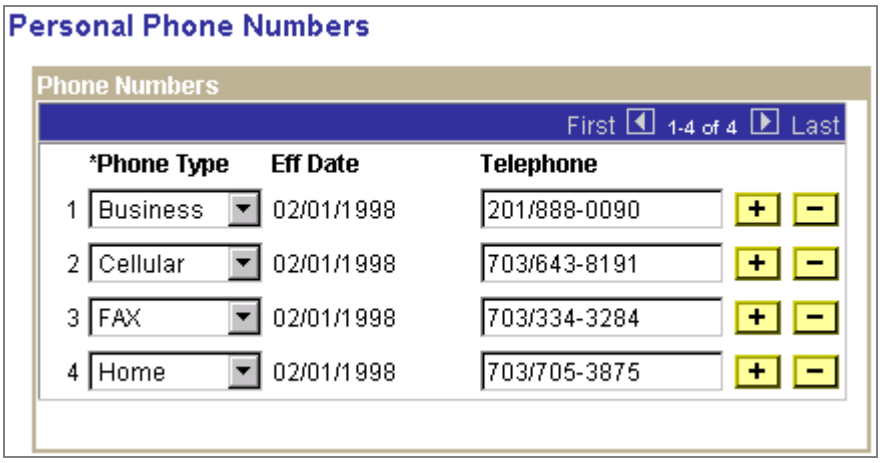
See Also

PeopleSoft HRMS PeopleBooks Preface, "About These HRMS PeopleBooks," PeopleBooks Standard Page Element Definitions

PeopleSoft Benefits Administration PeopleBook, "Defining Eligibility Rules"

Entering Employee Personal Phone Information

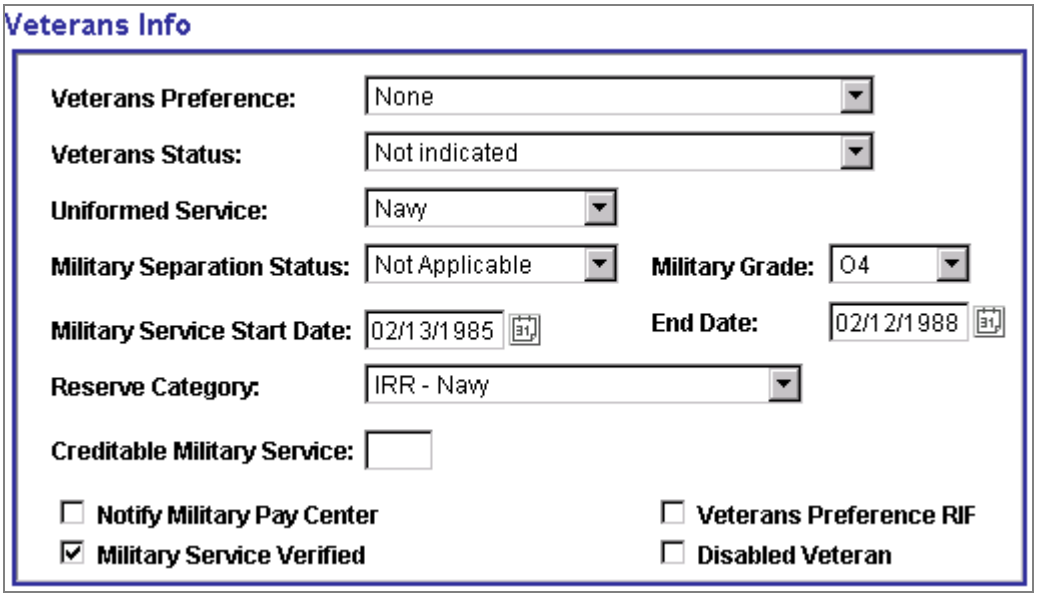
Access the Personal Data: Personal Phone Numbers page.



Personal Data: Personal Phone Numbers page

Entering Veteran Information

Access the Personal Data: Veterans Info page.

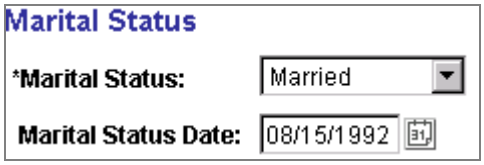


Personal Data: Veterans Info page

Veterans Preference	Select the veteran's hiring preference that applies. For information about preference guidelines refer to the *U.S Office of Personnel Management's VetsInfo Guide*.
Veterans Status	Indicate the veteran's status.
Uniformed Service	Select the type of uniformed service in which this veteran served.
Military Grade	Select the veteran's military grade.
Military Service Start Date/End Date	Enter the veteran's military service start and end dates.
Reserve Category	Select the employee's reserve category, or select ***Not Applicable.***
Creditable Military Service	Enter the creditable military service.
Notify Military Pay Center	Indicate whether to notify the military pay center.
Veterans Preference RIF (Reductions In Force)	Indicate whether the employee is eligible for veteran's preference in instances of Reductions In Force. See the *U.S. Office of Personnel Management's VetsInfo Guide* for more information.
Military Service Verified	Select this check box if you have received verification of service.
Disabled Veteran	Select this check box if the veteran is disabled.

Entering Marital Information

Access the Personal Data: Marital Info page.



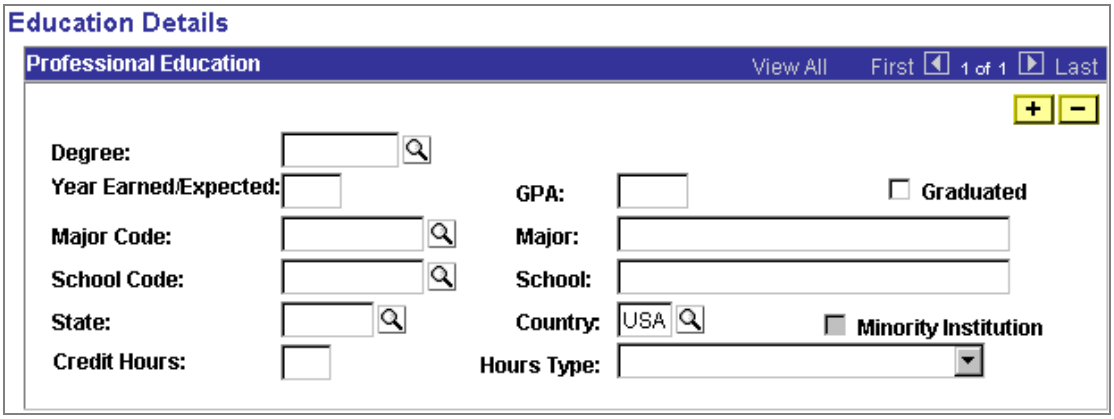
Personal Data: Marital Info page

Marital Status	Select the person's marital status.
Marital Status Date	Enter the date on which this status took effect.
EOD Dt (enter on duty date)	After you complete the Hire process (when the action specified on the Job Data page is *Hire*), the system adds a field to the Employment Data 1 page. This date is the same as the effective date on the Job Data page.

Entering Education Details

Note. The Education Details page link is active only during the hiring process. To update education information on existing employees use the Professional Education and Training page through the Develop Workforce, Manage Competencies, Use navigation.

Access the Personal Data: Education Details page.



Personal Data: Education Details page

Degree Select the degree earned or expected for the employee.

Note. This information must be set up on the Degree Table page in the Administer Training, Setup menu.

Year Earned/Expected Enter the year the degree was earned or is expected to be earned if the employee has not graduated.

GPA (grade point average) Enter the employee's grade point average from the school.

Graduated Select if the employee has graduated.

Major Code Select the major code for the degree earned or being earned.

Major Enter a major if there is not a code for it.

School Code Select the code designating the school the employee graduated from or currently attends.

School Enter a school if there is not a code for it.

State Enter the state where the employee resides.

Country Select the country where the employee resides.

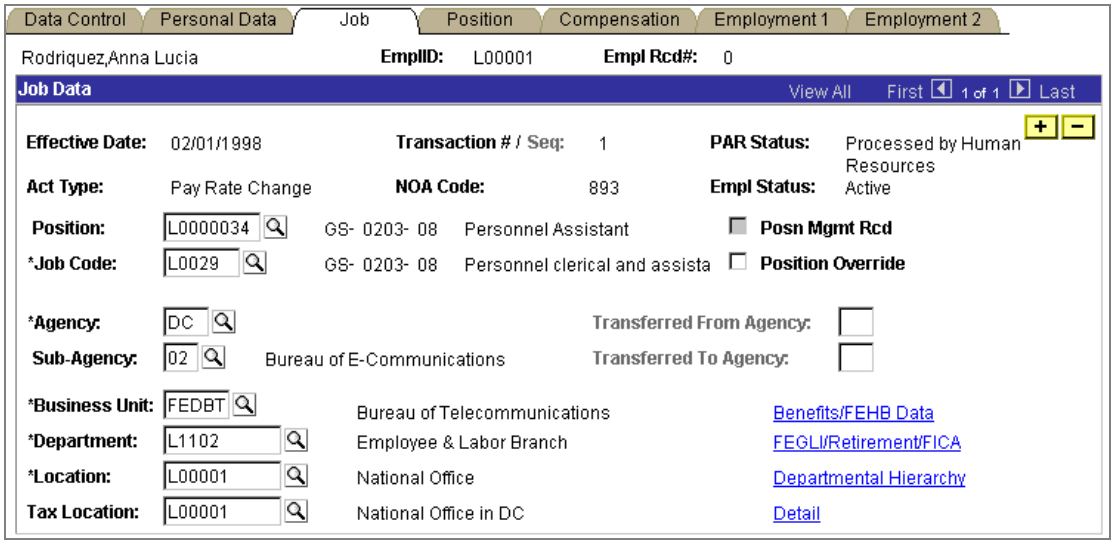
Minority Institution Select if the employee attended or attends a designated minority institution.

Credit Hours Enter the credit hours earned either upon completion or to this point if not complete.

Hours Type Select the hours type from these options: ***Continuing Education, Other Pay, Quarter Hours,*** and ***Semester Hours.***

Entering Job Information

Access the Job page.



Job page

Many values on this page are set by default from values you entered earlier on the Data Control page. If necessary, override most of these defaults.

Act Type (action type) Set by default to ***Hire,*** which is the correct choice for new employees.

Position Select a position. When you move out of this field, the system completes position-related fields with default data from the Position Data pages if position management is being used. Job code, agency, subagency, business unit, department, and location all are set by default to position management data.

In addition, the system inserts a default value in the **Supervisor's ID** and **Reports to Position** fields on the Employment Data 2 page if these are entered when setting up the position.

If you've associated agencies with departments on the Department page, the system enters the agency code on the Job Data page and the field is unavailable for entry. It also enters default values on the Position Data page for the Pay Periods/Year, Employee Type, Holiday Schedule (which you define in the Pay Group table), and Pay Group fields (which you associate with a position on the Position

	Data pages in the Develop Workforce, Manage Positions menu). On the Position Data page, the system enters the standard hours that correspond to the job code. If you've associated them with the job code on the Job Code page, the system also enters the pay plan/table/grade, and compensation frequency on the Compensation Data page. In addition, on the Compensation Data page, the system enters the grade/step entry (date), which is the date the employee was first assigned to the grade and step. The Position Number, Hire Date, and Position Override fields are discussed in Hiring Employees Into Positions.
Posn Mgmt Rcd (position management record)	This check box indicates that updates to the Position Management record are now reflected here. For hiring, this field is selected as the new hire would not have information to update.
Job Code	The job code is derived from the value established on the Position Data pages.
Position Override	Select this check box to change any of the position-related fields, such as the **Job Code, Department, Agency,** and **Sub-agency.** PeopleSoft Human Resources issues a warning message if you assign an employee to a position that has already been filled by another employee or if a new employee appointment exceeds the maximum head count for that position. **Note.** After you have assigned an employee to a position, you must maintain all employee data manually while the employee is assigned to this position in the system. The system won't update position data automatically for the employee when position information is changed.
Agency/Sub-Agency	After you have entered the position number, if you assigned an agency to a department on the Department page, default agency and subagency codes appear here. You cannot change them. To override the agency value, or if you didn't designate one on the Department page, select the Position Override check box and then select an agency.
Transferred From Agency	If the reason code entered on the Data Control page was *Transfer*, select the agency from which the employee is transferring.
Transferred To Agency	This is not a valid field in the hiring process. This field is used primarily in other types of PAR requests. It becomes active based on the action and reason code entered on the Data Control page.

Agency, Sub-Agency, Business Unit, Department, and **Location**	Select the ID types for these fields individually. If the position management hiring process is used, the system enters default values here when the *Position* ID is selected.
Tax Location	Derived from the department-tax location relationship established on the Department page.

See Also

"USF Processing Personnel Action Requests"

"Overview of the Hiring Process," **Hiring When You Use Position Management**

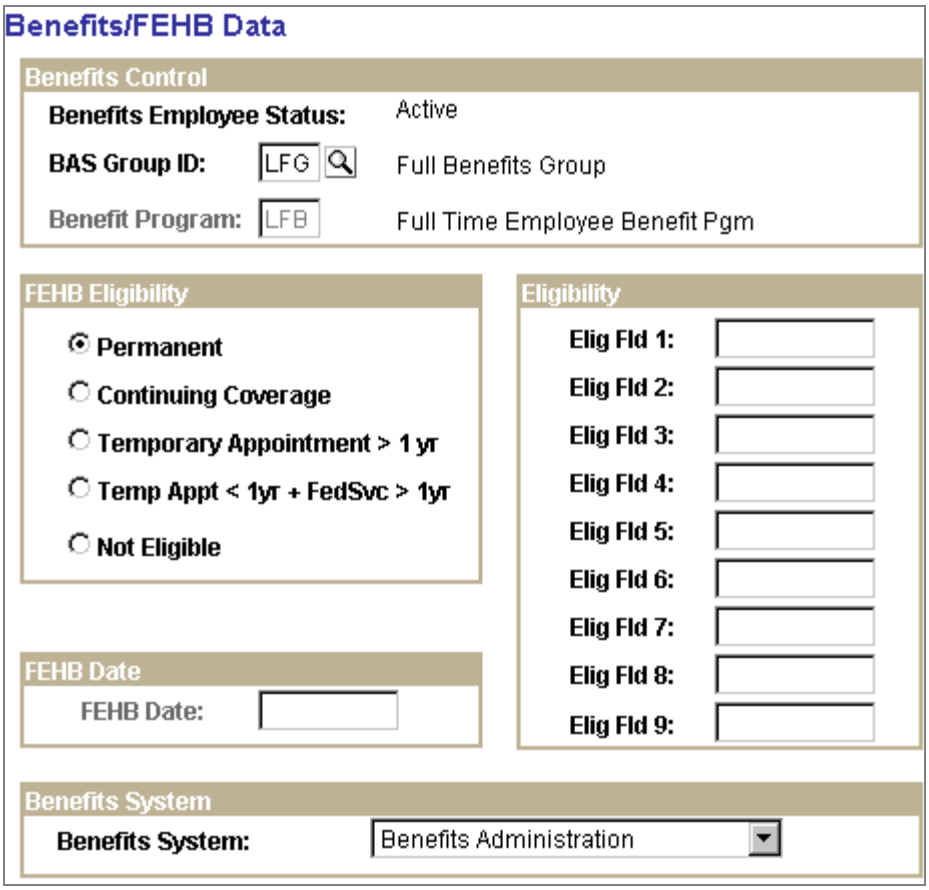
PeopleSoft Payroll for North America PeopleBook, Introducing PeopleSoft Payroll for North America

PeopleSoft Payroll Interface PeopleBook, "Setting Up PeopleSoft Payroll Interface," Preparing Your Payroll Process

PeopleSoft Human Resources PeopleBook: Manage Positions, "Managing Position Data"

Specifying Benefit Programs

Access the Job: Benefits/Retirement Data page.



Job: Benefits/FEHB Data page

BAS Group ID (benefits administration system) (Optional) Enter a BAS group ID.

Benefit Program (Optional) Enter a benefit program.

FEHB Eligibility (federal employees health benefits eligibility) Select the appropriate option to indicate the FEHB eligibility. If you select ***Not Eligible,*** the **FEHB Date** field becomes available for entry. This typically applies to temporary employees.

FEHB Date (federal employees health benefits date) Enter the date that the employee is eligible for FEHB.

Eligibility

Elig Fld 1 – 9 These fields further define an employee's benefits eligibility. Each agency determines its own use of these fields. Contact the agency's Personnel Policy Officials for instruction using these fields.

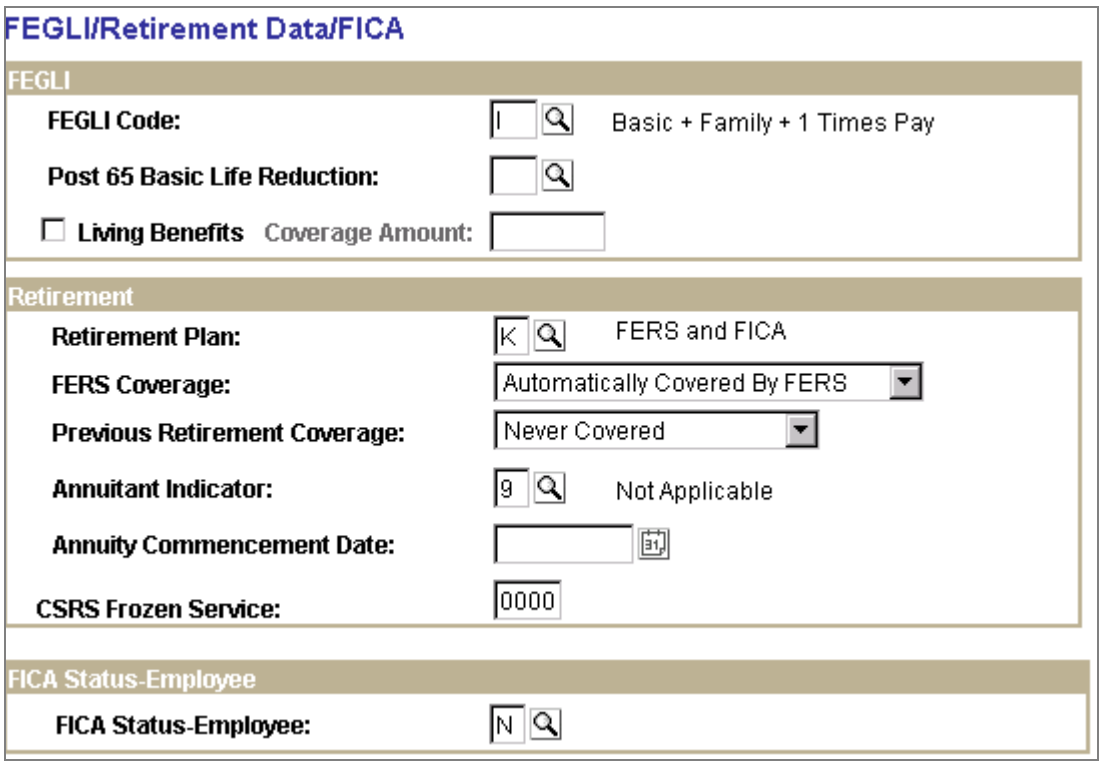
Benefits System Select which PeopleSoft Benefits system you are using to administer this employee's benefits: PeopleSoft Base Benefits or Benefits Administration.

See Also

PeopleSoft Human Resources PeopleBook: Base Benefits, "Introduction to PeopleSoft Base Benefits"

Entering Retirement Data

Access the Job: FEGLI/Retirement/FICA page.



Job: FEGLI/Retirement/FICA page

FEGLI

FEGLI Code (federal employees group life insurance code) Enter the FEGLI code.

Post 65 Basic Life Reduction Select the employee's post-65 basic life reduction coverage.

Living Benefits/Coverage Amount Use this field only when selecting living benefits (not during the hiring process).

Retirement

Retirement Plan

Select the employee's retirement plan.

In addition to the retirement plans used for submission to Central Personnel Data File (CPDF), PeopleSoft supplies the following codes that you may use for documentation purposes only:

Code	*Explanation*
7	For foreign national employees exempt from retirement and from social security and Medicare tax deductions.
8	U.S. Court of Veterans Appeals without election of survivor annuity benefits. Code is for use by the judges of the U.S. Court of Veterans Appeals only.
9	U.S. Court of Veterans Appeals with election of survivor annuity benefits. Code is for use by the judges of the U.S. Court of Veterans Appeals only.
A	Article III judges and justices.
B	Bankruptcy judges and justices under the Judicial Retirement System.
S	U.S. Claims Court Judges Retirement System.
V	Clerks/magistrates (CSRS).
U	Bankruptcy judges (full FICA/partial CSRS).
Y	Bankruptcy judges (full FICA/full CSRS).

FERS Coverage (Federal Employees Retirement System coverage)

Select the employee's FERS coverage.

Previous Retirement Coverage

Select the employee's previous retirement coverage.

Annuitant Indicator

Select the employee’s annuitant indicator.

Annuity Commencement Date

If the new employee is a reemployed annuitant, enter the annuity commencement date.

CSRS Frozen Service (Civil Service Retirement System frozen service)

Enter the total years and months of civilian and military service that is creditable in a CSRS component of a FERS employee, or, in the case of a CSRS offset employee, the service that would be included in a CSRS component if the employee ever becomes covered by FERS.

FICA Status-Employee

FICA Status-Employee Indicate whether the employee is exempt, subject, or subject to Medicare only.

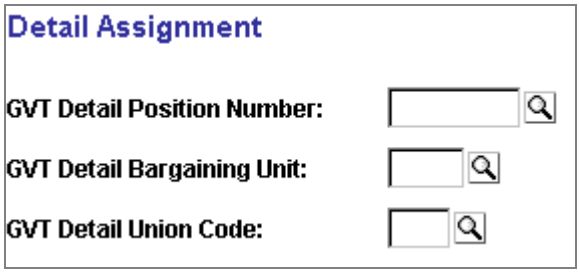
See Also

"USF Processing Personnel Action Requests," Requesting Terminations Due to Death

PeopleSoft Human Resources PeopleBook: Base Benefits, "Introduction to PeopleSoft Base Benefits"

Viewing Detail Assignment Data

Access the Job: Detail page.



Job: Detail page

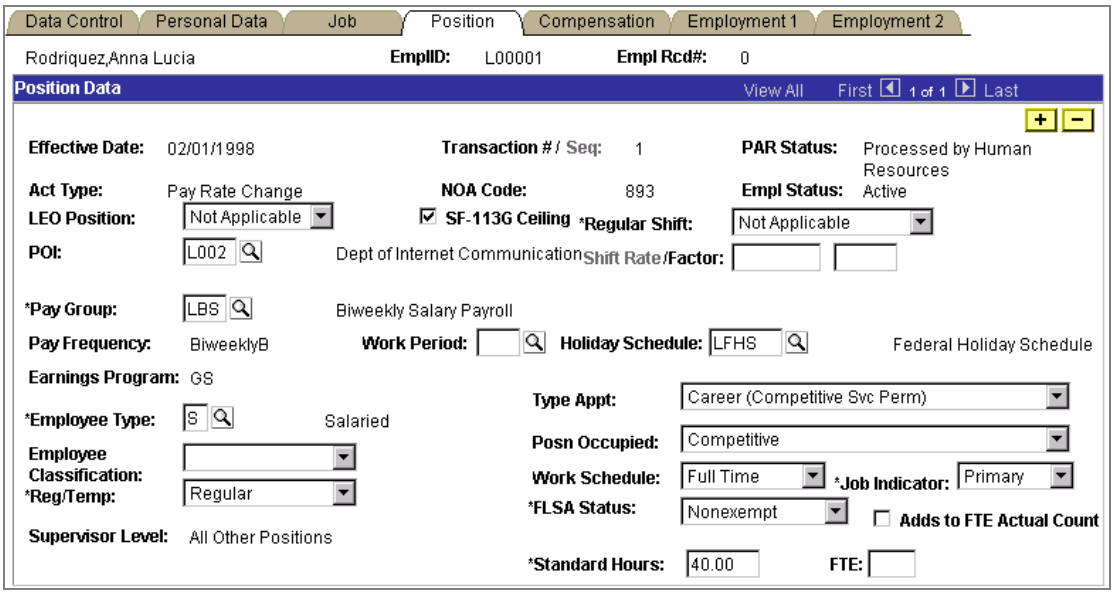
GVT Detail Position Number (government) Select the employee's detail position number.

GVT Detail Bargaining Unit (government) Select the employee's detail bargaining unit.

GVT Detail Union Code (government) Select the employee's detail union code.

Entering Position Information

Access the Position page.



Position page

LEO Posn (law enforcement officer position) — If this is a law enforcement officer position, a value appears from the Job Code page.

SF-113G Ceiling — If this position is reportable for the SF-113G ceiling, select this check box.

POI (personnel office identifier) — Set by default from the Position Data pages or the Job Code page.

Regular Shift — If the employee is working shifts, select the appropriate shift.

Shift Rate/Factor — Define the shift rate/factor only if the shift differential is specified at the employee level.

Pay Group — (Required) A value appears here if you defined one on the Position Data page. Otherwise, select a pay group.

Pay Frequency — Set by default from the Pay Group page.

Holiday Schedule — If you linked an established holiday schedule on the Pay Group page, it appears here.

Employee Type — Depends on the pay group and is set by default from the Pay Group page. If an employee type doesn't exist for this pay group, establish one on the Pay Group page or enter one here.

Employee Classification — Provides another method of grouping employees.

Reg/Temp (regular/temporary) — Indicate whether the new hire is a regular or temporary employee. The Benefits module of PeopleSoft Human Resources uses this value when determining eligibility requirements.

Supervisor Level	If the employee is in a supervisory position, this value is set by default from the Position Data page.
Type Appt (type of appointment)	Enter the employee's type of appointment, such as ***Career*** (Competitive Service Permanent), ***Limited, Executive,*** or ***Schedule A - C.***
Work Schedule	Set by default from the Position Data page.
Standard Hours	The field is populated by default with the standard hours for the agency as specified in the Installation tables. You can change this information manually.
FLSA Status (Fair Labor Standards Act status)	Set by default from the position data on the Job Code page.
Work Period	Select the time period in which employees must complete the standard hours. The system uses the annualization factor of the standard work period, in combination with the standard hours, to calculate FTE (full-time equivalency).
FTE (full-time equivalency)	The percentage of full-time the employee should normally work in this job. The system calculates this value based on the standard hours entry for this job and the standard work period. However, you can override the system-calculated FTE and enter a new value less than 1.0.
Adds to FTE Actual Count? (adds to the full-time equivalency actual account)	Select this check box to include this employee's job when processing FTE edits for budgeting purposes.

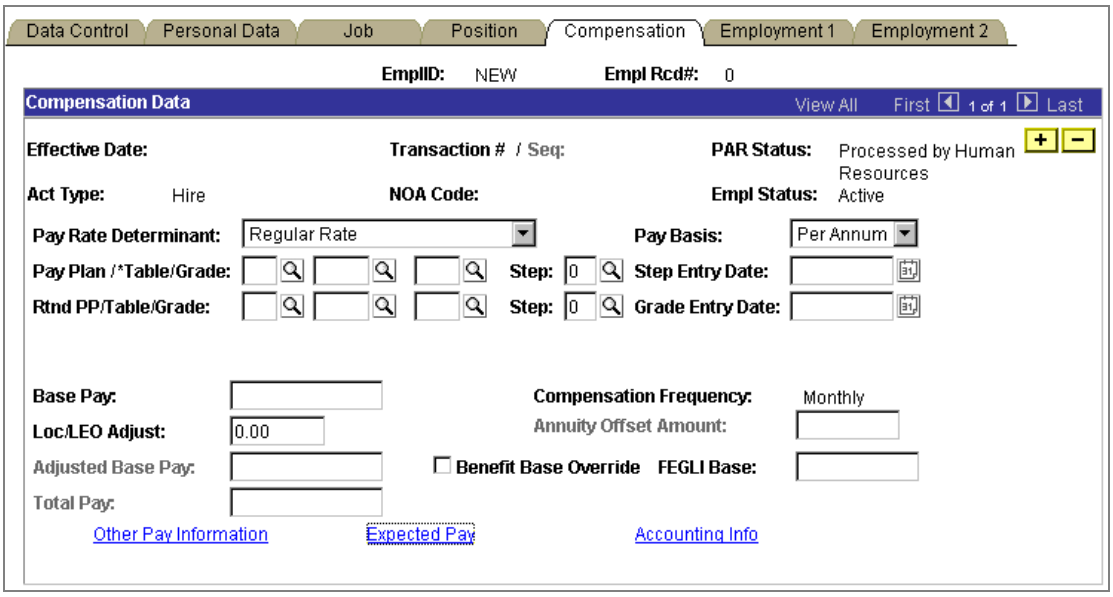
See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up and Using Frequencies," Defining Standard Hours and the Standard Work Period and Defining FTE

PeopleSoft Payroll for North America PeopleBook, Introducing PeopleSoft Payroll for North America

Entering Employee Compensation Information

Access the Compensation page.



Compensation page

Note. Multiple Components of Pay, Derivation of Rates, and related features are not currently supported in PeopleSoft Human Resources Management for U.S. Federal Government.

Many values on this page are set by default from values you entered in the Department and Job Code fields on the Job Data page. Override these values if necessary.

Pay Rate Determinant — Select a pay rate determinant.

Pay Plan/Table/Grade — Select the pay plan, table, and grade.

Step — Assign the correct step for the employee.

Note. For certain Pay Rate Determinants this is not an option and the field does not accept data.

Step Entry Date — The effective date of the request for this action.

If the Multi-Step/Grade check box is selected on the Installation table and you select a step on this page, the system automatically enters the base pay for that step.

Rtnd PP/Table/Grade (retained pay plan) — There are several instances where retained grade or pay is authorized based on prior federal experience within the employing agency or at another federal agency. After selecting the appropriate pay rate determinant (for example, Retained Grade-Diff Posn), you can enter information in this field.

Step/Grade Entry Date — Enter the step and the date the employee was first assigned to the grade and step.

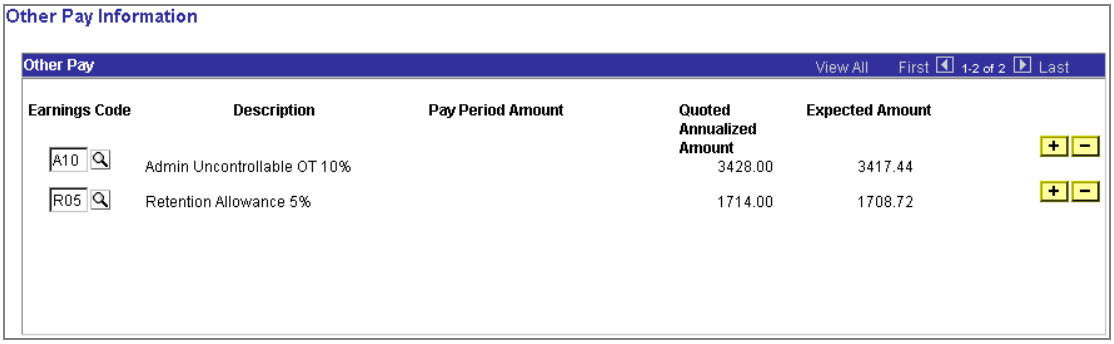
Compensation Frequency — Set by default from the Job Code page; override if necessary.

Base Pay	If you are using partial or full position management, a value is set by default here based on your prior assignment in the **Step** field. A GM pay plan position is the exception to this rule. Because the GM pay plan has no steps, you must enter the base pay amount. If you selected the Position Override check box on the Job page, you may also enter a base pay amount for a position with steps. This is appropriate in cases where the base pay amount is beyond the step 10 level. Enter the base pay amount based on the compensation frequency period indicated. For example, if the frequency period is one month, the base pay entered would be the pay earned for one month. The system calculates and displays the value in the **Loc/LEO Adjustment** (if appropriate) and **Total Pay** fields after you have provided the compensation data.
FEGLI Base	The system calculates the FEGLI base rate. Select the **Override** check box to override this default and then enter a new amount.
CSRS Annuity Offset Amount	If the employee is an annuitant, enter a CSRS annuity offset amount.
Adjusted Base Pay	The system calculates and displays the adjusted base pay by applying the Loc/LEO adjustments to the employee's base pay. This field is used for pay limits computation of the locality pay.

If you selected the Multi-currency check box on the Installation table and entered the base pay in a different currency from your base currency, the system converts the rates to the base currency and compares them with the ranges specified for this salary grade in the Salary Grade table. If the rates exceed the salary range, a warning message appears.

Entering Additional Compensation Information

Access the Compensation: Other Pay Information page.



Compensation: Other Pay Information page

Earnings Code Select the code for the additional pay type, such as automobile and beeper allowances. The system issues a warning indicating that the earnings code may be applicable to pay caps and pay limits, at which time the employee's earnings calculation within payroll may be reduced.

Pay Period Amount Enter the amount the employee receives each pay period for this type of pay. Options depend on the earnings code you enter.

Understanding Expected Pay and Quoted Pay Within PeopleSoft Human Resources Management for U.S. Federal Government

The difference between expected pay and quoted pay occurs as a result of the conversion factors used when comparing yearly and hourly pay rates on the Pay Plan page in the Pay Plan Table component and the Expected Pay Rate page.

Rather than using the hourly conversion factor of 2080, as is often used as a business calculation factor, the U.S. federal government uses 2087.

The Expected Pay page calculates the daily, biweekly, monthly, and annual rates using the base pay amount from the Compensation Data page. These figures are based on the hourly conversion factor you set for the pay plan on the Pay Plan table, typically 2087.

It also breaks out into separate columns the pay into base pay (no locality, no adjustments), pay with locality, and LEO pay. Total Other/Premium Pay is also calculated based on the amounts entered on the Other Pay Information page. So, as a result of using 2087 in these calculations, the estimated quoted pay on the Compensation Data page is slightly higher than what the federal employee actually receives in a year.

These two fields for expected and quoted pay may not match. The procedures that the federal government has for deannualizing and reannualizing quoted compensation rates are the cause of the difference. To deannualize a quoted rate of pay (convert to hourly), you divide the quoted rate of pay by 2087. To reannualize a quoted rate of pay to determine the expected pay, you multiply the derived hourly rate by the employee's scheduled weekly tour of duty and then multiply that by 52 weeks.

Following are two examples:

Example 1

Full-time employee (40 hours per week) with quoted rate of $41,740 per year.

Quoted rate = $41,740.

Hourly rate = quoted rate/2087 hours = $41,740/2087 hours = $20/hour.

Expected pay = hourly rate × standard weekly tour × 52 weeks = $20/hour × 40 hours/week × 52 weeks = $41,600.

Difference between quoted and expected pay on an annual basis = $140.

Example 2

Part-time Employee (20 hours per week) with quoted rate of $41,740 per year

Quoted rate = $41,740.

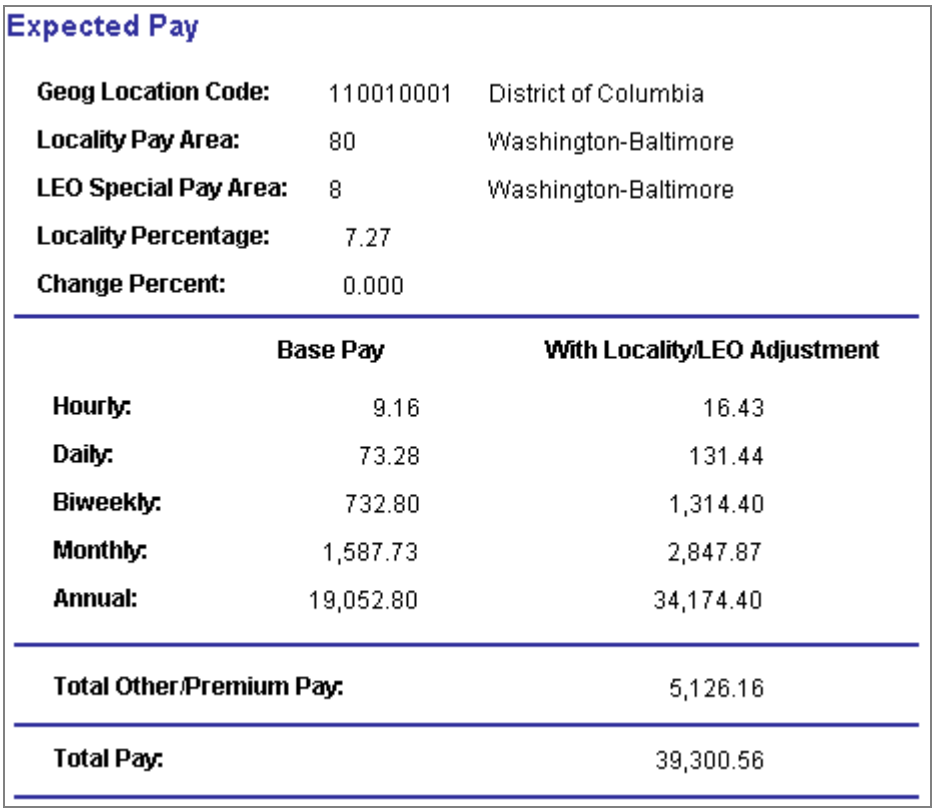
Hourly rate = quoted rate/2087 hours = $41,740/2087 hours = $20/hour.

Expected pay = hourly rate × standard weekly tour × 52 Weeks = $20/hour × 20 hours/week × 52 weeks = $20,800.

Difference between quoted and expected pay on an annual basis = $20,940.

Viewing Pay Rate and Compensation Calculations

Access the Compensation: Expected Pay page.



Expected Pay

Geog Location Code:	110010001	District of Columbia
Locality Pay Area:	80	Washington-Baltimore
LEO Special Pay Area:	8	Washington-Baltimore
Locality Percentage:	7.27	
Change Percent:	0.000	

	Base Pay	With Locality/LEO Adjustment
Hourly:	9.16	16.43
Daily:	73.28	131.44
Biweekly:	732.80	1,314.40
Monthly:	1,587.73	2,847.87
Annual:	19,052.80	34,174.40
Total Other/Premium Pay:		5,126.16
Total Pay:		39,300.56

Compensation: Expected Pay page

The **Change Percent** field displays information regarding a percent change when new rows are inserted that change the base salary amounts.

Based on the base pay and compensation frequency you enter, the system calculates and displays the hourly, daily, biweekly, monthly, and annual rates for this employee. It also calculates those same figures using the locality/LEO adjustment listed at the top of the page.

The total other/premium pay is the total of annual expected pay for the items you entered on the Other Pay Information page. The system calculates total pay by summing the annual pay with the locality/LEO adjustment and the total other/premium pay contributions.

Note. The **Rate Change Amount** and **Rate Change Percent** fields are used when awarding increases (not for new hires).

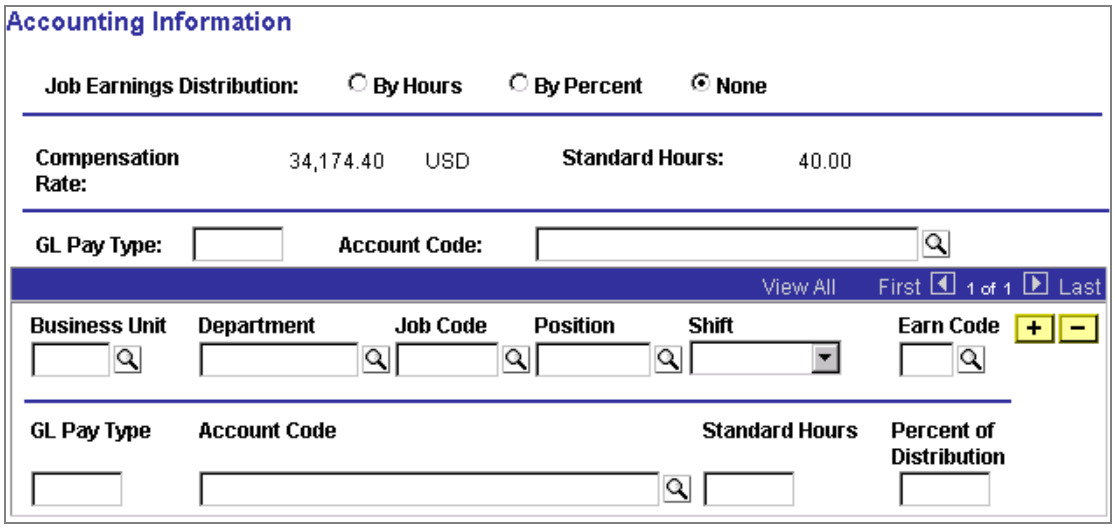
See Also

PeopleSoft Human Resources PeopleBook: Base Benefits, "Introduction to PeopleSoft Base Benefits"

"USF Processing Personnel Action Requests"

Viewing Job Earnings Distributions

Access the Compensation: Accounting Information page.



Compensation: Accounting Information page

Job Earnings Distribution Select the appropriate option to indicate the job earnings distribution frequency by hours, by percent, or not at all.

When you select the **By Hours** or **By Percent** options, the **GL Pay Type** and **Account Code** fields are unavailable for entry. Use the scroll bar to distribute earnings among departments.

If you select the **By Hours** option, then enter the hours to be distributed to each department in the **Hours** field corresponding to each department entered.

If you select the **By Percent** option, enter a percentage corresponding to each department in the **Percent** field. Percentages must total 100 hours and must equal the value in the **Standard Hours** field.

Compensation Rate The annual salary, including the locality and LEO adjustments.

Standard Hours Set by default from the Job Code page.

GL Pay Type Enter the GL pay type that has been established by your agency.

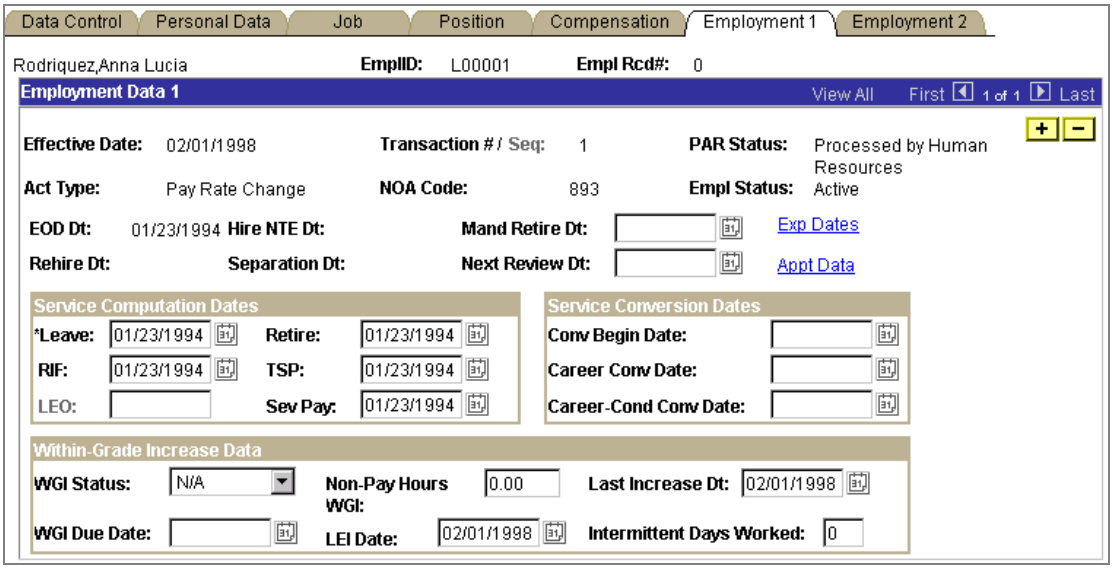
Account Code Indicate the type of account to which the earnings will be charged.

Business Unit, Department, Job Code, Position, and **Shift** Select the business unit, department, job code, position, and shift to which to charge the earnings.

Earn Code (earnings code)	Specify the earnings code.
Hours	If you select the **By Hours** option, then specify how many hours will be charged to the corresponding earnings code.
Percent	If you select the **By Percent** option, then specify what percent will be charged to the corresponding earnings code.
Percent of Distribution	Enter the percent to be charged to the corresponding earnings code.

Entering Current and Historical Employment Information

Access the Employment 1 page.



Employment 1 page

Many values on this page are set by default from values entered in the Department and Job Code fields on the Job Data page. When hiring a new employee, the system populates most of the dates on this page with the effective date of the hire action. These dates are used later in various ways to calculate the employee's service time. Override values as necessary.

The Hire field is If at a later date you change the status of an employee's employment, depending on the administrative action you select in the Job Data pages, the system will display the rehire date.

The **Separation Date** field is display-only, and shows the date that the employee left employment.

EOD Dt (entered on duty)	Reflects the effective date of the hire request after you save the request. This date is distinct from the SCD dates in that it describes when the employee started federal employment with the employing agency; it does not reflect total federal service involving the employee's total career.
Hire NTE Dt (not to exceed date)	Set by default from the Not to Exceed Date field on the Data Control page. In the case of a temporary hire, it designates the length of time the temporary employment can last.
Mand Retire Date (mandatory retirement date)	If applicable, enter the employee's mandatory retirement date.
Next Review Dt (next review date)	Enter the next review date. This date, while informational only, can serve as a tickler date for employee performance review.

Service Computation Dates

Leave	The service computation date for beginning the employee's leave computation.
Retire	The service computation date for beginning the employee's retirement computation.
RIF (reduction in force)	The computation date for establishing the employee's RIF position.
TSP (thrift savings plan)	The computation date for beginning the employee's thrift savings plan eligibility computation.
LEO (law enforcement officer)	The computation date for beginning the employee's law enforcement officer retirement computation.
Sev Pay (severance pay)	The service computation date for establishing the employee's severance pay computation.

Service Conversion Dates

Conv Begin Date, Career Conv Date (career conversion date), **Career Cond Conv Date** (career-conditional conversion date)	Enter the conversion begin date, the career conversion date, and the career-conditional conversion date. If the employee is hired using a career-conditional appointment, the conversion begin date is the effective date of the hire. Upon completion of the three-year period, the personnel office processes a PAR converting the employee to a career appointment and enters that effective date in the **Career Conv Date** field. If the employee was hired under a temporary appointment, the conversion begin date is the effective date of the hire. When the personnel office processes a PAR to convert the temporary employee to a permanent employee with a conversion to career

conditional competitive appointment, the **Career-Cond Conv Dt** field is the effective date for that transaction.

Within-Grade Increase Data

WGI Status (within-grade increase)

Enter the WGI status, such as ***(none), Approved, Waiting, Denied, N/A,*** or ***Postponed.*** For a new employee, the default value is ***Waiting.*** ***Created*** is an option for WIGI status, which is reserved for the automatic WIGI process. Do not change this online, as the WIGI process won't select it unless the status is ***Waiting*** or ***Approved.***

Non Pay Hours WGI, Intermittent Days Worked

Leave these informational fields blank.

Last Increase Dt (last increase date), **LEI Date** (last equivalent increase date), **WGI Due Date**

The system automatically enters the last increase date, LEI date, and WGI due date. For certain actions, the **WGI Due Date** field is set by default to the pay period begin date based on the Pay Calendar tables that your organization has established. For WGI due date calculation, it is imperative that you set up your pay calendars for this year, plus three years in advance of the current year. For example, if the current year is 1999, then your Pay Calendars need to be set up for 1999, 2000, 2001, and 2002.

If you enter a date that isn't the beginning of a pay calendar, the system displays a message suggesting valid pay calendar begin dates into which your date falls. If the system suggests a date of January 1, 1899, this indicates that your pay calendars do not exist. See your Implementation project manager about creating additional pay calendars.

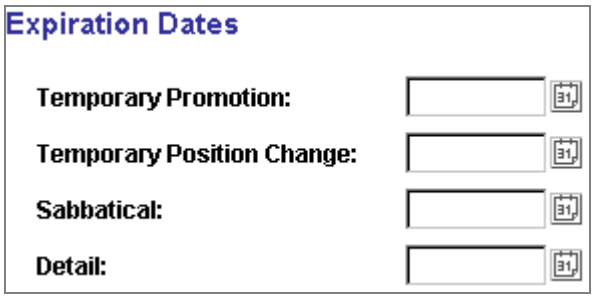
See Also

"USF Processing Automatic Actions for Probation, Tenure, and Within-Grade Increases"

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Using Calendars"

Entering Position Expiration Dates

Access the Employment 1: Expiration Dates page.



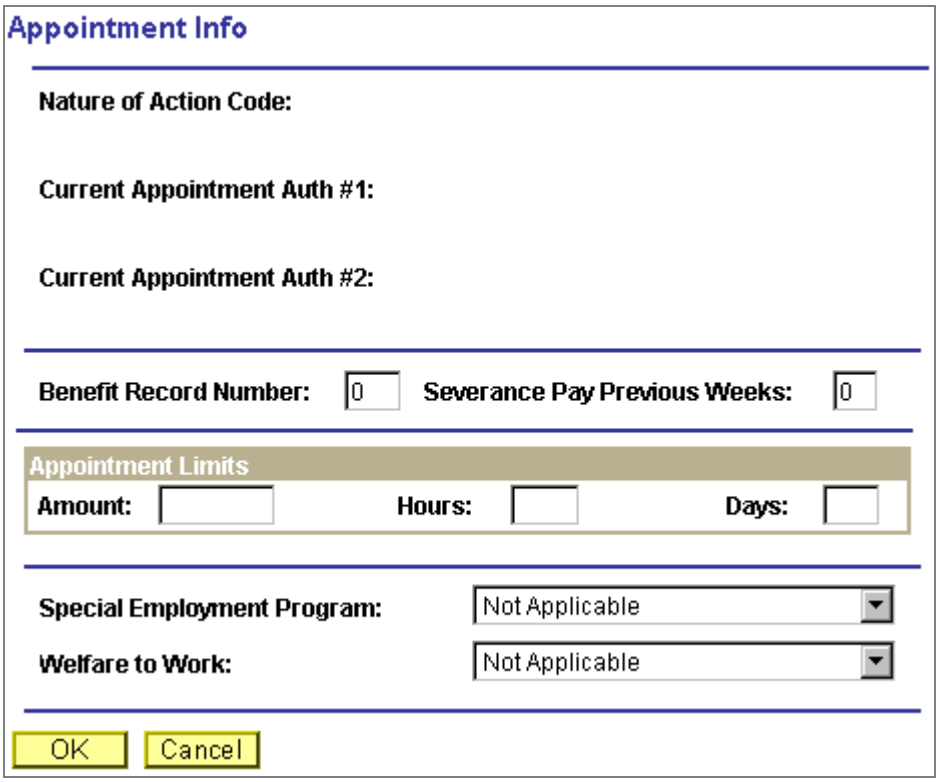
Employment 1: Expiration Dates page

The following fields, which are updated by the user, are informational only.

Temporary Promotion	Enter the temporary promotion date.
Temporary Position Change	Enter the temporary position change expiration date.
Sabbatical	Enter the sabbatical expiration date.
Detail	Enter the detail assignment expiration date.
Appt Data (appointment data)	Click this link to view appointment information details or to specify other benefits or appointment data.

Entering Appointment Limits

Access the Employment 1: Appointment Info page.



Employment 1: Appointment Info page

Nature of Action Code, Current Appointment Auth #1, (current appointment authorize #1) **Current Appointment Auth #2** (current appointment authorize #2)

CPDF reportable fields maintained to reflect historic data on the employee's current appointment authority used to authorize the employee's hire.

Benefit Record Number, Severance Pay Previous Weeks

For a new hire, you do not need to enter the benefit record number and the number of severance pay previous weeks. If changes occur to the employee's employment status, you must update these fields (for example, RIF).

Special Employment Program

Indicate the special employment program: ***Not Applicable, Other, Presidential Management Intern, SES Candidate Development,*** or ***Veteran's Readjustment Program.***

Welfare to Work

Select the value that describes whether the employee is hired under a U.S. government-specified Welfare to Work Program:

Hire not Welfare to Work Prog

Not Applicable

Welfare to Work Program Hire

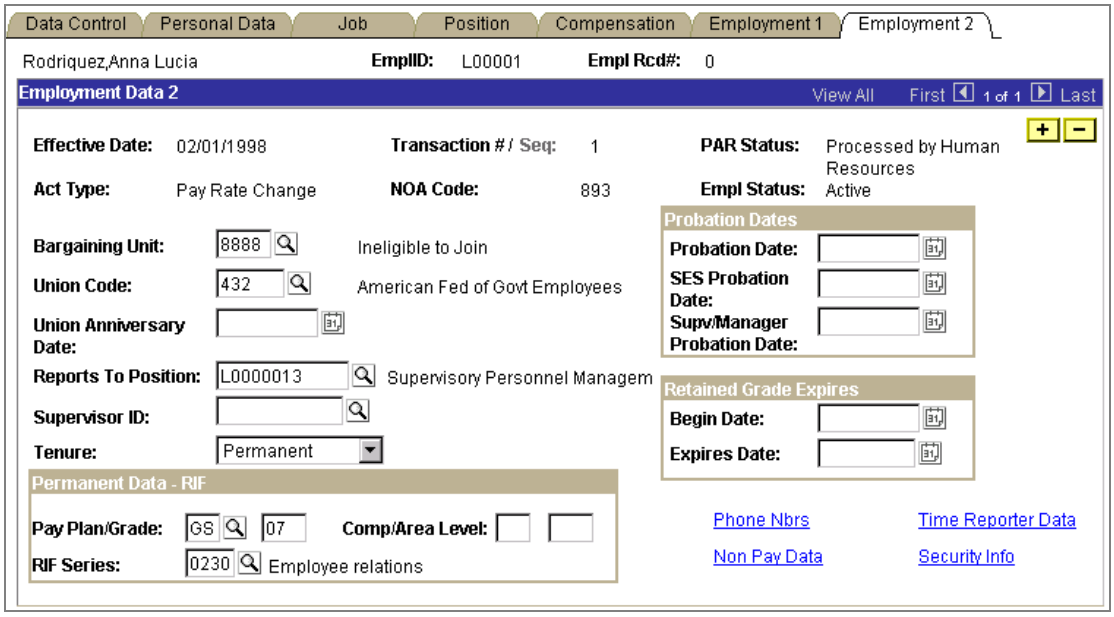
The system creates a NOA 050 or 060 transaction record based on the value you select. You do not have to create a separate PAR row for NOA 050 or 060 to report Welfare to Work employees to OPM. At hire, if the employee is employed under the Welfare to Work program, indicate which program is applicable to the employee on the hire action itself.

Appointment Limits

Amount, Hours, Days Depending on the type of appointment used to hire the employee, enter the appointment limits amount, hours, or days.

Entering Additional Employment Information

Access the Employment 2 page.



Employment 2 page

Union Code If your new employee belongs to a union, select the appropriate union code.

Bargaining Unit Select a code representing the bargaining unit to which the employee belongs.

Union Anniversary Date If the bargaining unit covers the position and the employee has elected to join, enter the date on which the employee's seniority ranking within the union is based.

Reports To Position, Supervisor ID Set by default from the Position Data page (if the agency has the Position Management option activated).

Tenure	Indicate the type of tenure.

Probation Dates

Probation Date, SES Probation Date (Senior Executive Service probation date), **Supervisor/Manager Probation Date**	Enter the applicable probation date, probation, or supervisor/manager probation date. There are different time frames associated with each probation date based on different regulatory requirements.

Retained Grade Expires

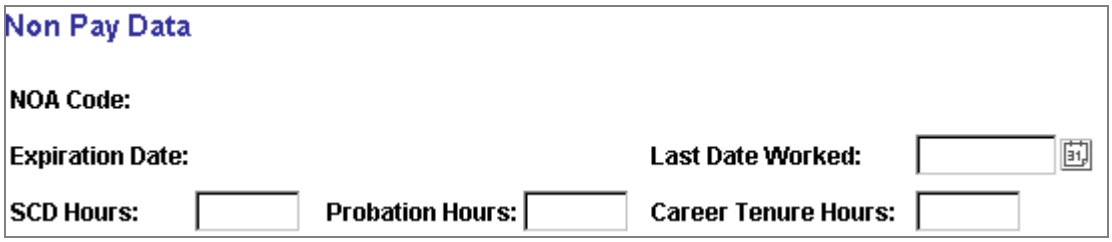
Begin Date, Expires Date	Where appropriate, enter the employee's retained grade begin date and expires date. These are informational fields provided for the agency to track the employee's eligibility to maintain retained grade.
Permanent Data-RIF	These informational fields enable the agency to track the employee relative to RIF processing.
Pay Plan/Grade	Enter the employee's pay plan and pay grade.
Comp/Area Level	Enter the employee's compensation area and level.
RIF Series	Select the employee's RIF series.
Phone Nbrs (phone numbers)	Click this link to move to the Employment Phone Numbers page to enter phone numbers for the employee.
Non Pay Data	Click this link to enter information related to a status of non-pay.
Security Info (security information)	Click this link to enter information related to the employee's security clearance.
Time Reporter Data	Click this link to review PeopleSoft Time and Labor data for this employee. If you aren't using PeopleSoft Time and Labor, the link is unavailable.

See Also

"USF Processing Personnel Action Requests"

Tracking Nonpay Status Information

Access the Employment 2: Non Pay Data page.

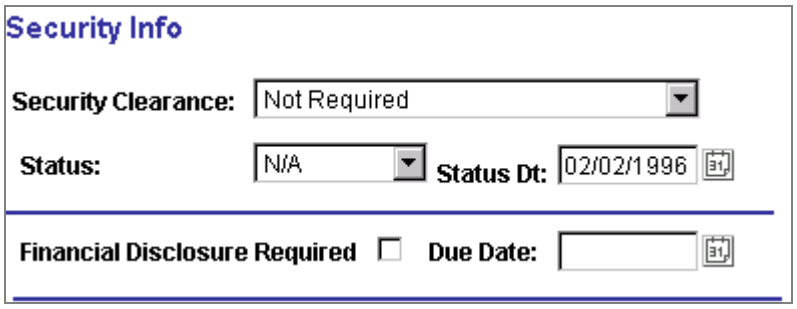


Employment 2: Non Pay Data page

Expiration Date	The nonpay expiration effective date, which reflects the projected expiration of nonpay status and consequent processing of a PAR to return to pay status.
Last Date Worked	The date last worked prior to being placed in a nonpay status.
NOA Code	Indicates the PAR processed to place the employee in a nonpay status.
SCD Hours, Probation Hours, Career Tenure Hours, Last Date Worked	Enter and track SCD hours, probation hours, career tenure hours, and the last day worked in these informational fields.

Entering Employee Security and Financial Disclosure Information

Access the Employment 2: Security Info page.



Employment 2: Security Info page

Security Clearance	If the employee has received a security clearance, enter the level of security clearance or select ***Not Required*** to indicate that clearance isn't required.
Status, Status Dt (status date)	Enter the status and status date.
Financial Disclosure Required and **Due Date**	If a financial disclosure is required, select this check box, and enter the due date for receipt.

See Also

PeopleSoft Human Resources PeopleBook: Manage Positions, "Setting Up Positions" USF Setting Up Position Title Codes and Creating Positions

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Jobs," Classifying Jobs

Understanding Default Values for Employment Data

After you enter job and position data, pay information is populated by default on the Compensation Data page. If you associated pay plans with job codes, the Pay Plan field is populated by default from the data in the Job Code table. The Grade field is populated by default from the Job Code page. After the values in the Pay Plan and Grade fields appear, the system also displays the Grade Entry Date field, which is the date the employee first joined the grade. When a value is entered in the Step field, the value in the Step Entry Date field populates by default. You can override these values if you choose.

The system verifies any combinations of pay plans and grades that you select. If the combination doesn't exist, a warning message appears.

See Also

PeopleSoft Human Resources PeopleBook: Plan Salaries, "Setting Up Salary Plans, Grades, and Steps"

PeopleSoft Human Resources PeopleBook: Manage Positions, "Maximizing Position Data" Maintaining Your Organizational Structure

Entering Education Information

To enter information on the employee's education, use the Manage Competencies (USF), Education page.

When you save the Hire component, the system returns the Manage Competencies (USF), Education page for you to complete. After you have completed the page, the save process for the Hire pages continues.

See Also

PeopleSoft Human Resources PeopleBook: Manage Positions, "Managing Position Data" Entering Employee Accomplishments

Assigning Employees to Positions

If you organizing part or all of PeopleSoft Human Resources by position (using PeopleSoft Position Management), you can hire some or all new employees into positions on the Hire pages, accessed from the Administer Workforce (USF), Hire menu. If you're not using PeopleSoft Position Management, you can also use position numbers but the system won't process position-related data.

Hiring Employees Into Positions

When you assign an employee to a position, many fields on the Hire pages are set by default from the Position Data page. So when you display the Job page, do not select any values in the fields before you assign the position number.

After you've selected the hire action, then select a position number. (You define positions on the Position Data pages.)

When you move out of the Position Number field on the Job page, the system completes the position-related fields with default data from the Position Data pages. These fields include Job Code, Agency, Sub-agency, Department, and Location, which are unavailable for entry. The system completes the Effective Date field using data from the Data Control page.

PeopleSoft Human Resources issues a warning message if you assign an employee to a position that has already been filled by another employee and if a new employee appointment exceeds the maximum head count for that position. The system calculates the current head count and shows the appropriate indicator for open/filled on the Position Data 2 page. The system does this when you change employee assignments.

You may need to enter exceptions to the default position data for this employee. For example, the employee may be located in a different location than the standard location associated with the position. To override the position defaults, select the Position Override option. This causes fields previously unavailable for entry, including the Job Code, Agency, Location, and Department fields to become available. You can then enter exceptions in these fields.

Note. If you override the defaults for position-related data, you must maintain the employee data manually. The system won't update position data automatically again until you clear the Position Override option.

The Position Management Record check box is unavailable. The system uses this check box to indicate that it has automatically inserted a data row in the Job Data pages due to changes you've made to fields in the Position Data pages that overlap with fields here.

See Also

PeopleSoft Human Resources PeopleBook: Manage Positions, "Setting Up Positions"

Hiring Job Applicants

Use the Recruiting Your Workforce module to track information about people who apply for jobs with your organization. This module includes a component called Hire Applicant that is designed especially for hiring job applicants. When you use this component to hire an applicant, the information you've already entered in the system automatically becomes part of the employee's record.

Assign employee IDs to applicants in a slightly different way from new hires. All other fields on these pages are documented earlier in this chapter.

Note. If you're using the Recruit Workforce business process in PeopleSoft Human Resources and hiring an applicant, the system completes the referral source with the information you've already entered for that applicant.

See Also

PeopleSoft Human Resources PeopleBook: Recruit Workforce, "Hiring Applicants"

Adding Concurrent Jobs

If your organization allows employees to hold more than one job, use the Add Concurrent Job component in Administer Workforce to enter new jobs for employees who already have one or more jobs. The component consists of the Job Data, Employment Data, Earnings Distribution, and Benefits Program Participation components.

Setting Up Multiple Jobs

Before you can add multiple jobs for your workforce, you must select the Multiple Jobs Allowed option in PeopleTools and update the user security so that users have access to the menu options they'll need.

If an employee has more than one job, you may want to designate one job as primary and others as secondary. The primary job designation is used for government reporting.

See Also

"Hiring Your Workforce"

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Multiple Jobs"

CHAPTER 7

Entering Additional Data in Human Resources Records

This chapter discusses the entry and tracking of additional Human Resources data and shows you how to:

- Locate personnel records.
- Set up and track employment contracts.
- Set up and track temporary assignments.
- Track disabilities.
- Handle company credit cards and property.
- Track dependent/beneficiary identification data.
- Enter and track additional employee data.

Understanding Additional Employee Data

Once you've entered a person's basic personal, job, and employment data into your human resources system, use other pages in the Administer Workforce menus to add and track a broad range of other information for that person. Enter all of this information for both employees and non-employees.

While many of the pages covered in this chapter are optional, you may find them useful for tracking and reporting, and for maintaining compliance with government regulations. You can also provide other people, such as your employees or industrial relations representatives, with information that helps them perform their jobs more effectively.

Locating Personnel Records

The first time you open an additional information page, the system displays the Update/Display page for you to select the person for whom you're adding data. If you don't know the person's employee ID, use the page to search for the correct record by name, partial last name, alternate character name, department, setID, or employment status. Also use the Search by National ID page to find a person's record using a national ID.

When you move to a new page, the system assumes you want to keep working on the same person's record. It automatically displays that person's information on the new page. To change to a different person's record, select the Cancel button to clear the current data, then choose a page. The system once again prompts you to choose the person you want.

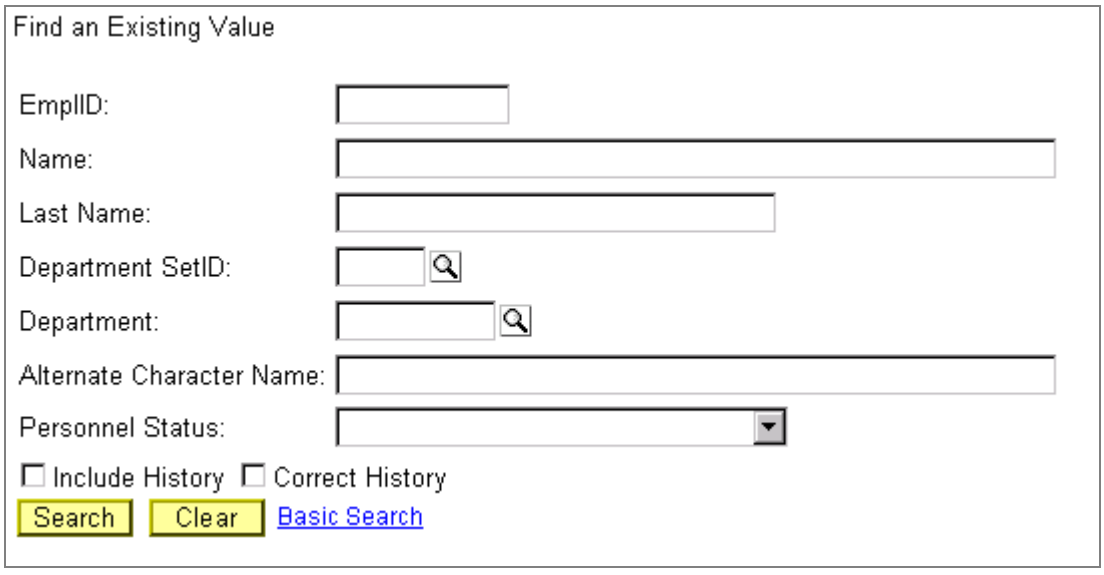
Page Used to Local Personnel Records

Page Name	*Object Name*	*Navigation*	*Usage*
Search by National ID	NID_LOOKUP	Administer Workforce, Administer Workforce (GBL), Inquire, Search by National ID, Search by National ID	Locate a person's records using their national ID. Once you find the person's employee ID, use it when you move to other search pages.

Searching for Employee Information

You'll use the following search dialog box to find an employee's information. You'll encounter this dialog box when you enter most pages in the **Administer Workforce (GBL), Use** or **Administer Workforce (USF), Use** menus.

You must have already created employee records in PeopleSoft Human Resources. In other words, you must have already hired or added the person as an employee or a non-employee.



Searching for employee information

Last Name If you're not sure of the entire employee ID or name, make a partial entry in the **Last Name** field and click **OK** to search for the correct name and ID.

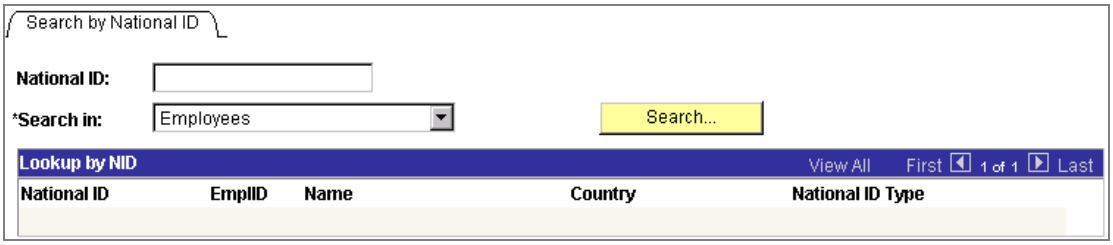
	You cannot use this field to search for last names using special characters, such as double byte Japanese characters.
Department SetID	Select a setID here and a department in the next field to narrow the search to employees in a particular department.
Department	Select a department to narrow the search to employees in that department. You must also select a setID in the previous field.
Alternate Character Name	If you turned on the Alternate Character feature for your user ID on the Primary Permission List Preferences Table, you can also search for employee names using the Alternate Character search feature in PeopleSoft Human Resources.
Personnel Status	Use this field to narrow the search to employees only or nonemployees only. Select ***None*** (default), ***Employee,*** or ***Non-Employee.***

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Regulating HRMS System Data" and "Working With Languages" Working With Double-Byte Characters

Searching by National ID

Access the Search by National ID page.



Search by National ID page

National ID	Enter the **National ID** of the person whose records you want to view.
Search In	Select ***Employees*** or ***Dependents and Beneficiaries*** to narrow your search.

After you click the **Search** button, the system displays a list of the records that match the ID you entered.

Setting Up and Tracking Employment Contracts

Many organizations maintain contracts or other written agreements with their employees and contractors. Use three pages to set up standard employment contracts for your organization.

The Contract Data pages are also located in the Recruit Workforce menus to help you record contract details for job applicants. When you hire an applicant using the Applicant Hire feature, the contract information carries over to the applicant's new employment record automatically, along with other relevant data.

See Also:

PeopleSoft Payroll for North America PeopleBook, "Preparing Your Payroll Process," Administering Contract Pay

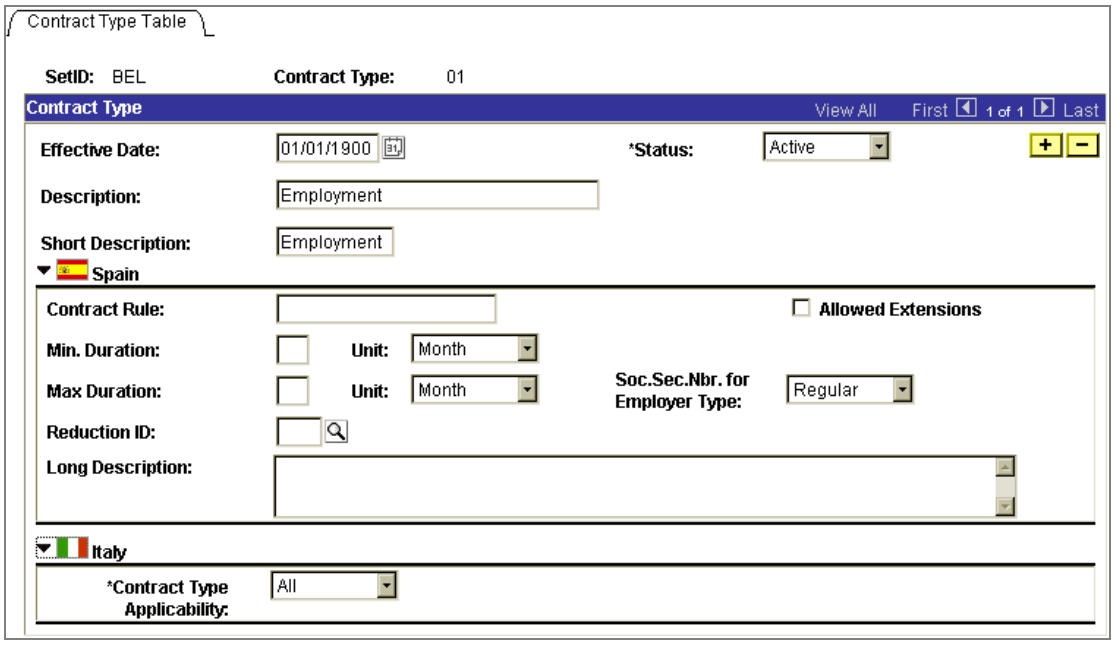
Pages Used to Set Up and Track Employment Contracts

Page Name	*Object Name*	*Navigation*	*Usage*
Contract Type Table	CONTRACT_TYPE_TBL	Administer Workforce, Administer Workforce (GBL), Setup, Contract Type Table Administer Workforce, Administer Workforce (USF), Setup, Contract Type Table Administer Workforce, Administer Workforce (FPS), Setup, Contract Type Table	Define the different types of contracts that your enterprise administers.
Contract Clause Table	CNT_CLAUSE_TABLE	Administer Workforce, Administer Workforce (GBL), Setup, Contract Clause Table, Contract Clause Table Administer Workforce, Administer Workforce (FPS), Setup, Contract Clause Table	Define special languages and riders that can be added to the main body of an employment contract.

Page Name	*Object Name*	*Navigation*	*Usage*
Contract Template Table	CNT_TEMPLATE_TABLE	Administer Workforce, Administer Workforce (GBL), Setup, Contract Template Table, Contract Template Table Administer Workforce, Administer Workforce (FPS), Setup, Contract Template Table	Set up and store all of your organization's standard employment contracts. Use the information that you define here when you assign particular contracts to employees and temporary workers in your organization. You must have previously set up the Contract Type.
Contract Status/Content	CONTRACT1	Administer Workforce, Administer Workforce (GBL), Use, Contract Data, Contract Status/Content Administer Workforce, Administer Workforce (FPS), Use, Contract Data, Contract Status/Content	Add or update basic information about the contract between your organization and an employee, including the contract duration, type, and content. You must have previously set up contract template ID's on the Contract Template Table page.
Contract Type/Clauses	CONTRACT2	Administer Workforce, Administer Workforce (GBL), Use, Contract Data, Contract Type/Clauses Administer Workforce, Administer Workforce (FPS), Use, Contract Data, Contract Type/Clauses	Update or add any special contract clause information to the standard contract language for this employee.
Signature Date/Probation Info	CONTRACT3	Administer Workforce, Administer Workforce (GBL), Use, Contract Data, Signature Date/Probation Info Administer Workforce, Administer Workforce (FPS), Use, Contract Data, Signature Date/Probation Info	View basic employee job data and to designate the individual in your organization who is responsible for maintaining the employee's contract information, the signature date, and so on.

Defining Different Types of Contracts

Access the Contract Type Table setup page.



Contract Type Table page

(ESP) Spain

Contract Rule

Enter the number of the law that governs this kind of contract. A typical law number includes the type of law, law number, and year. For example, RD 3290/1997 or Ley 22/1995

The system doesn't edit your entry.

Allowed Extensions

Select to permit extensions to be added to this type of contract.

Min. Duration (Minimum Duration)

Use this field with the **Unit** field to specify the minimum length allowed for this type of contract. Enter a quantity in this field and use the **Unit** field to select a unit of time. For example, if the minimum contract duration is six months, enter ***6*** in this field, then select ***Months*** from the available options in the **Unit** field.

Unit

See the **Minimum Duration** field description for help in completing this field. Values are ***none, Day, Hour, Month, Week,*** or ***Year.***

Max Duration (Maximum Duration)

Use this field with the **Unit** field to specify the maximum length allowed for this type of contraction. See the **Minimum Duration** field description.

Soc. Sec. Nbr. For Employer Type (social security number for employer type)

Select a Social Security Number type from the available options: ***none, Part Time, Regular,*** and ***Training.***

Reduction ID

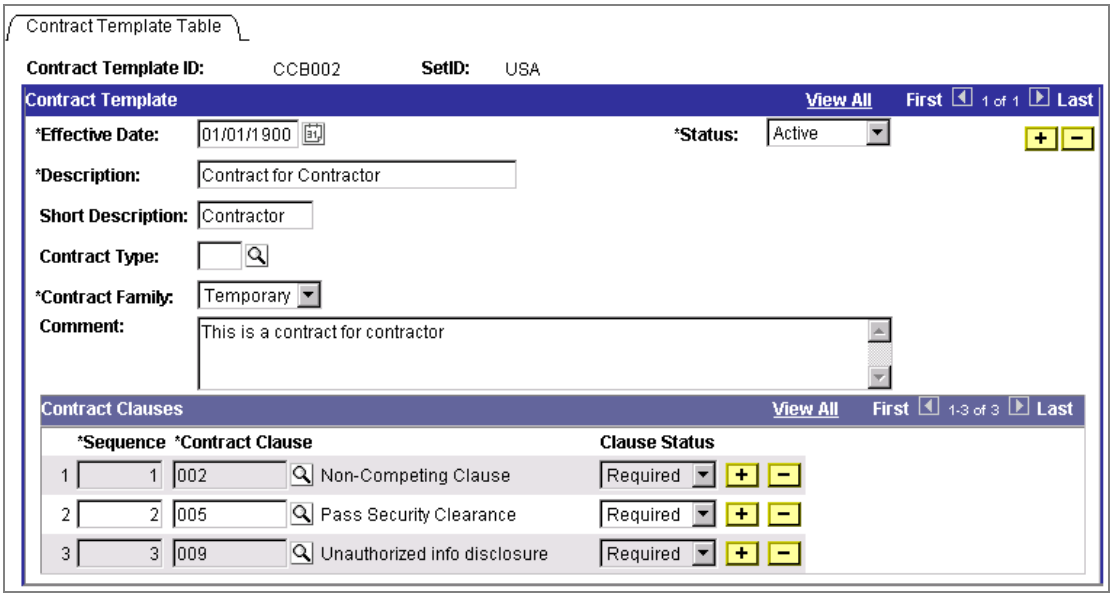
This field is active only if PeopleSoft Global Payroll for Spain is installed. Select the reduction ID that corresponds to the contract type. The reduction ID identifies the specific reduction definition/rule that applies to an employer. In certain limited cases—such as when a company hires employees with disabilities, or hires workers older than 45 years of age—the employer may qualify for a reduction in the amount of their social security contributions.

See Also

PeopleSoft Global Payroll for Spain PeopleBook, "Setting Up Social Security Contributions," Viewing Reduction Data

Setting Up and Storing Standard Contracts

Access the Contract Template Table setup page.



Contract Template Table page

Contract Type

Indicate whether the contract type for this template is ***Limited*** or ***Unlimited.***

Contract Family

Enables you to group a class of contracts. For example, you may have one contract family for regular employee contracts and another for temporary employee contracts.

Tying contracts to a contract family helps you narrow your search criteria when you select a contract template.

Contract Clauses

Use the **Contract Clauses** group box to define any special contract clauses that should be attached as riders to this contract template.

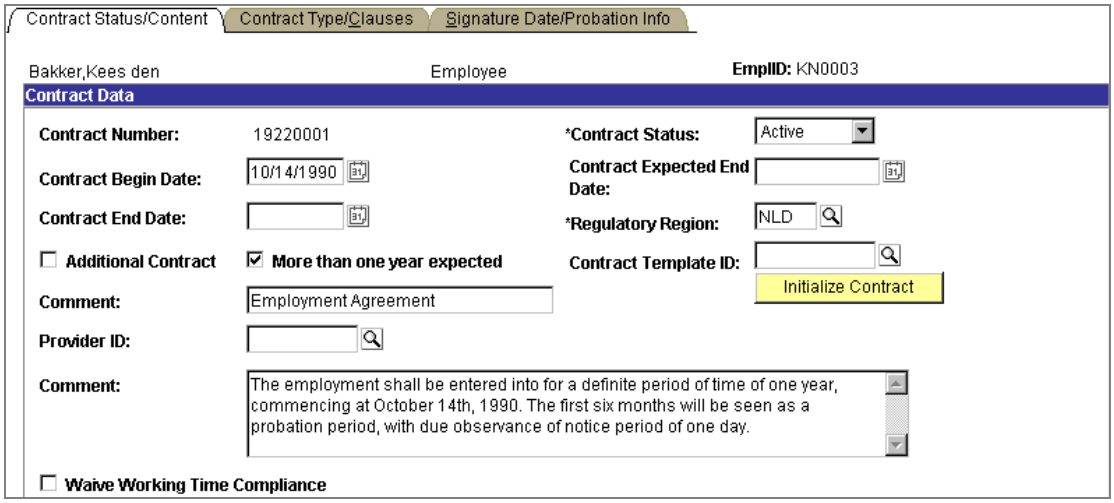
Sequence — The order in which to add the contract clauses to the contract.

Contract Clause — Select a contract clause from among those you've defined in the Contract Clause table. For example, a contract for a limousine driver requires that the employee have a driver's license.

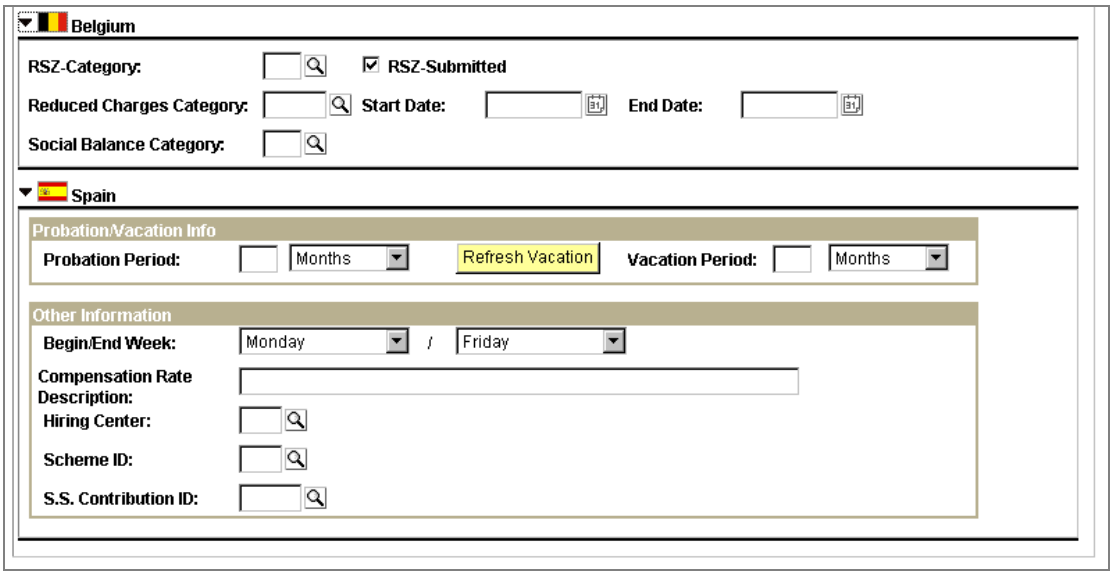
Clause Status — Indicate if the clause status of the clause is ***Optional*** or ***Required.***

Adding Basic Contract Information

Access the Contract Status/Content page.



Contract Data - Contract Status/Content page (1 of 2)



Contract Data - Contract Status/Content page (2 of 2)

Contract Template ID — If you have defined a template for the contract, select an ID from among the list of valid templates stored on the Contract Template Table Setup page, and click the **Initialize Contract** button.

Contract Status — Indicate whether the contract is ***Active*** or ***Inactive.***

Contract Begin Date — Enter the date when the contract begins. The current date is the default.

Contract End Date — Enter the date when the contract actually ended. This may differ from the date you expect the contract to end.

Contract Expected End Date — Enter the date when you expect the contract will end.

Additional Contract — Select this check box if the employee already has at least one employment contract. Leave blank if this is the employee's only contract.

More than one year expected — Select this check box if you expect that this contract will result in more than one year of employment for this worker.

Note. This check box is required for contracts with Japanese employees.

Provider ID — If this contract is with a nonemployee, specify the person's provider, agency, or employer.

Contract Content — If you entered a **Contract Template** code and clicked the **Initialize Contract** button, the system automatically completes this field. Otherwise, enter the contract language.

Regulatory Region — Enter a regulatory region.

(BEL) Belgium

RSZ Category If you're entering an employment contract and you selected *Employment* as the Contract Type on the Employment Terms Type page, choose an **RSZ Category** from among valid RSZ category codes stored on the BEL RSZ Category Table Setup page (CNT_RSZ_TBL_BEL).

RSZ Submitted Select this check box to indicate that social insurance premiums need to be paid by the employer to the Belgian RSZ governing body for this job contract.

Reduced Charges Category Select from among the categories, if appropriate.

Employers can lower their RSZ premium contributions if they are offering a job for one of these two reduced charges categories. Companies who employ workers who qualify for the reduced charges category enjoy lower employee costs.

Social Balance Category Select the appropriate Social Balance category. This information goes on the BEL Social Report.

(ESP) Spain

Probation Period If this employee's contract includes a probation period, use these two fields to specify how long it will be. Use the first field to enter the appropriate quantity and the second field to select a unit of time. Units of time are ***none, Days, Months,*** or ***Years.*** For example, if the probation period is six months, enter ***6*** in the first field, then select ***Months*** from the options in the second field.

Refresh Vacation Click this button to enter the default value for vacation periods from the Labor Agreement page in the Vacation Period field.

Vacation Period Use these two fields to specify how much vacation the employee will receive per year. Use the first field to enter the appropriate quantity and the second field to select a unit of time. Units of time are ***none, Months, Natrl Days (natural days), Weeks,*** or ***Work Days.*** For example, if the vacation period is 20 work days, enter ***20*** in the first field, then select ***Work Days*** from the options in the second field.

Begin/End Week Specify the days when the employee's work week begins and ends. The default values are ***Monday*** and ***Friday.***

Compensation Rate Description Enter a free-form description of the employee's compensation rate.

Hiring Center Select the hiring center responsible for hiring this person.

Scheme ID Select a scheme ID.

S.S. Contribution ID (social security contribution ID) — Select a social security contribution ID for the contract and the scheme ID selected. The system uses both the scheme ID and the contribution ID for social security calculations, to determine the percentage or fixed amount that is applied to the calculation of an employee's contribution.

Employment Contracts for Disabled Spanish Employees

If a Spanish employer hires a disabled person, the employment contract must be in writing. Once you hire a disabled person, you must keep the disabled worker for a minimum of three years. The disabled person has the right to work reduced hours for pro rata less pay.

See Also

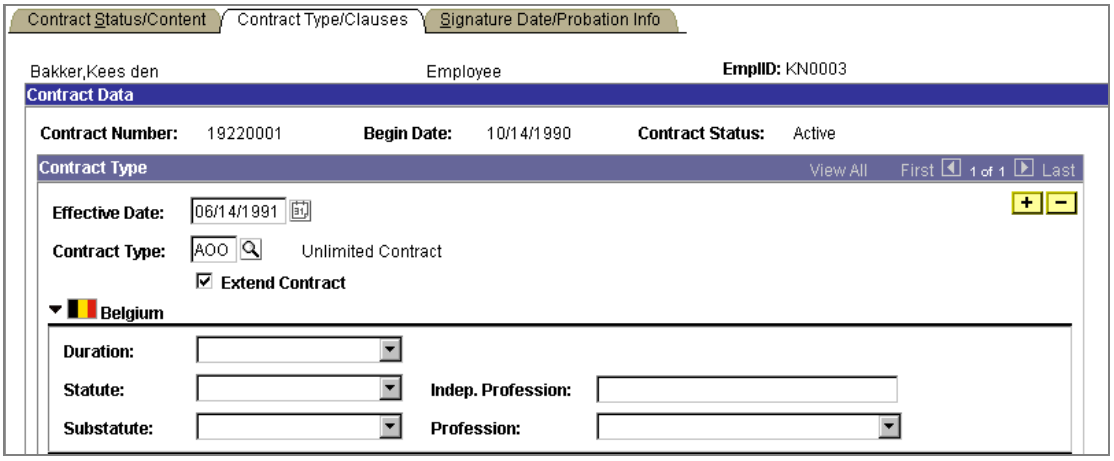
"Hiring Your Workforce," Adding Nonemployees and Job Applicants

"Setting Up the Country-Specific Tables," (ESP) Defining Social Security Scheme Information

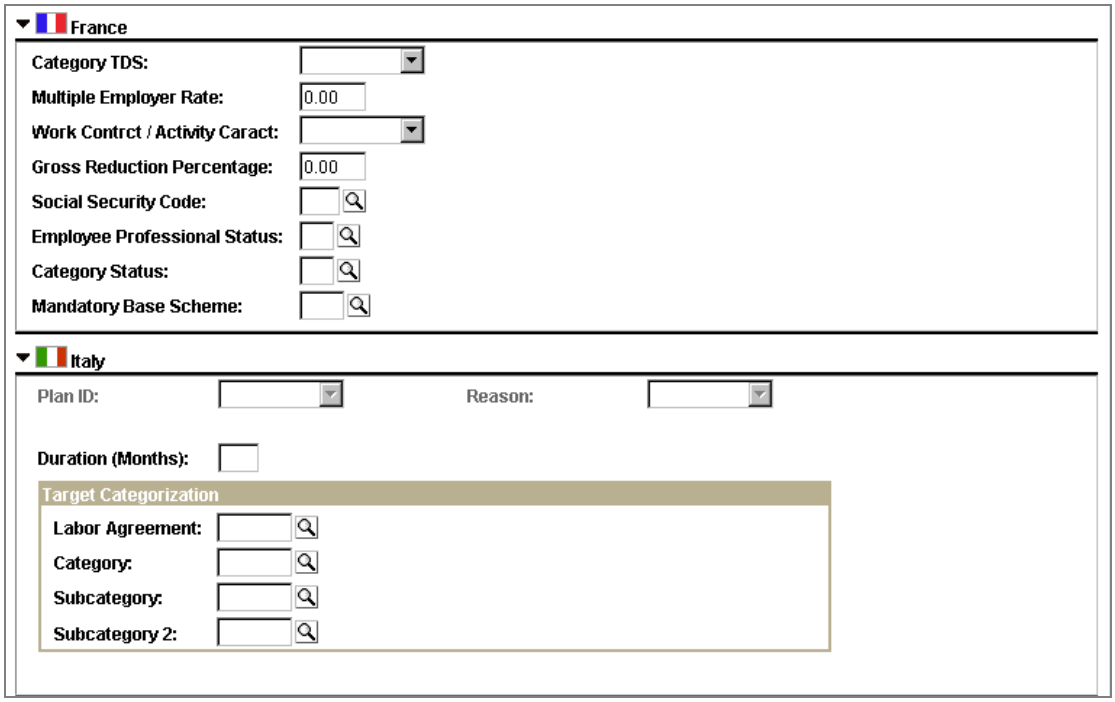
"Setting Up the Administer Workforce Business Process," Defining Labor Agreements and Employee Categories and Classes

Adding Special Contract Clause Information

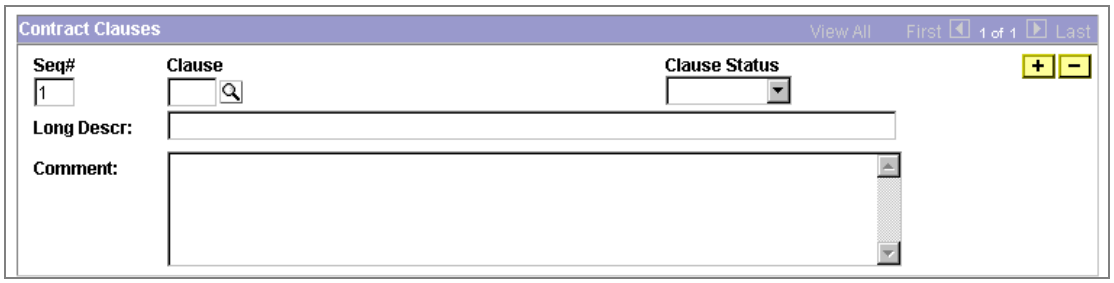
Access the Contract Data - Contract Type/Clauses page.



Contract Data - Contract Type/Clauses page (1 of 3)



Contract Data – Contract Type/Clauses page (2 of 3)



Contract Data – Contract Type/Clauses page (3 of 3)

Seq# (sequence number) When you add a clause to the contract, the system assigns a sequence number automatically.

Clause Select a clause.

Clause Status Defaults to the status associated with the clause you selected.

(BEL) Belgium

Duration Select a duration period for the employment contract.

Original Contract If ***Replacement*** defines the duration period, the Original Contract hyperlink appears. Click the Original Contract link to go to the Contract Replacement page to enter the employee id and original contract number.

Statute Select a contract statute, or employment category, for this employee.

Indep. Profession (independent profession) — If you selected ***Self employed*** as the contract type, provide the worker's independent profession here.

Substatute — Select a substatute, or employment subcategory. The system displays only those substatutes that are associated with the statute code you selected first.

Profession — If you selected ***Member of the Professions*** as the contract type, indicate additional profession information here.

(FRA) France

Any payee who is eligible for an URSSAF contribution must be associated with a contribution class code (social security code or regime).

Category TDS — Select a payee category: ***Apprentice, Executive,*** and ***Manager.*** This field is used to prepare the DADS TDS report.

Multiple Employer Rate — Some contracts reduce the earnings ceilings for some contributions (for example, URSSAF). The reduction appears here as a percentage.

If a payee has more than one employer, use the multiple employer rate to indicate the percentage of contributions that should be taken from each employer, in order to avoid over-taxing. The earnings ceilings are prorated using this rate. For example, suppose that a payee has two employers, and he receives 40 percent of his salary from employer A and 60 percent of his salary from employer B. In the Multiple Employer Rate field, employer A enters 40 and employer B enters 60.

CIPD(TDS) — Used to prepare the DADS TDS report. Valid values are ***Complete, Home, Inter.,*** and ***Partial.***

Gross Reduction Percentage — The gross reduction percentage is applied to the gross salary for specific job categories, such as for journalists and artists. These payees do not pay their contributions on their gross salaries. Instead, their gross salaries are reduced from the percentage input indicated here. For example, suppose that a payee is entitled to a 30 percent reduction. If he has a salary of 10000 FRF, he contributes for only 7000 FRF. This field has a default value of ***0.***

Social Security Code — Select a social security code. The social security code is the contribution class, or régime, of the payee. Any payee who is eligible for a contribution must be associated with a social security code.

(ITA) Italy

Plan ID — If the employee was assigned a contract type of ***Training and Labor,*** you must select a plan ID.

Reason	If the employee was assigned a contract type of ***Determined Period*** contract, you must enter a reason for the contract.
Empl ID Replaced (employee ID replaced)	If the reason for the determined period contract type is ***Maternity*** or ***Replacement,*** select the employee ID of the employee who is being temporarily replaced by this contract employee.
Project Name	Enter the name of the project on which the employee will be working.

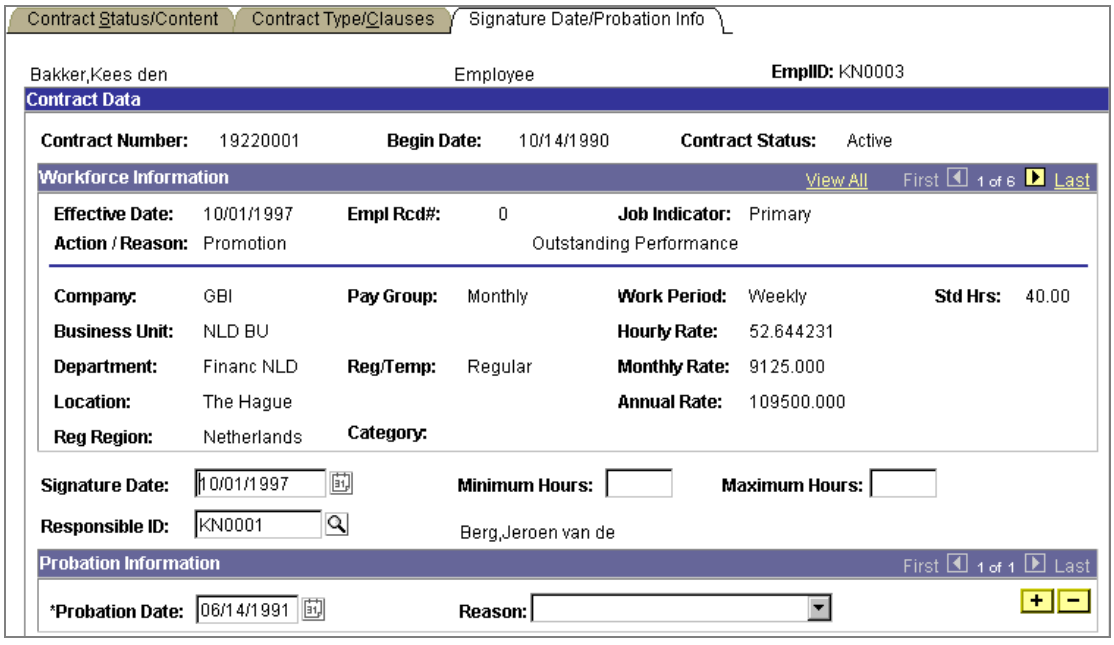
See Also

"Managing Country-Specific Data," Setting Up Belgian Employment Contract Statutes for Claeys Calculations

PeopleSoft Global Payroll for France PeopleBook, "Defining URSSAF Contributions"

Viewing Basic Employee Job Data and Designating Who Maintains Contract Information

Access the Contract Data - Signature Date/Probation Info page.



Contract Data - Signature Date/Probation Info page

The display-only data at the top of this page is derived from the Job Data component.

Signature Date	Enter the contract's signature date. This information is required in some European countries, including Germany.

Responsible ID	Indicate the company agent who drafted the contract and who is responsible for its language.
Minimum and **Maximum Hours**	Hours default from the values you indicate on the Installation table for this contract.
Probation Date	Enter multiple probation dates if they are required for this employee The probation date you enter here also appears on the employment record for this employee.
Reason	Indicate a probation reason, including ***New Date*** and ***Un-perform*** (indicating additional probation time for failure to perform within expectations for the position).

Setting Up and Tracking Temporary Assignments

Use the Job Data component to enter and track temporary assignment data. When you use *Temporary Assignment* as the Action/Reason the system suspends the employee's substantive job, transferring the substantive job data, including payroll and benefits information, to the next employee record for this employee. The Reactivation/Termination process reactivates the substantive job upon termination of the temporary assignment.

The Temporary Assignments feature requires that the system insert data rows at various stages throughout the process. For example, when selecting Temporary Assignment as the Action/Reason, the system inserts a data a second data row in addition which puts the substantive job on hold. When a data row has been inserted by the system, the word "*system*" appears next to the employee record number when viewed later. These data rows show an Action/Reason of *SUB* (hold substantive job), *RFA* (return from temporary assignment) or *RTS* (return to substantive job).

Understanding Temporary Assignments and Substantive Jobs

To understand how and why the system processes temporary assignments the way it does, it is important to understand the concepts of substantive jobs and temporary assignments.

Substantive Jobs

The substantive job assignment is the position the employee is hired into originally.

Temporary Assignments

When an employee covers the responsibilities of another position besides the substantive position, the employee works a temporary assignment. Temporary assignment data must be tracked the same way substantive job data is tracked.

Example

An employee hired into a teaching appointment takes this as the substantive job. The employee then receives a one month temporary assignment as a department head. The original teaching position is suspended for the duration of the temporary assignment.

It is also possible that the employee takes a temporary assignment on a partial basis. So, the employee might retain the substantive teaching position for twenty hours a week while also working the temporary assignment as department head for the other twenty hours. The employee cannot work beyond the forty-hour workweek but any combination of assignments might be entered to fill the forty hours.

Additional Considerations for Temporary Assignments and Data Processing

- When Position Data changes, this updates Position Data for all employees in the effected position regardless of the assignment being temporary or substantive. This does not alter the active or inactive status of the employee(s) in the effected position.

  Similarly, when the substantive position changes this does not effect the temporary assignments for the employee. The only exception to this would be the unlikely possibility that an employee's temporary and substantive assignments be in the same position.

- The employee pay rate matches the active assignment. If an employee works multiple assignments beyond the substantive job, the pay prorates for each assignment. For example, if the employee teaches for twenty hours a week and acts as department head for twenty hours a week, payroll processes each job at 50% of the standard pay. You can override the position data to change the pay rate manually on the Compensation page.

Note. Use the Job Data component pages for creating temporary assignments.

While this procedure outlines the required actions for entering temporary assignments, you can also make other adjustments, as necessary, on any of the pages in the component. For example, it might be necessary to adjust the pay rate on the Compensation page. This should all be done while creating the temporary assignment. When you save this information, the system suspends the substantive position.

To enter a temporary assignment:

1. On the Job Data – Work Location page, locate the substantive job that will be put on hold during the temporary assignment.
2. Insert a new data row with the following parameters:
   - The effective date that the temporary assignment begins.
   - *Temporary Assignment* for the Action/Reason.
   - The temporary assignment position number, if applicable.

3. On the Job Data – Job Information page enter the termination date for the temporary assignment in the Planned Exit field (optional).

4. Select the End Job Automatically check box to end the job on the termination date. This also reactivates the substantive job being put on hold when you run the Reactivation/Termination process.

5. Select the type of duties in the Duties Type field for this temporary assignment.

Note. You must enter the Planned Exit Date **and** select End Job Automatically for the Reactivation/Termination Process to run automatically for each assignment. If you do not complete these fields, the Temporary Assignment termination and Substantive Job reactivation must be handled manually.

Adding a Partial Temporary Assignment

It might be necessary to add a temporary assignment that is fewer than 40 hours per week while maintaining the substantive job filling the remaining hours. For example, an employee assigned to a temporary position that requires only 10 hours a week would retain the substantive position for the other 30 hours. In this case, both jobs must remain active.

To allow both jobs to remain active, use the Add Concurrent Job component for the temporary assignment. You must then adjust the standard hours of the substantive position so that the hours for both jobs – substantive and temporary – combined equals 40 hours. You can still enter an end date for the temporary assignment and have that job end automatically. However, you will need to manually readjust the standard hours for the substantive position after the temporary assignment ends.

To replace a substantive job with two or more temporary assignments, choose one of the temporary assignments to replace the substantive job following the same procedure for assigning one temporary job, adjusting the hours appropriately. Then assign the second temporary position as a concurrent job.

If an employee has multiple substantive positions and is being assigned one temporary position, the temporary assignment can only be assigned to one of the substantive positions. The other substantive positions must be manually suspended and reactivated using *Hold Substantive Job* and *Return to Substantive Job* as the Action/Reason.

Note. When assigning any combination of temporary assignments, you can still select the End Job Automatically check box on the Job Information page for the temporary assignment. However, if you have adjusted the standard hours for the substantive position, you must manually set the standard hours to the original setting once the temporary assignment has ended.

See also

"Hiring Your Workforce," Adding Concurrent Jobs

Running the Periodic Temporary Job Update Process

This process must be run periodically to terminate temporary assignments (with job end dates) and reactivate substantive positions. This process inserts new data rows into the employee record. These data rows have reason codes of *SUB* (hold substantive job), *RFA* (return from temporary assignment) and *RTS* (return to substantive job) and the designation "*system*" next to the employee record number when viewed later.

Pages Used to Update Temporary Job Data

Page Name	*Object Name*	*Navigation*	*Usage*
Reactivate/Termination Update	RC_TEMP_ASSGN_UPDT	Administer Workforce, Administer Workforce (GBL), Process, Reactivate/Termination Update	Enter the Expected Job End Date up to: and run this process.

See Also

"Hiring Your Workforce," Entering Employee Job Information

"Setting Up the Administer Workforce Business Process," **Defining Reasons for Personnel Actions**

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Appendix: PeopleSoft Application Fundamentals for HRMS Reports," Administer Workforce Reports, TAS001 – Temporary Assignments w/out End Date and TAS002 – Temporary Assignments due to Complete

Tracking Disabilities

You can track any disabilities your employees may have, as well as check your own facilities' accessibility.

Pages Used to Track Disability

Page Name	*Object Name*	*Navigation*	*Usage*
Disability	DISABILITY	Administer Workforce, Administer Workforce (GBL), Use, Disability, Disability Administer Workforce, Administer Workforce (USF), Use2, Disability Use, Disability Administer Workforce, Administer Workforce (FPS), Use, Disability	Indicate if a worker is disabled and to record details of the disability.
NZL Disability Table	DISABILITY_TBL_NZL	Administer Workforce; Administer Workforce (GLB); Setup Lcl; NZL Disability Table	Use the New Zealand Disability Codes Table page to create new disability type codes or to modify existing codes.

Defining Accommodation Types

You'll use the Accommodation Types Table page to define the types of workplace accommodations your company makes for disabled employees. We've included it in the Administer Workforce global and local country menus so that you can set up accommodation types when working with disabled employees during the hiring process.

See Also

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "Meeting Disability Requirements," Meeting Disability and Discrimination Act Data Regulatory Requirements

Documenting Disability Accommodations

Use the three Accommodation Data pages—Accommodation Request, Accommodation Option, and Accommodation Job Task—to track the data you need to document that your company doesn't have discriminatory practices against people with disabilities. And when employees or applicants request that you make accommodations to enable them to perform job tasks, you can track all the steps involved in resolving those requests.

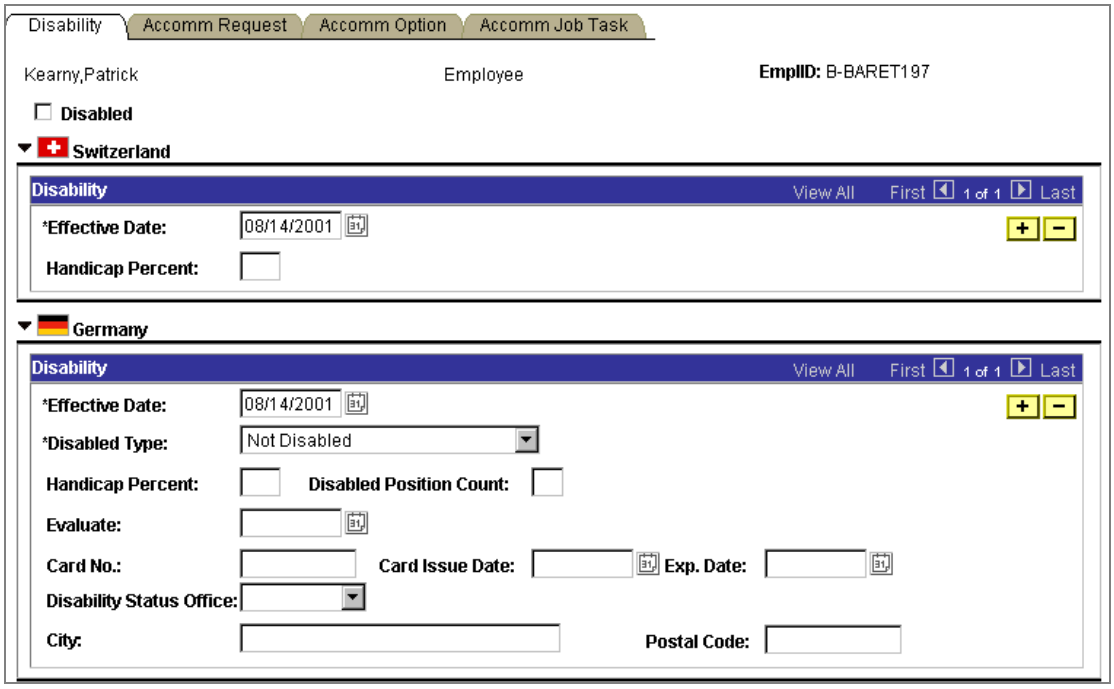
See Also

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "Meeting Disability Requirements," Meeting Disability and Discrimination Act Data Regulatory Requirements

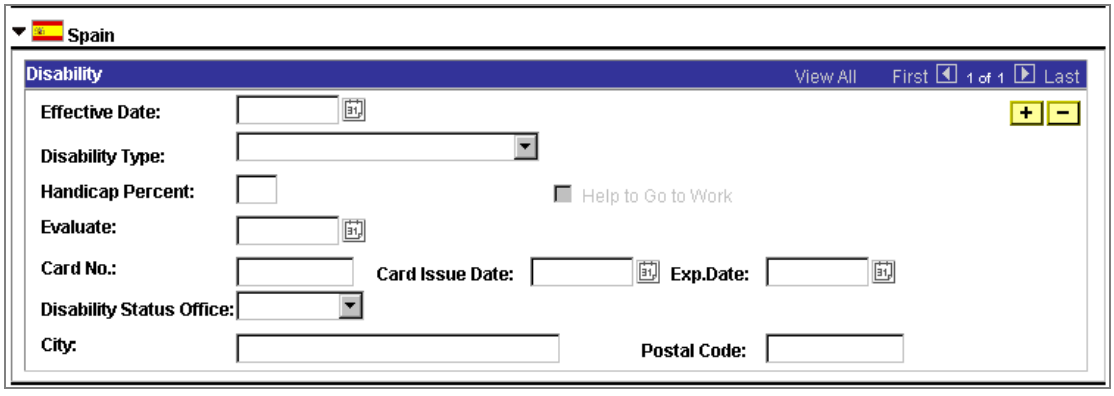
Entering Disability Information

Track information regarding employee disabilities using the Disability component, which consists of the Disability page and the three Accommodation Data pages. Using these pages, record information regarding disabled employees or workers, and the impact on accommodation requirements for your organization. The information can also be used for regulatory reporting and protecting your organization from claims of disability discrimination.

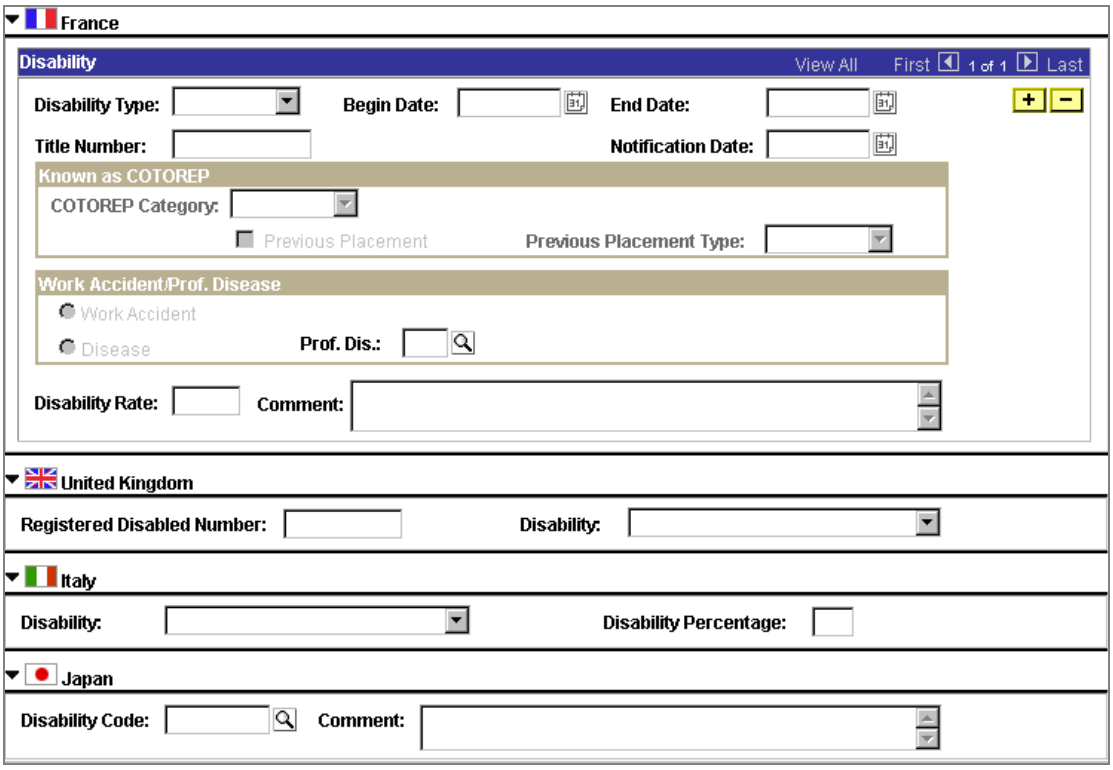
Access the Disability page.



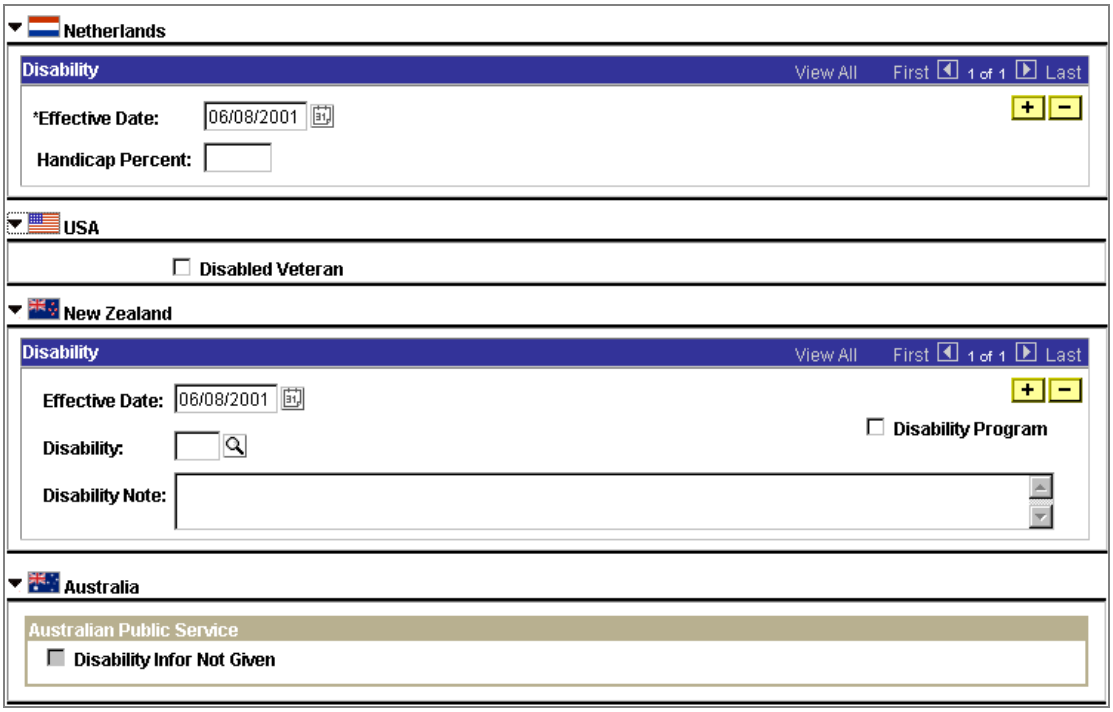
Disability page (1 of 4)



Disability page (2 of 4)



Disability page (3 of 4)



Disability page (4 of 4)

Disabled Select if the employee is disabled.

(CHE) Switzerland

Handicap Percent Enter a percentage of disability from ***0*** to ***100.***

(GER) Germany

Use the **Germany** group box to track employee disability information that your company needs to demonstrate compliance with the Handicapped Workers Act of 1961. For your company's purposes, the act defines a handicapped person as someone who is registered as handicapped and who is disabled to the degree that it impacts their earning capacity. When registered as handicapped, the individual is issued a disability card, and your company must track the disability card number, who issued the card, the issue date, and the expiration date.

Disabled Type Identify the employee's disability type.

Handicap Percent Enter the degree of the disability.

Disabled Position Count Enter the degree to which this employee's disability can be applied to the total number of positions filled by disabled employees. Not ever disabled employee may count as a full disabled position.

Evaluate Enter the date the person's disability was evaluated or reviewed. The evaluation date can be different from the effective date for the disability entry. To maintain a history of evaluation date records, such as past and future evaluations, insert additional data rows and use the scroll bar to navigate between rows.

Card No, Card Issue Date, and Exp Date (disability card number, card issue date, and card expiration date) Enter the employee's disability card number, card issue date, and card expiration date.

Disability Status Office For each disability card, enter the disability status office that issued the card.

(ESP) Spain

Disability Type Select a disability type:

- ***Non Disability*** (none)
- ***Physical Disability***
- ***Psychological Disability***
- ***Sensorial Disability***

Handicap Percent Spanish law requires you track a disabled worker's percentage of disability. Enter a percentage from ***0*** to ***100.***

Help to Go to Work Select if the employee needs physical assistance to go to work. This check box is available only to employees

	whose disability percentage is between 33% and 65% and is used to calculate a tax deduction for that employee.
Evaluate	Enter the date when the disability was evaluated.
Card No. (card number)	The Spanish government gives people with disabilities a card that certifies their percentage of disability. Enter the card number here.
Card Issue Date	Enter the date when the disability card was issued.
Exp. Date (expiration date)	Enter the disability card's expiration date.
Disability Status Office	Select the office in charge of monitoring the employee's disability status.

(FRA) France

Use this group box to track employee disability information that your company needs to demonstrate compliance with French regulations regarding disability hiring quotas, and to provide notifications to the disabled employee's social security commission, or COTOREP (Commission Technique d'Orientation et de Reclassement Professionnel).

Disability Type	Indicate the employee's disability type, which identifies whether the employee is classified by COTOREP as disabled, or instead collects a financial stipend from the social security commission for some other similar reason. These reasons may include married widows, orphans, spouses of a disabled persons, and war widows. This information is tracked so your company can complete the required report of this information in a manner similar to the French Disability Report.
Title Number	Enter the employee's disability number assigned by the COTOREP.
Begin Date	Enter the date the disability started.
End Date	If the disability wasn't permanent, enter the disability end date.
Notification Date	Record the date your company notified the social security commission that you hired the employee.

Known as COTOREP (Les Commissions Techniques d'Orientation et de Reclassement Professionnel)

When you first open the page, the fields in the **Known as COTOREP** group box are unavailable for entry. If you select ***COTOREP*** as the **Disability Type,** the fields become available.

COTOREP Category	Enter the level of severity of the employee's disability, as defined by the social security commission: ***COTOREP A:.*** Light disability.

COTOREP B: Medium disability.

COTOREP C: Severe disability.

Previous Placement — Select this check box to indicate that the employee had a prior disability placement through COTOREP. If they didn't, clear the check box.

Previous Placement Type — If the employee had a previous placement, indicate the previous placement type.

Work Accident/Prof. Disease

When you first open the page, the fields in the **Work Accident/Prof. Disease** group box are unavailable for entry. If you select ***WrkAcc/Dis*** (work accident/disabled) as the **Disability Type,** the fields become available.

Work Accident and **Disease** — Select whether the disability is the result of a work accident or a disease.

Prof. Dis. (professional disease) — If the disability is the result of a disease, select the type of disease.

Disability Rate

In the specific case of a disability due to a work accident or a professional disease, the National Social Security Administration (not COTOREP) assigns a percentage of disability to the employee. The purpose of this percentage is to enable a calculation for an allowance paid by National Social Security Administration. An employee can be recognized as a disabled person by COTOREP and also be a victim of a work accident or disease.

Disability Rate — When applicable, enter the percentage of disability (***0*** to ***100*** percent).

(GBR) UK

Use the **UK** group box to track disability data for your U.K. employees and to demonstrate your compliance with the fair hiring and employment provisions of the Disability Discrimination Act of 1995.

Registered Disabled Number — Enter the employee's Registered Disabled Number.

Disability — Select the employee's disability type.

(ITA) Italy

Disability — Select the employee's disability type.

Disability Percentage — Enter the employee's disability percentage, as determined by the examining doctor.

(JPN) Japan

Use this group box to track an employee's disability category. This information is used for regulatory and tax-reporting purposes.

Disability Code — Enter the employee's disability code (values are legal disability categories set by the Ministry of Labor): ***Disabled, Heavily disabled, Heavy mental disorder,*** and ***Mental disorder.***

(NLD) Netherlands

Use this group box to record disability information for your workforce, and then use this information to document compliance with regulations under the Disabled Employees Act of 1985 *(*Wet Arbeid Gehandicapte Werknemers*)*.

Handicap Percent — Enter the percentage degree to which the employee is handicapped.

USA

Disabled Veteran — Select this option only if the employee is a disabled veteran.

(NZL) New Zealand

Disability — Select the employee's disability type. These values come from the NZL Disability Table.

Disability Program — Select if there is an association between the employee and a disability program.

Disability Note — Enter additional comments about the disability.

(AUS) Australia

Disability Infor Not Given (disability information not given) — Select this check box when the employee disability information is not provided.

Handling Company Credit Cards

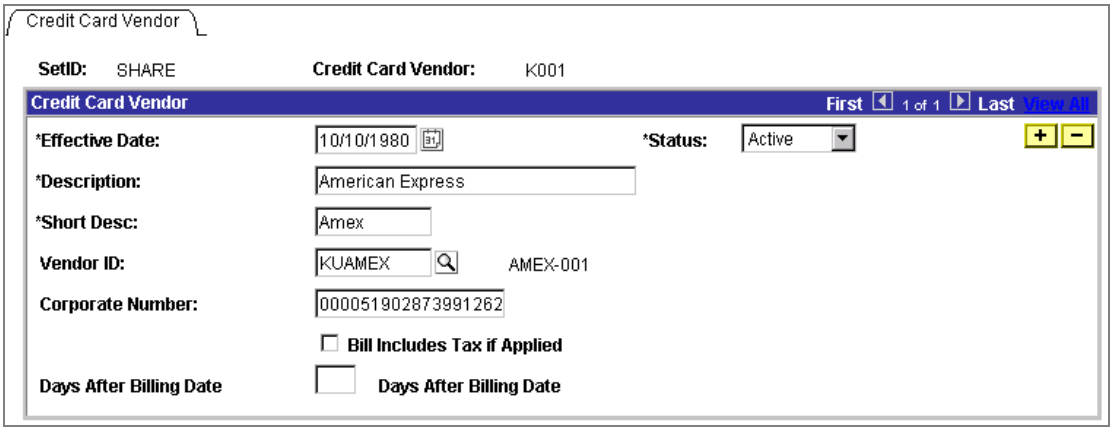
In PeopleSoft Human Resources, you can identify company credit cards and then assign those cards to employees. First identify the credit card vendor, and then associate an employee with one or more cards from those vendors.

Pages Used to Handle Company Credit Cards

Page Name	Object Name	Navigation	Usage
Credit Card Vendor	CC_CARD_TBL	Administer Workforce, Administer Workforce (GBL), Setup, Credit Card Vendor Table, Credit Card Vendor Administer Workforce, Administer Workforce (USF), Setup, Credit Card Vendor Table, Credit Card Vendor Administer Workforce, Administer Workforce (FPS), Setup, Credit Card Vendor Table	Enter vendors of credit cards you'll assign to employees. You must have previously defined credit card types on the Translate table before using this page. A vendor that you identify here can be linked to an actual vendor in the Accounts Payable Vendor table.
Credit Card Data	CC_CARD_DATA	Administer Workforce, Administer Workforce (GBL), Use, Credit Card Data, Credit Card Data Administer Workforce, Administer Workforce (USF), Use2, Credit Card Data, Credit Card Data Administer Workforce, Administer Workforce (FPS), Use2, Credit Card Data	Assign company credit cards to employees.

Identifying Company Credit Cards

Access the Credit Card Vendor page.

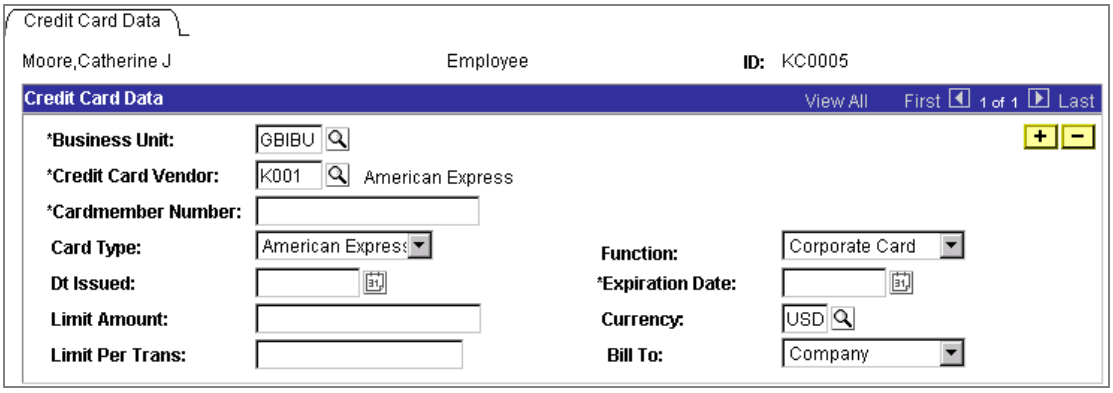


Credit Card Vendor page

Vendor ID	Enter in the vendor ID.
Corporate Number	Enter your company's corporate number. This isn't a credit card number.
Bill Includes Tax if Applied	Select if the bill includes tax.
Days After Billing Date	Enter the number of days after the billing date that the bill becomes due.

Assigning Cards to Employees

Access the Credit Card Data page.



Credit Card Data page

Credit Card Vendor	Select the card's vendor.
Cardmember Number	Enter the card number.
Dt Issued	Enter the date the card was issued.
Expiration Date	Enter the date the card expires.
Card Type	Select the card type.

Limit Amount	Enter the credit card limit amount.
Limit Per Trans (Limit Per Transaction)	Enter the limit amount per transaction.
Function	Select the main function for this card (for example, debit card, phone card, or corporate card).
Bill To	Select whom to bill for this credit card.

Handling Company Property

Identify company assets, assign a value to those assets, and then assign those assets to employees.

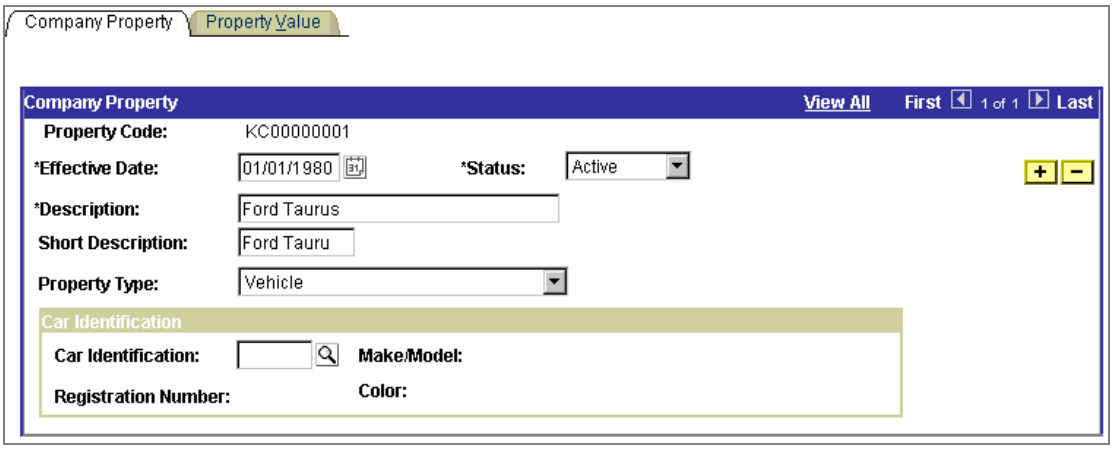
Pages Used to Handle Company Property

Page Name	*Object Name*	*Navigation*	*Usage*
Company Property	COMPANY_PROP_TBL1	Administer Workforce, Administer Workforce (GBL), Setup, Company Property Table, Company Property Administer Workforce, Administer Workforce (FPS), Setup, Company Property Table, Company Property	Identify company property, such as vehicles, computer equipment, tools, or uniforms.
Property Value	COMPANY_PROP_TBL2	Administer Workforce, Administer Workforce (GBL), Setup, Company Property Table, Property Value Administer Workforce, Administer Workforce (FPS), Setup, Company Property Table, Property Value	Enter data about the value of your company property.

Page Name	Object Name	Navigation	Usage
Company Property	COMPANY_PROPERTY	Administer Workforce, Administer Workforce (GBL), Use, Company Property, Company Property Administer Workforce, Administer Workforce (USF), Use2, Agency Property, Company Property	Assign company property to employees. You must have previously entered valid values on the Company Credit Card Table page and the Company Property Table page.

Identifying Company Assets

Access the Company Property page.



Company Property page

Property Code The system displays the property code you set for this item.

Property Type Select a type of property, such as ***Vehicle*** and ***Computer Equipment***.

Car Identification If you select ***Vehicle*** as the **Property Type**, the **Car Identification** group box appears.

When you enter a car ID, the system automatically completes the **Registration Number, Make/Model,** and **Color** fields based on the values stored for that car ID.

Make/Model Enter the make/model for this item.

Model Enter the model.

Registration Number Enter in the car's registration number.

Color Enter in the car's color.

Note. To help you set up company property codes to use in assigning property to employees, we've included the Company Property Table page in the Administer Workforce menu. You can also use the table in the Monitor Health/Safety menu; it is the same page.

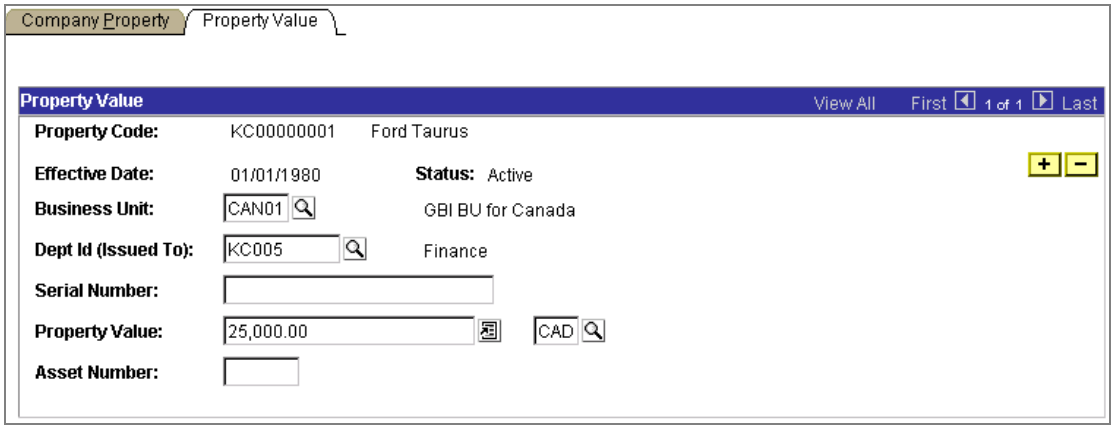
See Also

PeopleSoft Human Resources PeopleBook: Administer Company Cars, "Administering Company Cars for Your Workforce"

PeopleSoft Human Resources PeopleBook: Monitoring Health and Safety, "Tracking Personal Data for People Involved in Incidents," Entering Non-Employee Data

Assigning Values to Company Property

Access the Property Value page.



Property Value page

Dept ID (Issued To): Enter the identification number of the department to which the property was issued.

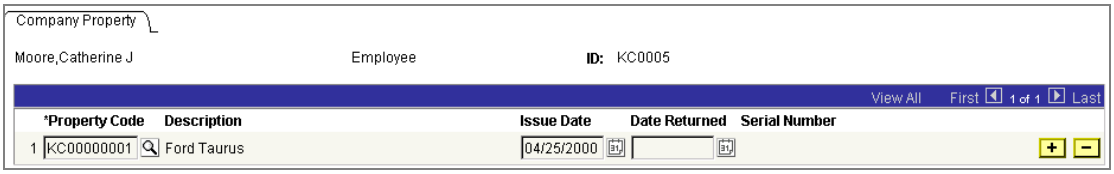
Serial Number Enter the serial number.

Property Value Enter the value of the property and the currency you are using.

Asset Number Enter the asset number.

Assigning Company Property to Employees

Access the Company Property page.



Company Property page

Property Code The property code for the item you've assigned to the employee.

Issue Date Enter the date you issued the property to the employee.

Date Returned After the employee returns the property, enter the date it was returned.

Serial Number Enter the serial number of the item you've assigned to the employee.

See Also

PeopleSoft Human Resources PeopleBook: Monitoring Health and Safety, "Tracking Personal Data for People Involved in Incidents," Entering Non-Employee Data

Tracking Dependent and Beneficiary Data

Use the Dependent Data component to record important information for dependents that may accompany an employee on an international assignment or international travel. You must also have these pages set up prior to enrolling employees in specific benefit programs.

There are five pages to the Dependent/Beneficiary component. Three main pages and two auxiliary pages enable you to track a significant amount of information, according to your organizational procedures.

The Name and Address pages define the relationship of the person to the employee and determine whether the person is a dependent, beneficiary, or both. This affects the person's eligibility to be enrolled in health benefits or to be assigned as a beneficiary in certain benefit plans.

The Personal Profile page defines the personal information about the person. This data also affects whether the person is eligible for benefits.

Note. Also find these pages in the Track Global Assignments and Define General Data (NLD) menus. The pages are identical in all menus.

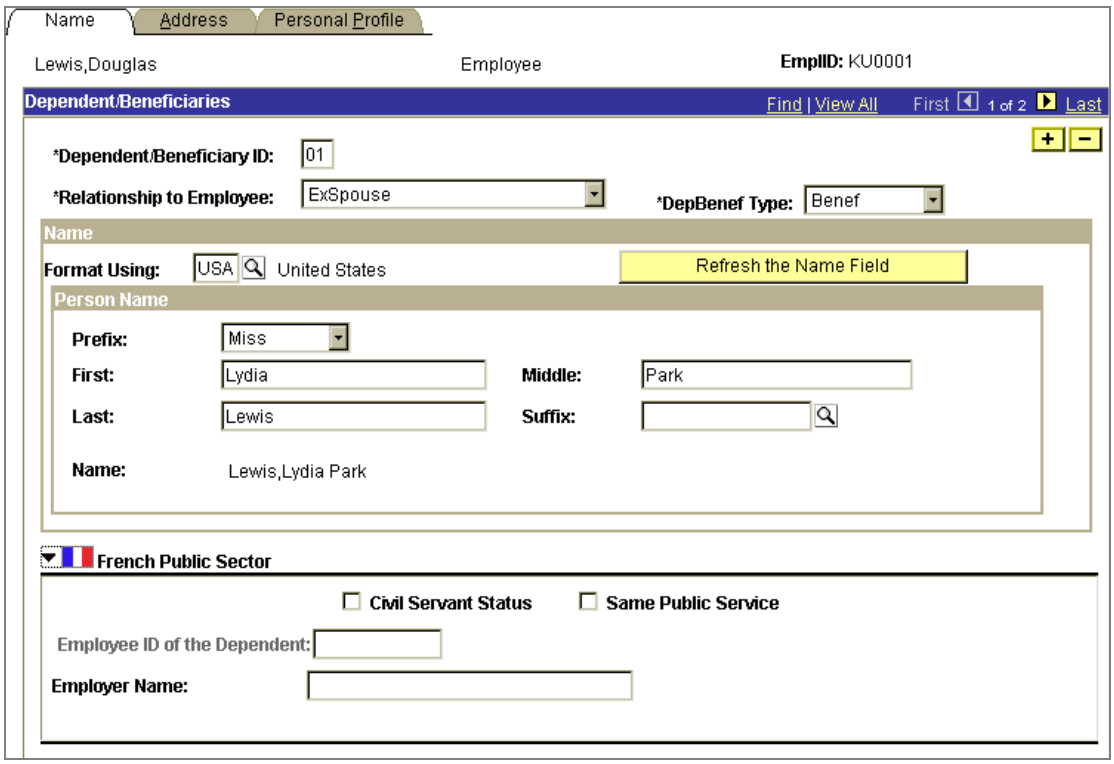
Pages Used to Track Dependent Identification Data

Page Name	*Object Name*	*Navigation*	*Usage*
Name	DEPEND_BENEF1	Administer Workforce, Administer Workforce (GBL), Use, Dependent Data, Name Compensate Employees, Administer Base Benefits, Use, Dependent/Beneficiary Define Business Rules, Define General Data (NLD), Use, Dependent/Beneficiary Administer Workforce, Administer Workforce (FPS), Use, Dependant Data, Name	Enter or update information about a dependent's name.
Address	DEPEND_BENEF_ADDR	Administer Workforce, Administer Workforce (GBL), Use, Dependent Data, Name Compensate Employees, Administer Base Benefits, Use, Dependent/Beneficiary Define Business Rules, Define General Data (NLD), Use, Dependent/Beneficiary Administer Workforce, Administer Workforce (FPS), Use, Dependant Data, Address	Enter or update information about a dependent's address.

Page Name	*Object Name*	*Navigation*	*Usage*
Personal Profile	DEPEND_BENEF2	Administer Workforce, Administer Workforce (GBL), Use, Dependent Data, Name Compensate Employees, Administer Base Benefits, Use, Dependent/Beneficiary Define Business Rules, Define General Data (NLD), Use, Dependent/Beneficiary Administer Workforce, Administer Workforce (FPS), Use, Dependant Data, Personal Profile	Enter or update information about a dependent.
Personal Profile: Riders/Orders	DEPBEN_RIDERS	Click the Riders/Orders link on the Entering Dependent and Beneficiary Information.	Enter detailed information about the court-ordered benefit for the specified dependent or beneficiary.
Phone Numbers	DEP_BENEF_PHON_SEC	Click the Phone Numbers link on the Dependent/Beneficiary – Personal Profile Page	Enter additional dependent/beneficiary phone numbers.

Entering Dependent/Beneficiary Name Information

Access the Dependent Data - Name page.



Dependent Data - Name page

The system displays the name and the employee **ID** for the employee you entered to access this page.

Note. There is no effective date for dependent/beneficiary data because dependents and beneficiaries become effective when you enroll them in a benefit plan.

Dependent/Beneficiary ID — The system assigns the Dependent/Beneficiary ID. You can change it, although you can't have duplicate IDs for dependents or beneficiaries of the same employee. You can, however, use these same IDs for a different employee's dependents and beneficiaries.

Relationship to Employee — Enter the dependent/beneficiary's relationship to the employee. If you've set up the Dependent Relationship table, the system automatically completes the Relationship to Employee field according to the relationships established in the table.

DepBenef Type (dependent beneficiary type) — Select the type of dependent/beneficiary. Your selection determines whether you can enroll this person into a benefit plan as a dependent or assign this person as a beneficiary.

If you have set up the Dependent Relationship table, the system will use that information to populate and validate this field.

Benef: Beneficiary only.

COBRA Only: COBRA Dependent/Beneficiary only.

Dep/Benef: Dependent and beneficiary. If you plan to enroll the person as a dependent *and* assign the person as a beneficiary, you must select this option.

Dependent: Dependent only.

Estate: If the beneficiary of a life plan is the estate of an employee, enter this value**.**

None: The person is neither a dependent nor a beneficiary. This option is typically used when the person is a co-owner of an U.S. Savings Bond or to make a person ineligible to participate in a benefit plan. Also use it to inactivate an individual from participating in benefit enrollments.

QDRO Emp: Used for PeopleSoft Pension Administration.

QDRO Rec: Used for PeopleSoft Pension Administration.

Note. The values ***Cobra Only, None, QDRO Emp,*** and ***QDRO Rec*** are Canadian and United States values only.

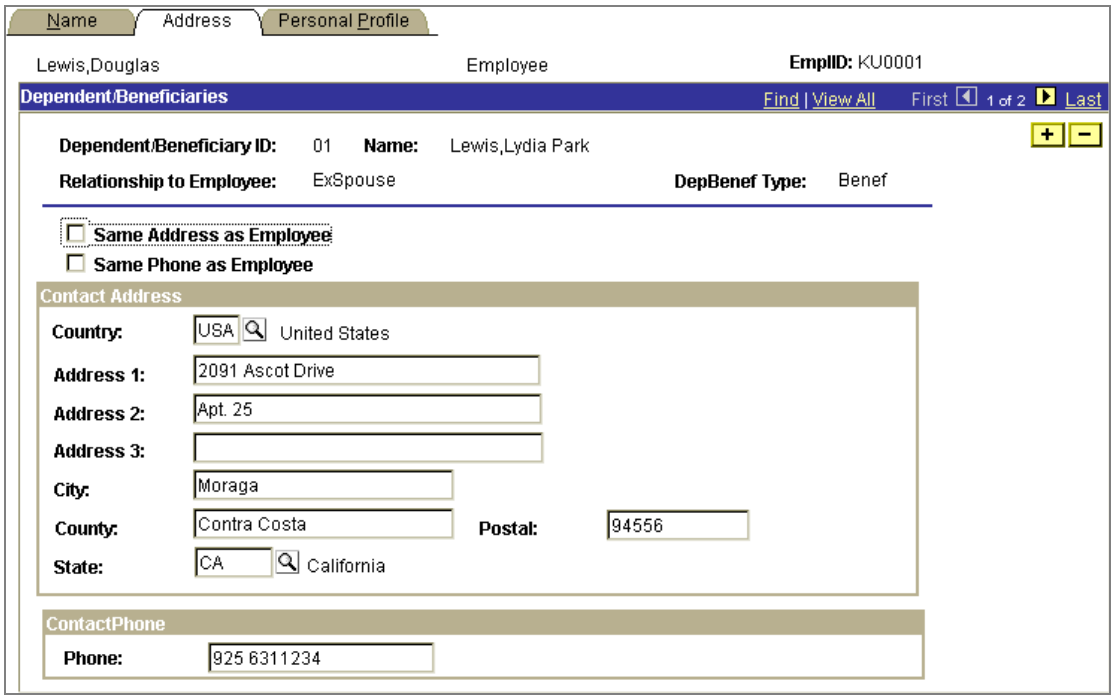
Note. When running a calculation, the system determines if an employee is married by looking at the dependent/beneficiary table to see if there is a dependent identified as the spouse. It is possible for the dependent/beneficiary pages to show more than one spouse, to show a former spouse as a current spouse, to show no spouse even if the employee's marital status is married, or to show a spouse even though the employee's marital status is single. These and other inconsistencies in the dependent/beneficiary data can cause problems with your pension calculations. It's best to verify dependent/beneficiary information when calculating pension benefits. If you need to update the information, use Setting Up Dependent and Beneficiary Information.

See Also

PeopleSoft HRMS PeopleBooks Preface, "About These HRMS PeopleBooks," PeopleBooks Standard Page Element Definitions

Entering Dependent Address Information

Access the Dependent Data - Address page.



Dependent Data - Address page

The employee's name and ID, as well as this dependent or beneficiary's ID, relationship to the employee, and dependent or beneficiary type appear at the top of the page.

Same Address as Employee Select if the dependent has the same address information as the employee. If selected, you don't need to complete any of the address fields.

Address Type Select the employee address type that is the same as this beneficiary's.

Same Phone as Employee Select if the dependent has the same phone information as the employee. If selected, you don't need to complete any of the phone fields. A beneficiary can have the same address as the employee but a different phone number.

Phone Type Select the employee phone type that is the same as this beneficiary's.

Contact Address Enter the dependent's contact address information in the Contact Address group box.

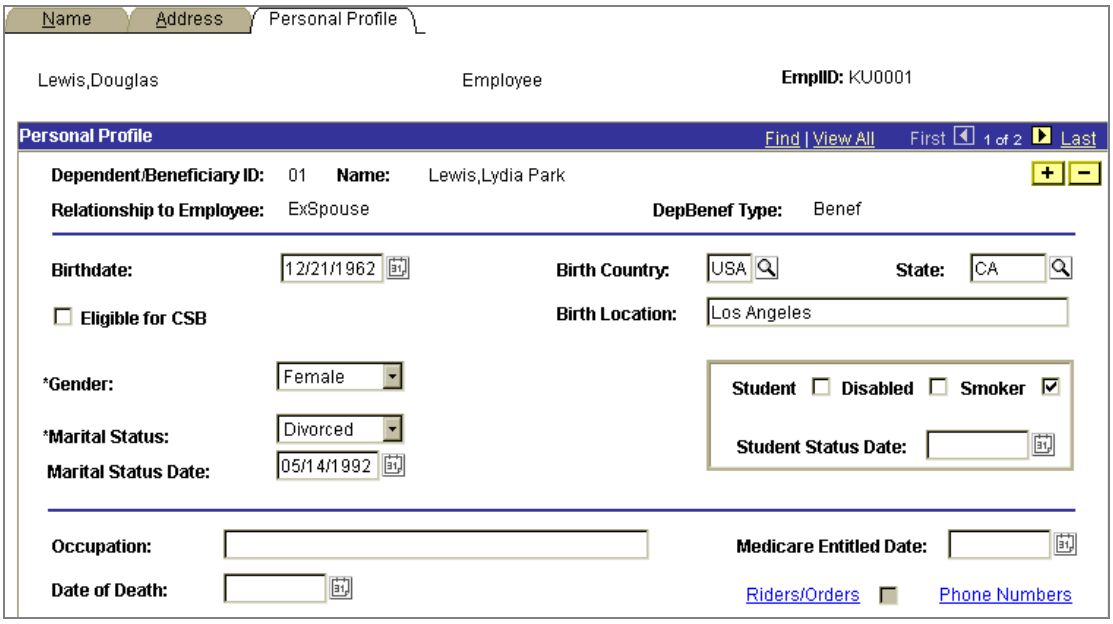
Contact Phone Enter the dependent's contact phone information in the Contact Phone group box.

(NLD) See Also

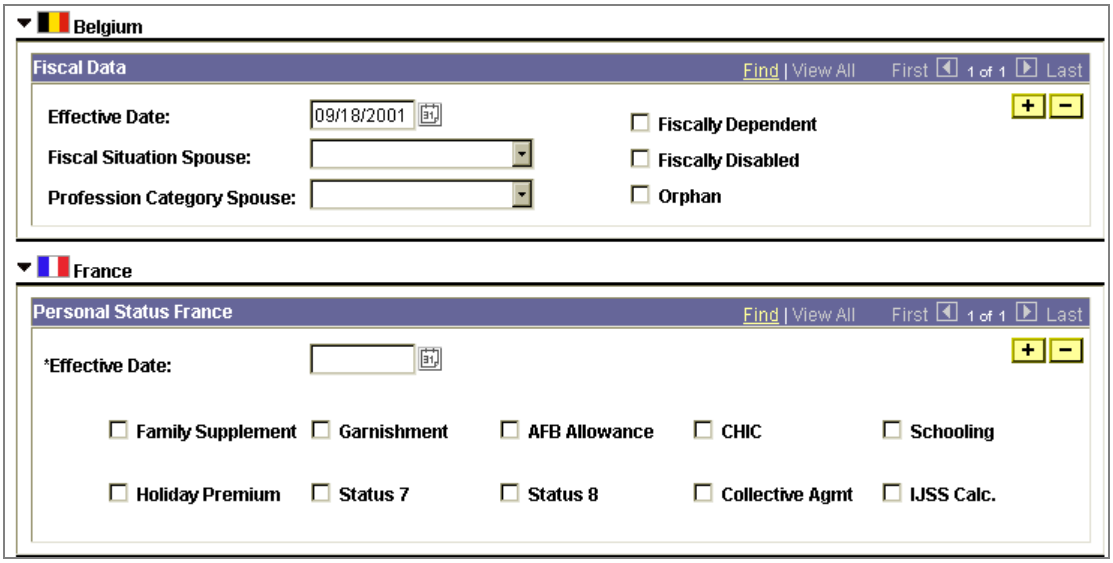
PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Local Country Functionality" Loading Dutch Postal Codes

Entering Dependent and Beneficiary Information

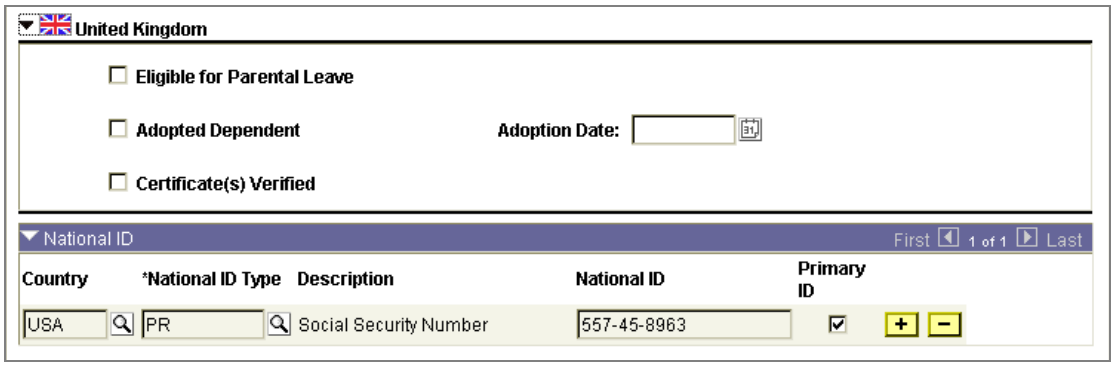
Access the Dependent Data - Personal Profile page.



Dependent Data - Personal Profile page (1 of 3)



Dependent Data - Personal Profile page (2 of 3)



Dependent Data – Personal Profile page (3 of 3)

Birthdate Enter the dependent/beneficiary's birthdate. Certain benefit plans, such as life insurance, require the birthdate to determine an individual's eligibility.

Birth Country Enter the country in which the dependent/beneficiary was born. Depending on the country you enter, additional fields may appear requiring more data entry.

Birth Location Enter a city and/or county to further define the place in which the dependent/beneficiary was born.

Eligible for CSB If you are entering dependent/beneficiary information for a Canadian employee, select this check box to indicate that the dependent or beneficiary is an eligible registrant for an employee purchasing Canadian Savings Bonds (CSBs). The PeopleSoft Payroll-CSB Registrant page verifies the selection of this check box.

Marital Status Enter the dependent/beneficiary's marital status.

Marital Status Date When an individual undergoes a change in marital status, enter the date of the change. This is critical for determining eligibility for benefits enrollment.

Student Select this check box if the dependent/beneficiary is a student.

Student Status Date When the dependent's student status changes (in other words, when you select or clear the Student check box), enter the date of the change. This is critical for determining eligibility for benefits enrollment.

Disabled Select if the dependent/beneficiary is disabled.

Smoker Select if the dependent/beneficiary smokes. The Smoker check box is necessary for dependents enrolled in benefit plans using calculation rules. The system calculates age-graded rates for individuals differently depending upon whether they smoke.

Occupation Enter the dependent/beneficiary's occupation, if known.

Medicare Entitled Date Enter the date upon which the dependent/beneficiary will become eligible for Medicare coverage.

Date of Death When the dependent/beneficiary dies, enter the date of the death.

Riders/Orders Click this link to access the Dependent Data - Personal Profile: Riders/Orders Page.

Phone Numbers Click this link to access the Dependent Data - Personal Profile: Phone Numbers Page.

National ID

Use this group box to enter the dependent or beneficiaries' national identification number. Dependents and beneficiaries with citizenship in more than one country can have more than one national ID. Add as many rows as required.

Country Select the country that issued the dependent's national ID.

National ID Type The system populates this field automatically with the default value you established for this country on the National ID Type Table Page. You can select another valid type.

National ID Enter the dependent's national ID number. The system automatically checks the format of your entry against the default format you entered on the National ID Type Table Page.

Primary ID Select if the national ID is the dependent's primary ID. If this is the only data row for this person, the system selects the check box by default. You can override this default.

(BEL) Belgium

Fiscally Dependent Select if the employee is fiscally responsible for the dependent.

Fiscal Situation Spouse Select the appropriate fiscal situation from the list.

Fiscally Disabled Select if applicable.

Profession Category Spouse Select the appropriate category from the list.

Orphan Select if applicable.

(FRA) France

Use this group box to store information that can be passed on to your payroll system for payroll processing.

Family Supplement For numerous families, payroll calculates the family allowance amount that your organization gives to an employee based on their family dependents. This calculation is based on the number and type of employee

	dependents. Select this check box to indicate whether the corresponding dependent has to be taken into account in the calculation of the supplemental family allowance.
Garnishment	This option deals with court orders requiring that an employee's wages by garnished. When an employee is under a court order, payroll can calculate the percentage and amount of the employee's salary that is frozen for every pay period that has to be transferred to the relevant government agency. Depending on the number of dependents, this amount is reduced. The greater the number of dependents is, the lower the percentage of frozen salary. Use this check box to indicate if the corresponding dependent has to be taken into account in the calculation of the frozen garnishment amount.
AFB Allowance (French Banking Association)	The French Banking Association delivers a special allowance based on the number of dependents. Select this check box to indicate whether the corresponding dependent has to be taken into account in the calculation of this allowance.
CHIC	CHIC is a medical insurance company that employees can opt to use to supplement their medical insurance coverage. This insurance company delivers a special allowance based on the number of dependents. Select the CHIC check box to indicate whether the corresponding dependent has to be taken into account in the calculation of this allowance.
Schooling	See **Family Supplement.**
Holiday Premium	See **Family Supplement.**
Status 7 to Status 10	Configure these fields to capture additional payroll related status information.

(GRB) United Kingdom

Eligible for Parental Leave	Select if the dependent qualifies the employee for Parental Leave. Select the Disabled checkbox on the top page if it also applies here.
Adopted Dependent	Select if the employee adopted the dependent.
Adoption Date	If adopted, enter the adoption date.
Certificate(s) Verified	Select to indicate that appropriate certificates have been provided to verify this dependent information.

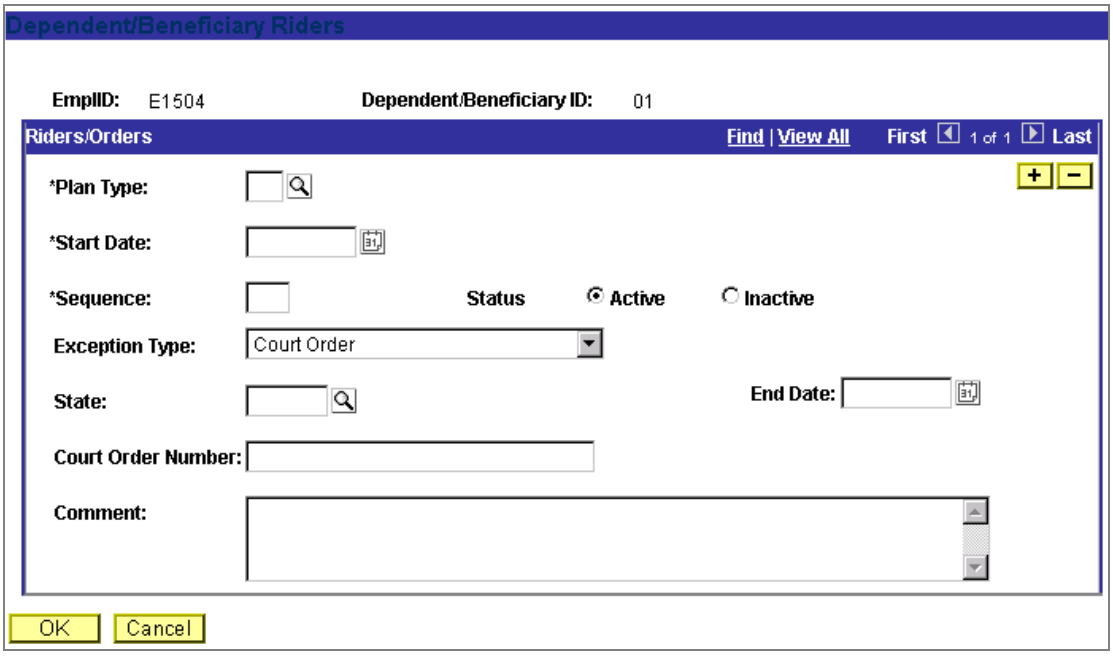
See Also

PeopleSoft Human Resources PeopleBook: Base Benefits, "Introduction to Base Benefits"

Entering Information About Court-Ordered Benefits for Dependents

The Dependent/Beneficiary Riders page enables you to enter any court-ordered benefits or spousal waivers. This enables the system to validate any changes or omissions in benefit enrollments with a recorded rider. When an employee enrolls in a benefit plan and there is a court-ordered mandate specifying that a benefit be provided, the system will not complete the enrollment.

Access the Dependent Data - Personal Profile: Riders/Orders page.



Dependent Data - Personal Profile: Riders/Orders page

Plan Type Enter the type of plan to which the court order relates.

Start Date Enter the date on which the court order becomes effective.

Seq (sequence) Prioritizes court orders when you have more than one that takes effect on the same day. Enter a number that indicates which court orders take precedence over others. If there is only one court order, enter a sequence of ***1.***

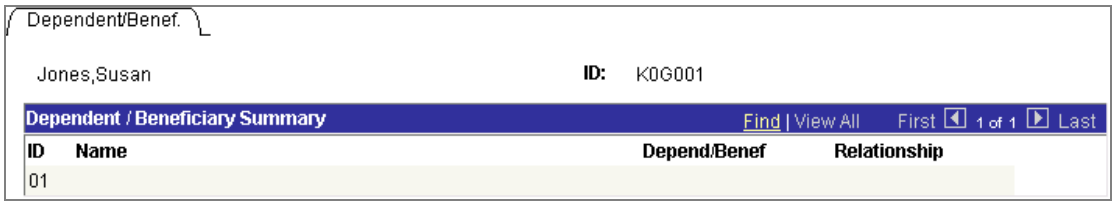
Status Select whether the court order is ***Active*** or ***Inactive.*** This is typically used to void a court order before the end date takes effect. If the status is *Inactive,* the system won't enforce any validations against this court order.

Rider Type Select whether this is a court order (a legal document that grants a dependent the right to receive benefit coverage), spousal waiver (document that formally waives a spouse's claim to a minimum beneficiary allocation of funds from a life insurance policy or savings plan), or neither.

End Date	Enter the date on which the court order ends. When the court order expires, the system won't enforce any validations against this court order.
Court Order Number	Enter the official number issued by the state for this court order.

Viewing Dependents and Beneficiaries for Employees

Access the Dependent/Beneficiary Summary page.



Dependent/Beneficiary Summary page

ID (employee ID)	The employee's identification number appears at the top of the page, to the right of the employee's name.

Dependent/Beneficiary Summary

The Dependent/Beneficiary Summary displays a summary of all dependent/beneficiary data for an employee.

ID	The **ID** column contains the ID of the dependent or beneficiary.
Name	The **Name** column contains the name of the dependent or beneficiary.
Depend/Benef (dependent/beneficiary)	Indicates whether the person is a dependent or beneficiary.
Relationship	Describes the relationship of the dependents and beneficiaries to the employee.

Note. Over time, changes occur and you need to terminate dependent enrollments or beneficiary statuses. Remember, you enroll dependents and assign beneficiaries when you enroll employees. As with employees, to terminate a dependent enrollment or beneficiary status, you must enter a row of data with the termination date. Don't make such a change using the Dependent/Beneficiary Data page. Make the change using the benefit detail page for the benefit in question.

Warning! If you delete dependent/beneficiary data using the Dependent/Beneficiary Data pages, you destroy historical data. Once you change enrollment data, it won't matter that the dependent or beneficiary data is available here. It must remain if your system is to provide correct historical information.

Entering and Tracking Additional Employee Data

Use the Administer Workforce module to enter and track other employee data such as:

- Badge numbers.
- Business expenses.
- Prior work experience.
- Emergency contacts.
- Citizenship and visa status.
- Driver's license data.
- Banking information.

Pages Used to Enter and Track Additional Employee Data

Page Name	*Object Name*	*Navigation*	*Usage*
Badge	BADGE	Administer Workforce, Administer Workforce (GBL), Use, Badge, Badge Administer Workforce, Administer Workforce (FPS), Use, Badge	Record badge numbers you issue to employees. You must have previously entered Badge Type data on the Translate table before using this page.
Business Expenses	BUSINESS_EXPENSES	Administer Workforce, Administer Workforce (GBL), Use, Business Expenses, Business Expenses Administer Workforce, Administer Workforce (USF), Use2, Business Expenses, Business Expenses Administer Workforce, Administer Workforce (FPS), Use2, Business Expenses	Track an employee's business expenses, such as travel, meals, entertainment, and relocation costs.

Page Name	*Object Name*	*Navigation*	*Usage*
Prior Work Experience	PRIOR_WORK_EXPER	Administer Workforce, Administer Workforce (GBL), Use, Prior Work Experience, Prior Work Experience 1 Administer Workforce, Administer Workforce (FPS), Use2, Prior Work Experience	Enter the details of employees' previous employers and jobs.
Contact Address/Phone	EMERGENCY_CONTACT	Administer Workforce, Administer Workforce (GBL), Use, Emergency Contact, Contact Address/Phone Administer Workforce, Administer Workforce (USF), Use2, Emergency Contact, Contact Address/Phone Administer Workforce, Administer Workforce (FPS), Use2, Emergency Contact, Contact Address/Phone	Enter names, addresses, and primary phone information for people to contact in the event of an employee emergency.
Other Phone Numbers	EMERGENCY_CONTACT 2	Administer Workforce, Administer Workforce (GBL), Use, Emergency Contact, Other Phone Numbers Administer Workforce, Administer Workforce (USF), Use2, Emergency Contact, Other Phone Numbers Administer Workforce, Administer Workforce (FPS), Use2, Emergency Contact, Other Phone Numbers	Record additional phone numbers at which the emergency contact can be reached, such as a work or cellular phone number.

Page Name	*Object Name*	*Navigation*	*Usage*
Citizen Status	CITIZEN_STATUS	Administer Workforce, Administer Workforce (GBL), Setup, Citizen Status Table, Citizen Status Administer Workforce, Administer Workforce (FPS), Setup, Citizen Status Table, Citizen Status	Define the different types of citizenship you'll need to track for employees and dependents from various countries. For example, you may need to distinguish between a native, a naturalized citizen, or a permanent resident of a particular country.
Supporting Document Table	SUPPORT_DOC_TABLE	Administer Workforce, Administer Workforce (GBL), Setup, Supporting Document Table, Supporting Document Table Administer Workforce, Administer Workforce (FPS), Setup, Supporting Document Table	Set up codes for the types of documents required to obtain visas and permits for employees and their dependents, such as birth certificates, letters of employment, and marriage certificates.
Visa/Permit Table	VISA_PERMIT_TABLE	Administer Workforce, Administer Workforce (GBL), Setup, Visa/Permit Table, Visa/Permit Table Administer Workforce, Administer Workforce (FPS), Setup, Visa/Permit Table	Enter information on the types of visas and permit records that governments require for non-citizens to work in the countries where your organization does business. You must have previously defined the visa/permit classifications on the Supporting Document Table.

Page Name	Object Name	Navigation	Usage
Citizenship/Passport	CITIZEN_PASSPORT	Administer Workforce, Administer Workforce (GBL), Use, Identification Data, Citizenship/Passport Administer Workforce, Administer Workforce (USF), Use2, Identificatn Data, Citizenship/Passport Administer Workforce, Administer Workforce (FPS), Use2, Identification Data, Citizen/Passport	Track passport and citizenship information for employees. Enter multiple countries of citizenship and multiple passports for employees and their dependents.
Visa/Permit Data	VISA_PERMIT_DATA	Administer Workforce, Administer Workforce (GBL), Use, Identification Data, Visa/Permit Data Administer Workforce, Administer Workforce (USF), Use2, Identificatn Data, Visa/Permit Data Administer Workforce, Administer Workforce (FPS), Use2, Identification Data, Visa/Permit Data	Enter information on the visas and permits required for employees to live and work in the countries where your organization has operations.
Employee Photo	EMPLOYEE_PHOTO	Administer Workforce, Administer Workforce (GBL), Use, Identification Data, Employee Photo Administer Workforce, Administer Workforce (USF), Use2, Identificatn Data, Employee Photo Administer Workforce, Administer Workforce (FPS), Use2, Identification Data, Employee Photo	Copy and paste images into image fields for employees.

Page Name	*Object Name*	*Navigation*	*Usage*
Driver's License Type Tbl	DRIVE_LIC_TBL	Administer Workforce, Administer Workforce (GBL), Setup, Driver License Type Tbl Administer Workforce, Administer Workforce (FPS), Setup, Driver License Type Tbl	Enter the types of licenses you are tracking.
Driver's License Data	DRIVERS_LIC_GBL	Administer Workforce, Administer Workforce (GBL), Use, Driver's License Data, Drivers License Administer Workforce, Administer Workforce (USF), Use2, Driver's License Data, Drivers License Administer Workforce, Administer Workforce (FPS), Setup, Driver's License Data, Drivers License Data	Enter license numbers or other data from an employee's driving record.
Bank Account Information	PYE_BANKACCT	Administer Workforce, Administer Workforce (GBL), Use, Bank Accounts, Bank Account Information Administer Workforce, Administer Workforce (FPS), Use2, Bank Accounts, Bank Account Information	Record information about employee bank accounts. Use this information to track employee direct deposit information.
Building Society Details	PYE_BS_SP_UK	To access this page, click Other Required Information on the Bank Account Information page.	Enter an employee's building society roll number and name.

Page Name	Object Name	Navigation	Usage
Volunteer Organization Table	VOLUNTEER_ORG_TABL	Administer Workforce, Administer Workforce (GBL), Setup, Volunteer Organization Table, Volunteer Organization Table Administer Workforce, Administer Workforce (FPS), Setup, Volunteer Organization Table	Add volunteer organization data that your company recognizes or sponsors.
Volunteer Activities	VOLUNTEER_ACTIVITY	Administer Workforce, Administer Workforce (GBL), Use, Volunteer Activities, Volunteer Activities Administer Workforce, Administer Workforce (USF), Use2, Volunteer Activities, Volunteer Activities Administer Workforce, Administer Workforce (FPS), Use2, Volunteer Activities	Enter information on employee participation in community programs. Track multiple volunteer organizations for employees and multiple start dates with the same organization.
General Comments	GENL_COMMENTS	Administer Workforce, Administer Workforce (GBL), Use, General Comments, General Comments Administer Workforce, Administer Workforce (USF), Use2, General Comments, General Comments Administer Workforce, Administer Workforce (FPS), Use2, General Comments	Enter a miscellaneous comment about an employee that doesn't belong in any other page in PeopleSoft Human Resources.

Employee Photo Alternate Navigation

Develop Workforce, Plan Successions (GBL), Use, Candidate Photo

Develop Workforce, Plan Successions (USF), Use, Candidate Photo

Common Elements for Entering and Tracking Additional Employee Data

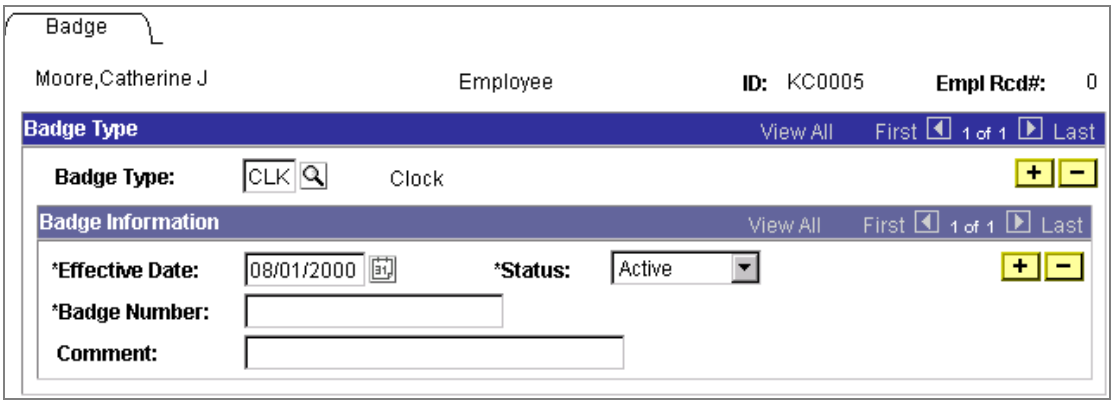
Expiration Date Enter the expiration date of the visa/permit.

Issue Date Enter the date on which the visa/permit was issued.

Issue Place Enter the location where the visa/permit was issued.

Tracking Badge Information

Access the Badge page.



Badge page

Badge Type Select the type of badge number you want to enter:

BA (Building Access)

CCA (Computer Center Access)

GB (General Badge)

PA (Parking Access)

Add more values if you want or enter more than one badge type for a particular employee and employment record number.

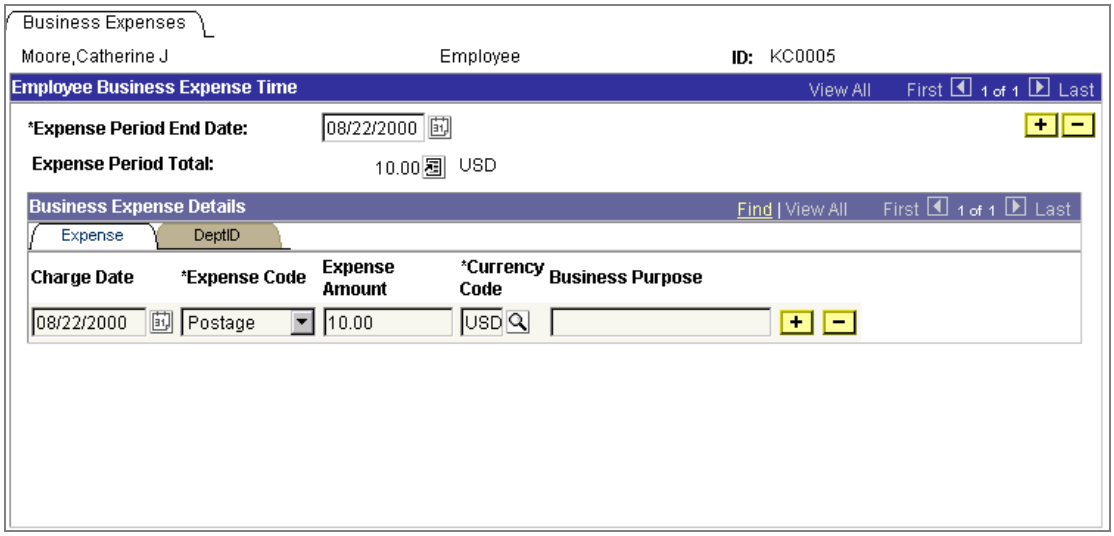
Badge Number Enter the badge number that corresponds to the badge type you selected. The system checks to make sure the number you enter isn't currently assigned to another employee. It also checks to make sure the number hasn't been assigned for future use by someone else.

For each badge type, only one badge number per employee and employment record number can be active at the same time. Badge numbers can be reused. If a certain badge type and badge number was previously assigned to an employee, but is currently inactive and hasn't been assigned for future use, you can use it for a different employee and employment record number.

Tracking Business Expenses

First, you must set up valid expense codes on the Translate table, user IDs on the Primary Permission List Preferences Table, currency codes on the Currency Code table, and departments on the Department table.

Access the Business Expenses page.



Business Expenses page

Expense Period End Date Enter the expense period end date for the period to which these expenses apply.

Charge Date Enter the date of the actual expense charge.

Expense Code Select an expense code, such as ***Airfare*** for the charge.

Expense Amount Enter the amount of the expense.

Currency Code Defaults to the to currency specified for your user ID on the Primary Permission List Preferences Table. If there is no To Currency for your user ID, then the system defaults in the base currency you specified for your implementation on the Installation table. Override the default currency if necessary using the values in the Currency Code table.

Business Expenses: DeptID Tab



Business Expenses: DeptID tab

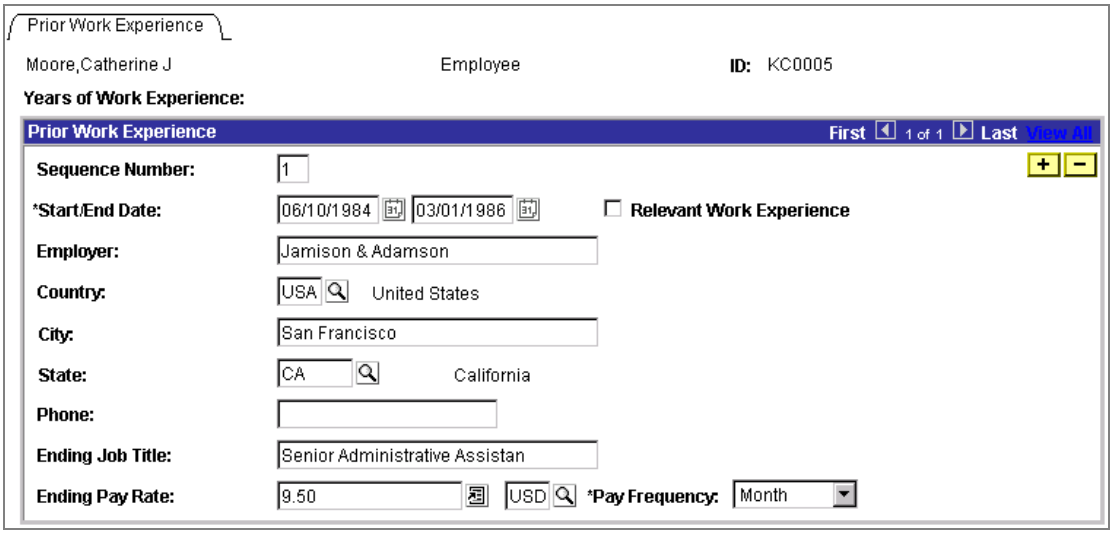
Business Unit	Enter the business unit to which the expense should be charged.
Department	Select the specific department to which the expense should be charged.

Warning! The information you enter here isn't related to PeopleSoft Payroll for North America processing of business expenses.

Tracking Prior Work Experience

If you've tracked an applicant through the Recruiting Employees business process in PeopleSoft Human Resources, the information you entered for an applicant becomes part of their employee record when you hire them. For other employees, entering this information helps you establish a complete employee profile for reporting purposes. It's also useful for career and succession planning.

Access the Prior Work Experience page.



Prior Work Experience page

Sequence Number	Enter a sequence number for each prior work experience record.
Years of Work Experience	The system calculates this value if you select the Relevant Work Experience check box. If so, you must enter a start date and end date.
Employer	Enter the name of the employee's previous employer.
Start Date and **End Date**	Enter the beginning and end of the employee's tenure with the employer.
Ending Job Title	Enter the title in which the employee ended employment.

Ending Pay Rate	Enter the pay rate at which the employee ended employment.
Relevant Work Experience	Select if the experience was relevant to the employee's responsibilities with your organization.
Frequency	The pay **Frequency** field defaults to ***Month,*** which you can change if the pay amount reflects a different frequency.

See Also

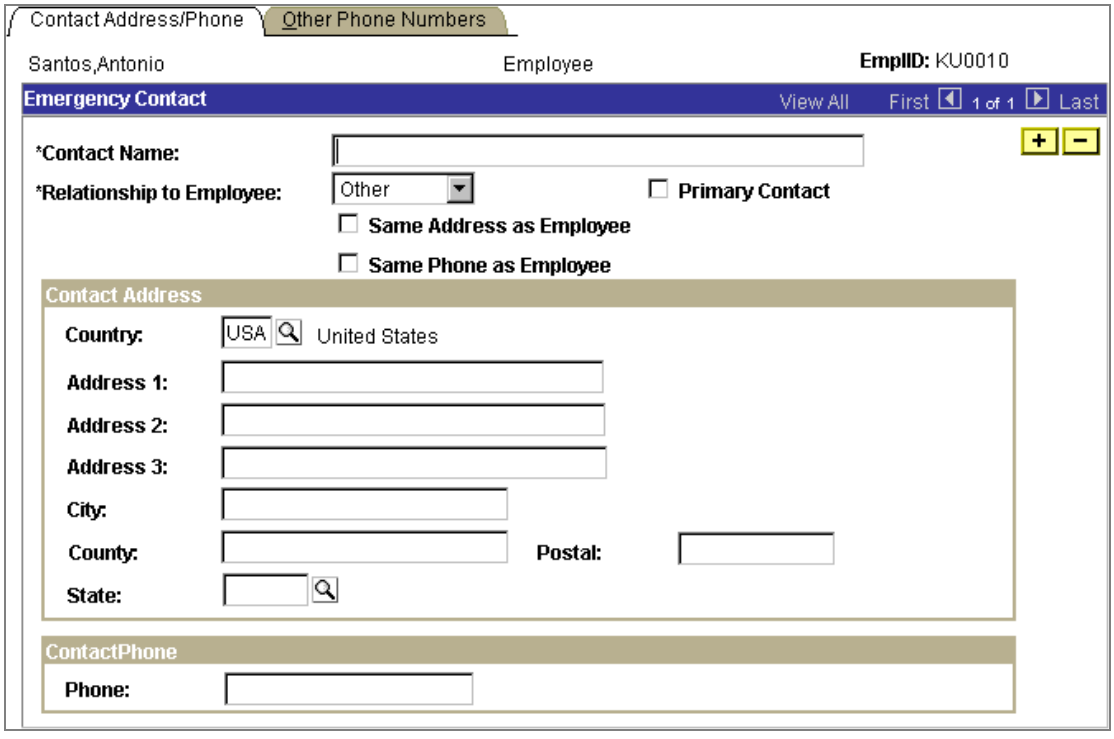
PeopleSoft Human Resources PeopleBook: Plan Careers and Successions, "Planning Careers"

PeopleSoft Human Resources PeopleBook: Recruit Workforce, "Setting Up Recruit Workforce"

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Appendix: PeopleSoft Application Fundamentals for HRMS Reports," Administer Workforce Reports

Entering Primary Address and Phone Information

Access the Contact Address/Phone page.

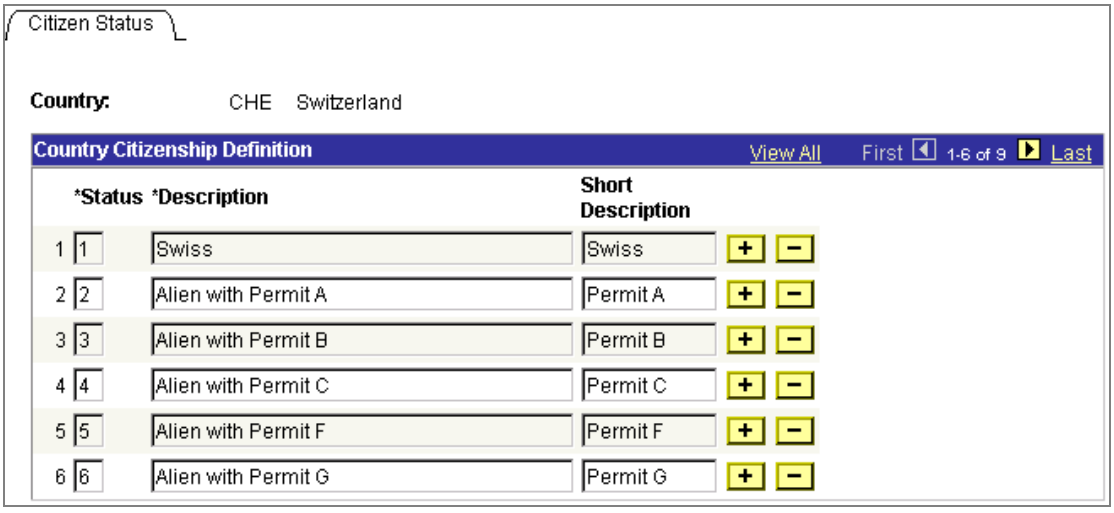


Emergency Contact - Contact Address/Phone page

Contact Name	Enter the name of the emergency contact person.
Relationship to Employee	Select the option that indicates the contact's relationship to the employee.
Primary Contact	Select this check box if this is the *first* person you should try to contact in an emergency. Select this check box for only one contact.
Same Address as Employee	Select if the dependent has the same address information as the employee. If selected, you don't need to complete any of the address fields.
Address Type	Select the employee address type that is the same as this beneficiary's.
Same Phone as Employee	Select if the dependent has the same phone information as the employee. If selected, you don't need to complete any of the phone fields. A beneficiary can have the same address as the employee but a different phone number.
Phone Type	Select the employee phone type that is the same as this beneficiary's.
Contact Address	Enter the dependent's contact address information in the Contact Address group box.
Contact Phone	Enter the dependent's contact phone information in the Contact Phone group box.

Defining Citizen Status

Access the Citizen Status page.



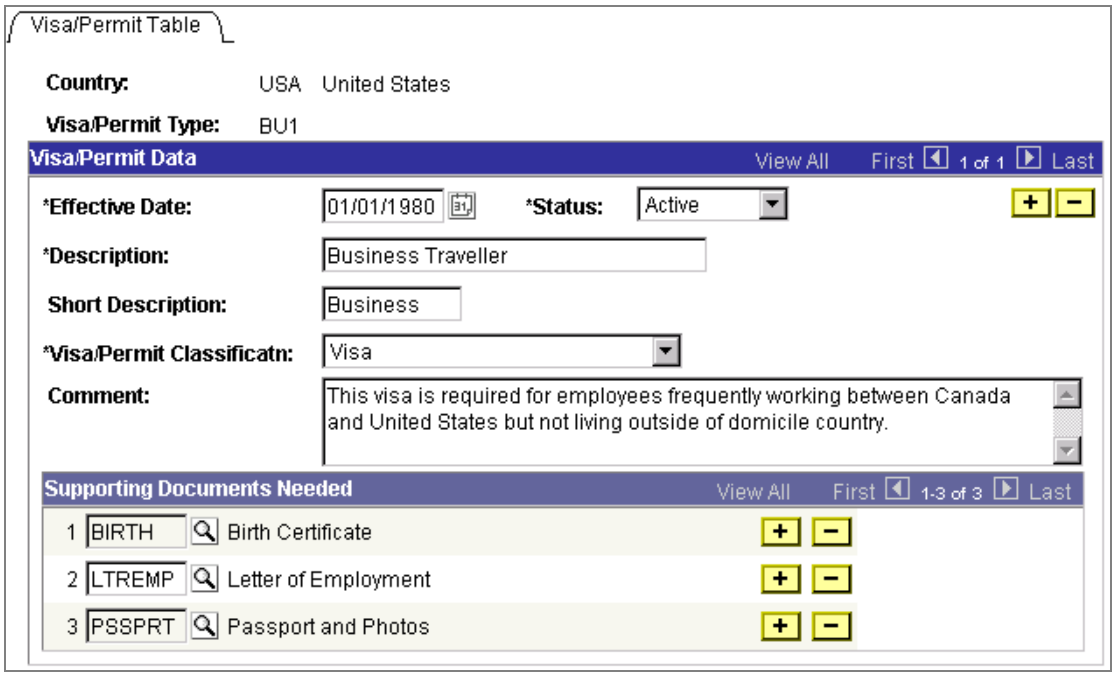
Citizen Status page

Country The system displays the country code you entered to access the page. Define citizenship status codes for this country.

Status Enter the citizenship status code that you want to define. Enter as many citizenship codes as needed.

Adding Visas and Work Permits

Access the Visa/Permit Table page.



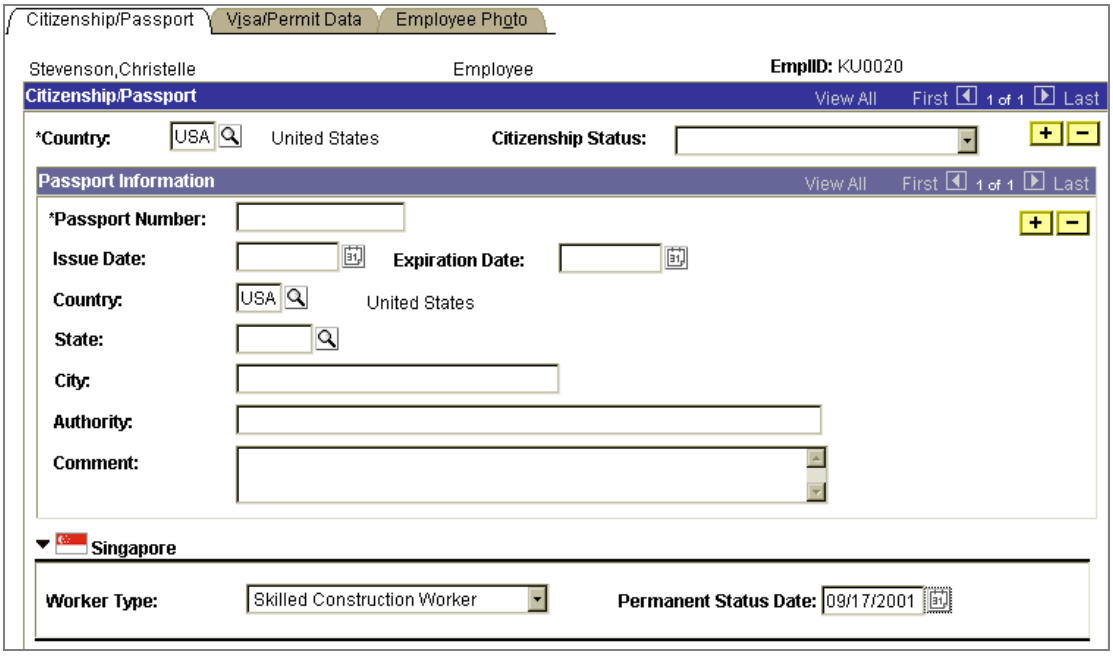
Visa/Permit Table page

Visa/Permit Classificatn (Visa/Permit Classification) Select the appropriate visa/permit classification, if applicable.

Supporting Documents Needed Select the appropriate supporting documents needed to obtain the visa or permit.

Tracking Employee Passport and Citizenship Information

Access the Identification Data - Citizenship/Passport page.



Identification Data - Citizenship/Passport page

Citizenship Status Indicate the worker's citizenship status. A worker's birth country and country of citizenship can be different. To track *birth* country information, use the Identity/Diversity page.

(GER) Note. If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive. This information is used in DEUEV processing and DEUEV reporting for German organizations or companies doing business in Germany. DEUEV processes and reporting are available only if you are using a German compliant payroll system.

Passport Information

Passport Number Enter the passport number.

Authority Enter the issuing authority, such as the U.S. Passport Agency.

Note. Also find these pages in the Tracking Global Assignments module. Add or update information for your employees using the Identification Data pages in either menu. The pages are identical.

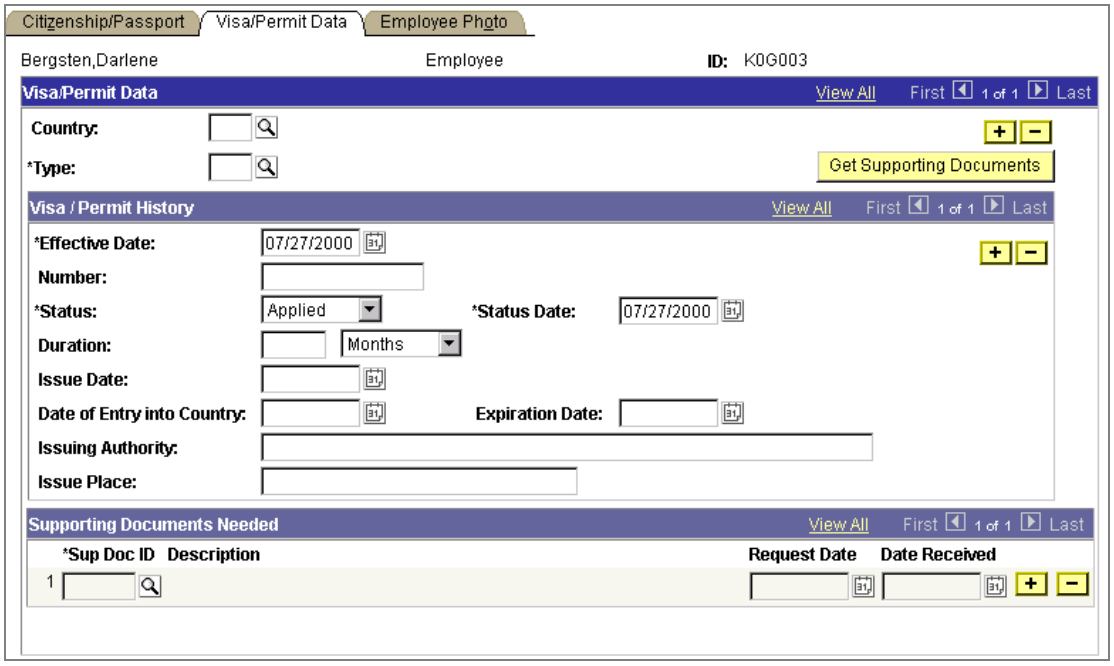
See Also

PeopleSoft Global Payroll for Germany PeopleBook, "Setting Up PeopleSoft Global Payroll for Germany"

PeopleSoft Human Resources PeopleBook: Track Global Assignments, "Setting Up Basic Assignment Information"

Entering Country-Specific Information on Visas and Permits

Access the Identification Data - Visa/Permit Data page.



Identification Data - Visa/Permit Data page

Type Select a type of visa/permit. The system prompts you with only types associated with the country you've selected.

Get Supporting Documents Click to have the system enter a list of the appropriate supporting documents needed to obtain the visa or permit type you entered.

Status Select the visa/permit status: ***Applied, Granted, Renewal,*** and ***Renewed.***

Number Enter the visa/permit number.

Status Date Enter the date on which the status of the visa/permit changed.

Entry Date Enter the date on which the employee entered the country.

Duration Enter the number of days, months, or years that the employee stayed in the country. Select the unit of duration (***Days, Months,*** or ***Years***) in the adjacent field.

Issuing Authority	Enter the agency that issued the visa or permit, such as the U.S. Department of State or the French Consulate.

Supporting Documents Needed

Sup Doc ID (supporting document ID)	If additional documents are required for this employee, select a supporting document ID.
Date Requested	Enter the date on which the documents were requested.
Date Received	Enter the date on which the documents were received.

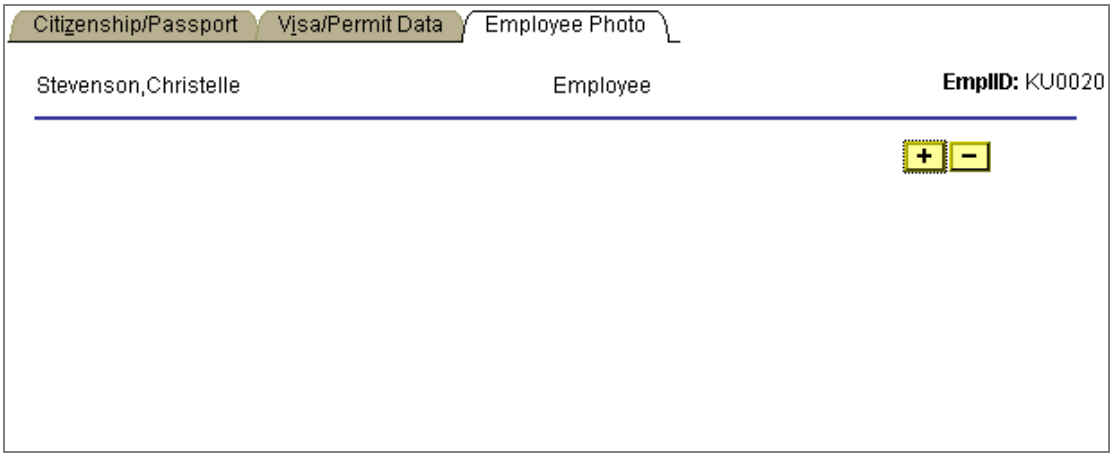
Note. If you're administering a workforce in Germany, use the Visa/Permit Table to record OECD work permits for OECD nationals who want to work in a protected industry. Because permit types are keyed by country, if you're tracking a German employee's OECD work permit information on the Identification - Visa/Permit Table page in the Administer Workforce menus, select ***DEU*** as the Country Code to select from among your valid OECD permit types.

See Also

"Setting Up Country-Specific Tables," Entering German Nation Deuev Codes

Copying and Pasting Employee Images Into Image Fields

Access the Identification Data - Employee Photo page.



Identification Data - Employee Photo page

Before you insert an image (such as an employee photograph) in PeopleSoft Human Resources, use a Windows-based graphics or drawing program to capture (and edit if necessary) the image or scanned photograph you want to insert. Then use the Windows-based program to highlight the image or portion of it you want to copy, and copy it to the Microsoft Windows clipboard. In most drawing programs, you can do this by selecting **Edit, Copy,** or pressing **CTRL+C**.

Click or tab to the image field and select **Edit, Paste,** or press **CTRL+V** to paste the image in the field. Use the Add button to browse for and upload a picture (such as Bitmap or .bmp files).

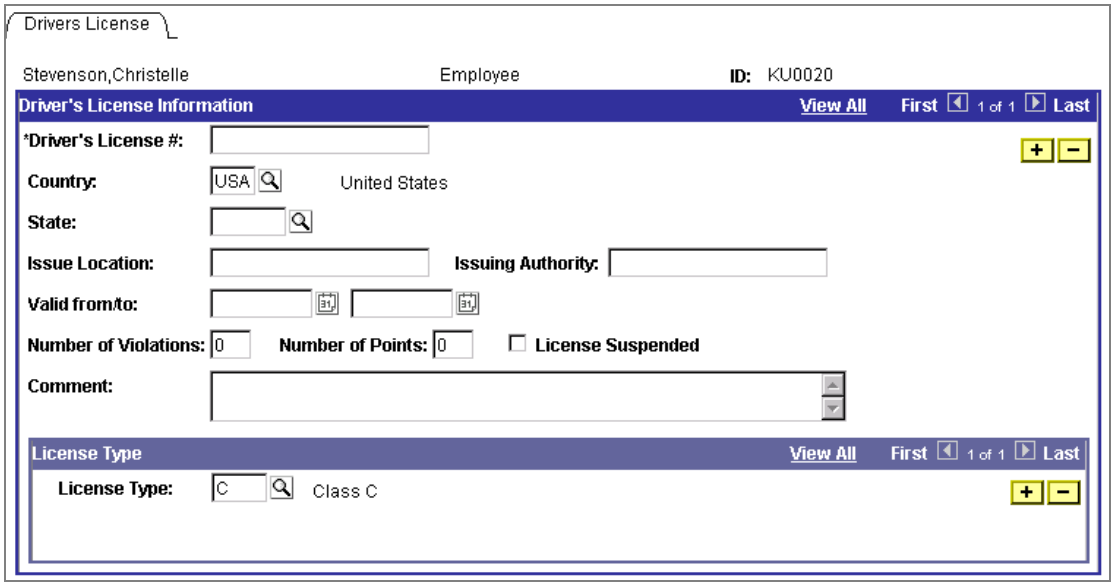
Note. Full imaging capabilities may not be supported on all database platforms.

See Also

PeopleTools PeopleBook: Application Designer

Entering License Numbers and Other Driving Record Information

Access the Driver's License Data page.



Driver's License Data page

Driver's License # (Driver's License Number) — Enter the license number.

Issue Location — Enter the location where the license was issued.

Issuing Authority — Enter the agency that issued the driver's license, such as the Department of Motor Vehicles.

Valid from/to — Enter the dates on which the driver's license remains valid. The *to* date must be in the future.

Number of Violations — Enter the number of traffic violations cited on the employee's driving record.

Number of Points — Enter the number of points accumulated on the employee's driving record.

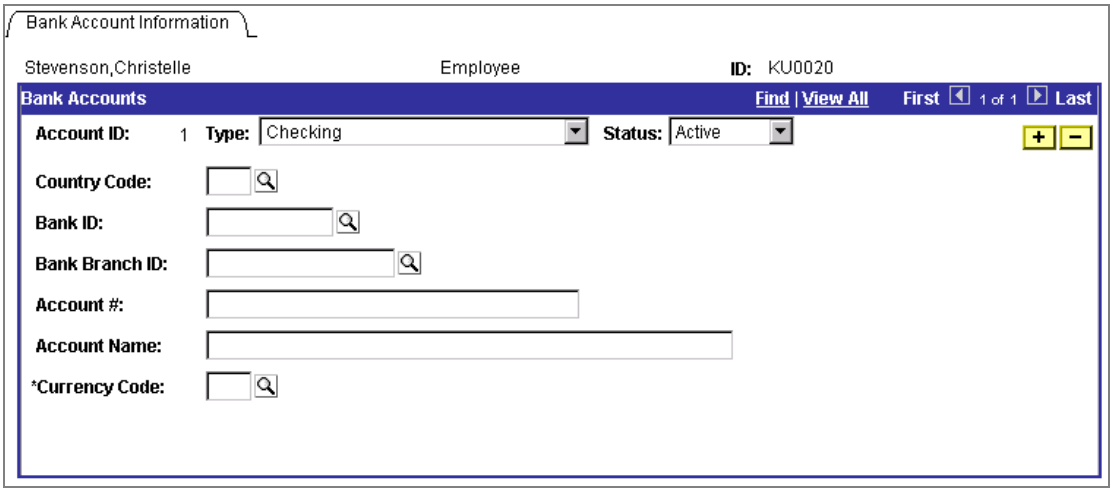
License Suspended Select this check box if the employee's driver's license is currently suspended.

License Type Enter the type of license held by the employee.

If you need to enter more than one driver's license for an employee, add a new data row.

Recording Employee Bank Account Information

Access the Bank Account Information page.



Bank Account Information page

Note. Before you can enter an employee's bank details, first set up the bank branch or building society on the Bank/Branch Table page.

Account ID The system creates an account ID when you enter a new bank or building society account for an employee. This field is for information only.

Type Select the type of account you are tracking.

Country Code Enter the country where the bank account is located. When you move out of this field, the system populates the **Currency Code** field with the appropriate currency.

Bank ID Enter the bank ID.

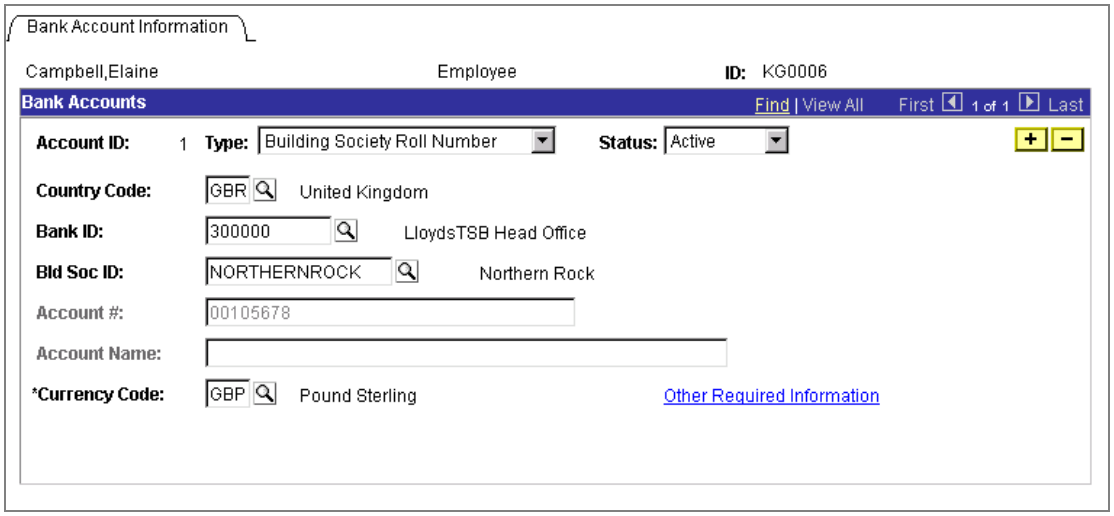
Bank Branch ID Enter the bank branch ID for the account.

Account # (account number) Enter the account number.

Account Name Enter the account name.

(GBR) Entering Banking Information for UK Employees

UK customers also use this page to record employees' building society account information. When you enter ***GBR*** in the **Country** field, the Bank Account Information page appears, as follows:



Example of UK Bank Account Information page

UK customers entering details of UK bank and building society accounts should enter the following information in the fields on the Bank Account Information page:

Field	*UK Bank and Building Society Information*
Type	Select an account type: ***Current Account:*** Select for a bank account. ***Building Society Roll Number:*** Select for a building society account. ***Savings:*** Not applicable to the UK. ***Checking:*** Not applicable to the UK.
Country Code	Enter ***GBR.***
Bank ID	If the employee has a bank account, select the bank branch from the list of branches set up in the Bank table. If the employee has a building society account, leave this field blank
Bld Soc ID (building society ID)	If the employee has a building society account, select the building society from the list of societies set up in the Branch table. When you select a building society, the system automatically completes **Bank ID** with the bank that handles clearing for the selected building society. If the employee has a bank account, leave **Bld Soc ID** blank.

Field	*UK Bank and Building Society Information*
Account # (account number)	Enter the employee's bank account number. If you selected a building society in **Bld Soc ID,** the system automatically completes **Account #** with the building society's account at the clearing bank and makes the field unavailable for entry. **Note.** To enter the employee's building society account details, click **Other Required Information.**
Account Name	Enter the account name. If you selected a building society in **Bld Soc ID,** the system makes this field unavailable for entry. Click **Other Required Information** to display the Building Society Details page where you enter the account name.
Currency Code	The system defaults the currency code to ***GBP*** (Pound Sterling). Override this default if necessary.
Other Required Information	Click to display the Building Society Details page where you enter the employee's building society account details. The system does not display this link if you select a normal bank branch in the **Bank ID** field.

Note. For more information about the account number formats for a country, see the corresponding PeopleSoft Global Payroll local country documentation.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Banks and Bank Branches"

Enter an Employee's Building Society Roll Number and Name

Access the Building Society Details page.



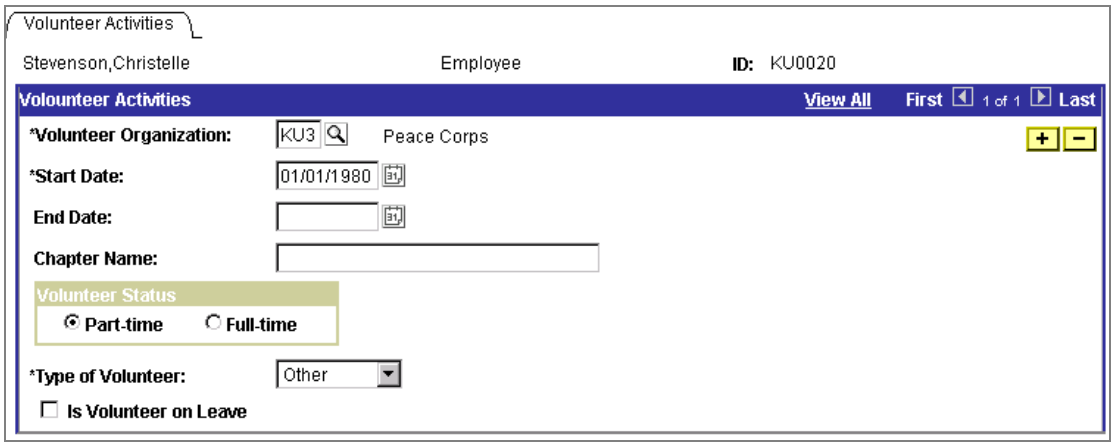
Building Society Details page

Roll Name Enter the roll name of the employee's building society account.

Roll Number Enter the employee's building society account number.

Entering Volunteer Activities

Access the Volunteer Activities page.



Volunteer Activities page

Volunteer Organization Select a volunteer organization code.

Start Date and **End Date** Enter the start and end date of the employee participation.

Volunteer Status Select either the **Part Time** or **Full Time** option to indicate the volunteer status.

Type of Volunteer Select the type of volunteer activity in which the employee is participating: ***Administr, Canvasser, Executive, Fund Raise,*** or ***Other.***

Is Volunteer on Leave Select if the volunteer is on leave.

Note. This check box is for informational purposes only. If you select this check box, you don't affect any Monitor Absences business process functionality.

Note. This information is useful when you need to know about employee additional skills and knowledge, and when you measure the effectiveness of company-sponsored volunteer and charitable programs.

CHAPTER 8

(JPN) Tracking Intercompany Transfers (*Shukkou*)

This chapter discusses the tracking of Japanese intercompany transfers and shows you how to:

- Set up intercompany transfers.
- Enter and maintain home/host data for intercompany transfers.
- Work with search page security.

Understanding the Tracking of Intercompany Transfers

Whenever you need to track intercompany transfers (*shukkou*), whether as a home company or a host company, you enter a new job record with standard actions such as transfer, retirement, and hire, but with specific intercompany transfer-related action reasons.

Selecting Actions and Reasons for Intercompany Transfers

These are the actions and reasons that you use in the Administer Workforce pages when you deal with intercompany transfers.

Action	*Reason*
Transfer	Intercompany Transfer
	Completion of Intercompany Transfer
Retirement	Permanent Intercompany Transfer
	Completion of (hosted) Intercompany Transfer.
Hire	Temporary Company Transfer
	Permanent Intercompany transfer

Setting the Home or Host Compensation Owner Indicator

You can use the Pay Group on Job Data - Payroll page to identify whether the home or the host company is responsible for paying an employee on temporary intercompany transfer. If the home company is paying, put the employee in a pay group with other employees. If the

host company is paying, put the employee in a designated ”dummy” pay group that has no payroll processing implications for your (home) company.

Similarly, if you are the host for a temporary intercompany transfer, put the employee in a pay group if you are paying the employee or into a designated dummy pay group if the home company is paying the employee.

Note. When Payroll System is set to *Other* on the Job Data - Payroll page, the Pay Group field is not a required field. You can use the field as described previously whether it is required or not.

Summarizing Home/Host Data for Intercompany Transfers

The diagrams in the two sections that follow provide summarized data entry obligations and requirements for different intercompany transfer scenarios. The first deals only with the hosting of intercompany transfers, the second with both temporary and permanent intercompany transfers.

After these two sections, we provide a series of scenarios.

Key to abbreviations used in the two diagrams:

TICT	Temporary Intercompany Transfer	Zaiseki-Shukkouv
PICT	Permanent Intercompany Transfer	Tenseki-Shukkou
HICT	Hosting Intercompany Transfer	Shukkou-Ukeire
HTICT	Hosting Temporary Intercompany Transfer	Zaisekki-Shukkou no Ukeire
HPICT	Hosting Permanent Intercompany Transfer	Tenseki-Shukkou no Ukeire
SL	Supervisor Level	Yakushoku

Hosting Temporary and Permanent Intercompany Transfers

The following chart summarizes the information and security requirements for hosting temporary intercompany transfers to companies within a group that uses PeopleSoft HRMS and companies that don’t use PeopleSoft HRMS.

ICT Type	PA Location	Information required and security for ICT within affiliated companies that use PeopleSoft HRMS	Information required and security for ICT to affiliated companies not using PeopleSoft HRMS
1 HTICT	Host (Own Company)	• Host company information using shared codes (in case of PS group-Company). • The owner of payroll. • ICT period, department and SL, and so on. • In general, employee information is maintained at host (own) company when PA is moved from his or her home company.	• Host company information (Company name, department name, and so on). • The owner of payroll. • ICT period.
2 HPICT	Host (Own Company)	• Employee information is maintained at host (own) company only.	• His or her host company information (company name, department name, and do on).

Hosting temporary and permanent intercompany transfers summarized

Temporary and Permanent Intercompany Transfers

The chart in this section summarizes the information and security requirements for temporary intercompany transfers to companies within a group that uses PeopleSoft HRMS and companies that don't use PeopleSoft HRMS.

ICT Type	PA Location	AA at Home Company?	Information required and security for ICT within affiliated companies that use Peop;leSoft HRMS	Information required and security for ICT to affiliated companies not using PeopleSoft HRMS
Temporary Intercompany Transfer	Host	No	• Host company information using shared codes (in case of PS-using group-company). • The owner of payroll. • TICT period, department, supervisor level, and so on. • In general, employee information would be maintained at host company when PA moved from a home company.	• Host company information (company name, department name and so on. • The owner of payroll. • TICT period.
Permanent Intercompany Transfer	N/A Retire	N/A	• Employee information will be maintained at host company only.	N/A

Temporary and permanent intercompany transfers summarized

Setting Up Intercompany Transfers

To set up intercompany transfers for Japan:

1. Set up company and department codes for intercompany transfers.
2. Set up supervisor level codes for intercompany transfers.
3. Enter intercompany transfer data on the Work Location page of the Job Data Component.

See Also

"Hiring Your Workforce," Entering Employee Job Information

Pages Used to Set Up Intercompany Transfer Codes

Page Name	*Object Name*	*Navigation*	*Usage*
JPN IC Transfer Company/Dept	INTCPX_CPY_JPN	Define Business Rules, Manage Human Resources (GBL), Setup Lcl, JPN IC Transfer Company/Dept	Set up company and department codes for intercompany transfers.
JPN IC Transfer Supervisor Lvl	INTCPX_SPV_JPN	Define Business Rules, Manage Human Resources (GBL), Setup Lcl, JPN IC Transfer Supervisor Lvl	Set up supervisor level codes for intercompany transfers.

Entering and Maintaining Home/Host Data for Intercompany Transfers

The following three scenarios detail the data input and maintenance requirements by the home or host company as indicated. Sets B and C are similar, but reflect different security conditions.

The three scenario sets are:

1. Set A: Single Company Using a Single PeopleSoft HRMS Database.
2. Set B: Multiple Companies Using a Single PeopleSoft HRMS Database (with security restrictions).
3. Set C: Multiple Companies Using Single PeopleSoft HRMS Database (without security restrictions).

Single Company Using Single HR Database: Scenarios A1-8

Note. Concurrent Jobs isn't used for any scenarios in Set A. Also, the scenarios in Set A are applicable where multiple companies use a single HR database but the information—for the home or host company relevant to a particular intercompany transfer—is not stored in that database.

Scenario A1: Temporary Intercompany Transfer (TICT)

Home Company Inputs

Table	*Fields*	*Input*
JOB	Action	Transfer.
	Reason	Temporary Intercompany Transfer.
	Department ID	Department ID that indicates Temporary Intercompany Transfer.
	Pay Group	If home (own) company responsible for compensation, no change to pay group. If not, enter dummy pay group to indicate that the host (other) company is responsible for compensation. There is no processing associated with dummy pay groups.
INTCPNY_TRN_JPN	Intercompany Transfer Flag	Host Company Information.
	Business Unit (code)	If code in your database, enter code. If not, leave blank.
	Company: code or manual description	If code in your database, enter code. If not, enter a manual description.
	Department: code or manual description	If code in your database enter code. If not, enter a manual description.
	Sup Lvl ID: code or manual description	If code in your database, enter code. If not, enter a manual description.
	ICT Start Date	Actual start date of intercompany transfer (ICT).
	ICT End Date	Expected end date of ICT.

Host Company Inputs

Not applicable.

Scenario A2: Completion of TICT

Home Company Inputs

Table	*Fields*	*Input*
JOB	Action	Transfer.
	Reason	Completion of ICT.
	Department ID	Home company department employee will be in.
	Pay Group	Home company pay group employee will be in.

Table	Fields	Input
INTCPNY_TRN_JPN	N/A	The system deletes the row that has the same key values as the JOB table, with *Transfer* as the Action value and *Completion of Intercompany Transfer* as the Action Reason value.

Host Company Inputs

Not applicable.

Scenario A3: Permanent Intercompany Transfer (PICT)

Home Company Inputs

Table	Fields	Input
Job	Action	Retirement.
	Reason	Permanent Intercompany Transfer.
INTCPNY_TRN_JPN	Intercompany Transfer Flag	Host Company Information.
	Business Unit (code)	If code in your database, enter code. If not, leave blank.
	Company: code or manual description	If code in your database, enter code. If not, enter a manual description.
	Department: code or manual description	If code in your database, enter code. If not, enter a manual description.
	Sup Lvl ID: code or manual description	If code in your database, enter code. If not, enter a manual description.

Host Company Inputs

Not applicable.

Scenario A4: Hosting Temporary Intercompany Transfer (TICT)

Home Company Inputs

Not applicable.

Host Company Inputs

Table	Fields	Input
JOB	Action	Hire.
	Reason	Temporary Intercompany Transfer.

Table	Fields	Input
	Pay Group	If host (own) company responsible for compensation, enter pay group that you want the employee in. If not, enter dummy pay group to indicate that the home (other) company is responsible for compensation.
	Employee Class	Hosting Intercompany Transfer.
INTCPNY_TRN_JPN	Intercompany Transfer Flag	Home Company Information.
	Business Unit (code)	If code in your database, enter code. If not, leave blank.
	Company: code or manual description	If code in your database, enter code. If not, enter a manual description.
	Department: code or manual description	If code in your database, enter code. If not, enter a manual description.
	Sup Lvl ID: code or manual description	If code in your database, enter code. If not, enter a manual description.
	ICT Start Date	Actual start date of intercompany transfer (ICT).
	ICT End Date	Expected end date of ICT.

Scenario A5: Completion of Hosting TICT

Home Company Inputs

Not applicable.

Host Company Inputs

Table	Fields	Input
JOB	Action	Retirement
	Reason	Completion of TICT
INTCPNY_TRN_JPN	N/A	The system deletes the row that has the same key values as the JOB table, with *Retirement* as the Action value and *Completion of Temporary Intercompany Transfer* as the Action Reason value

Scenario A6: Hosting Permanent Intercompany Transfer (PICT)

Home Company Inputs

Not applicable.

Host Company Inputs

Table	*Fields*	*Input*
JOB	Action	Hire.
	Reason	Permanent Intercompany Transfer.
	Pay Group	Pay group that you want this employee in.
	Employee Class	Hosting Intercompany Transfer.
INTCPNY_TRN_JPN	Intercompany Transfer Flag	Home Company Information.
	Business Unit (code)	If code in your database, enter code. If not, leave blank.
	Company: code or manual description	If code in your database, enter code. If not, enter a manual description.
	Department: code or manual description	If code in your database, enter code. If not, enter a manual description.
	Sup Lvl ID: code or manual description	If code in your database, enter code. If not, enter a manual description.

Multiple Companies Using Single HR Database: Scenarios B1-6

Note. Concurrent Jobs is used for all scenarios in Set B.

Conditions:

- Both home and host companies use the same database and Business Unit, Company, Department ID, and Supervisor Level ID.
- Security settings make it impossible for either company to access the other's information.

Scenario B1: Temporary Intercompany Transfer

Home Company Inputs (Temporary Intercompany Transfer - TICT)

Table	*Fields*	*Input*
JOB	Action	Transfer.
	Reason	Temporary Intercompany Transfer.
	Department ID	Dummy ID that indicates Temporary Intercompany Transfer.

Table	Fields	Input
	Pay Group	If home (own) company is responsible for compensation, no change to pay group. If not, enter dummy pay group to indicate that the host (other) company is responsible for compensation. There is no processing associated with dummy pay groups.
	Job Indicator	Because host company enters information using concurrent jobs functionality, it is *Secondary*.
INTCPNY_TRN_JPN	Intercompany Transfer Flag	Host Company Information.
	Business Unit (code)	Business unit that employee will be sent to.
	Company (code)	Host company that employee will be sent to.
	Department ID (code)	Host department that employee will be in.
	Sup Lvl ID: code	Supervisor level that employee will take in host company.
	ICT Start Date	Actual start date of intercompany transfer (ICT).
	ICT End Date	Expected end date of ICT.

Host Company Inputs (Hosting Temporary Intercompany Transfer - TICT)

Table	Fields	Input
JOB	Employee ID	If accessing through Concurrent Jobs or Job Data, use the same Employee ID as home company. If accessing through Hire, assign a new ID.
	Employee Record #	Employee ID is *1* or higher.
	Action	Hire.
	Reason	Temporary Intercompany Transfer.
	Company	Host company.
	Department ID	Host department that employee will be in.
	Pay Group	If host (own) company is responsible for compensation, pay group that you want this employee in. If not, enter dummy pay group to indicate that the home (other) company is responsible for compensation.
	Employee Class	Hosting Intercompany Transfer.
	Job Indicator	Primary.
INTCPNY_TRN_JPN	Intercompany Transfer Flag	Home Company Information.

Table	Fields	Input
	Business Unit (code)	Business unit employee comes from.
	Company (code)	Employee's home company.
	Department ID (code)	Employee's home department.
	ICT Start Date	Actual start date of intercompany transfer (ICT).
	ICT End Date	Expected end date of ICT.

Scenario B2: Completion of Temporary Intercompany Transfer

Home Company Inputs (Completion of Temporary Intercompany Transfer)

Table	Fields	Input
JOB	Action	Transfer.
	Reason	Completion of Temporary Intercompany Transfer.
	Department ID	Home company department that employee will be in.
	Pay Group	Pay group for own company to be responsible for compensation.
	Job Indicator	Primary.
INTCPNY_TRN_JPN	N/A	The system deletes the row that has the same key values as the JOB table, with *Transfer* as the Action value and *Completion of Intercompany Transfer* as the Action Reason value.
ADD_APPT_JPN	N/A	The system carries forward any existing additional appointment information.

Host Company Inputs (Completion of Hosting Temporary Intercompany Transfer)

Table	Fields	Input
JOB	Action	Retirement.
	Reason	Completion of Temporary Intercompany Transfer.
	Job Indicator	Secondary.
INTCPNY_TRN_JPN	N/A	The system deletes the row that has the same key values as the JOB table, with *Retirement* as the Action value and *Completion of Intercompany Transfer* as the Action Reason value.
ADD_APPT_JPN	Update as required.	

Scenario B3: Permanent Intercompany Transfer

Home Company Inputs (Permanent Intercompany Transfer – PICT)

Table	*Fields*	*Input*
JOB	Action	Retirement.
	Reason	Permanent Intercompany Transfer.
	Job Indicator	Because the host company entered information using concurrent jobs functionality, it is *Secondary.*
INTCPNY_TRN_JPN	Intercompany Transfer Flag	Host company information.
	Business Unit (code)	Business Unit that employee is transferring to.
	Company (code)	Host company that employee is transferring to.
	Department ID (code)	Host department that employee will be in.
	Sup Lvl ID (code)	Supervisor level that employee will have in host company.

Host Company Inputs (Hosting Permanent Intercompany Transfer - PICT)

Table	*Fields*	*Input*
JOB	Employee ID	If accessing through Concurrent Jobs or Job Data, use same Employee ID as home company. If accessing through Hire, assign new ID.
	Employee Record #	If accessing through Concurrent Jobs, Employee ID is *1* or higher.
	Action	Hire.
	Reason	Permanent Intercompany Transfer.
	Pay Group	Regular host company pay group that employee is to be in.
	Employee Class	Hosting intercompany Transfer.
	Job Indicator	Primary.
INTCPNY_TRN_JPN	Intercompany Transfer Flag	Home Company Information.
	Business Unit (code)	Business unit that employee comes from.
	Company (code)	Home company that employee belong to.
	Department ID (code)	Home department that employee was in.

Multiple Companies Using Single HRMS Database: Scenarios C1-6

Note. Concurrent Jobs is used for all scenarios in Set C.

Conditions:

- Both home and host companies use the same database and Business Unit, Company, Department ID, and Supervisor Level ID.
- Security settings allow all companies to access each other's information.

Scenario C1: Temporary Intercompany Transfer

Home Company Inputs (Temporary Intercompany Transfer - TICT)

Table	*Fields*	*Input*
JOB	Action	Transfer.
	Reason	Temporary Intercompany Transfer.
	Department ID	Dummy ID that indicates Temporary Intercompany Transfer.
	Pay Group	If home (own) company is responsible for compensation, no change to pay group. If not, enter dummy pay group to indicate that the host (other) company is responsible for compensation.
	Job Indicator	Because host company enters information using concurrent jobs functionality, it is *Secondary*.
INTCPNY_TRN_JPN	Intercompany Transfer Flag	Host Company Information.
	ICT Start Date	Actual start date of intercompany transfer (ICT).
	ICT End Date	Expected end date of ICT.

Host Company Inputs (Hosting Temporary Intercompany Transfer - TICT)

Table	*Fields*	*Input*
JOB	Employee ID	If accessing through Concurrent Jobs or Job Data, use same Employee ID as home company. If accessing through Hire, assign new ID.
	Employee Record #	If accessing through Concurrent Jobs, Employee ID is *1* or higher.
	Action	Hire.
	Reason	Temporary Intercompany Transfer.

Table	Fields	Input
	Company	Host company.
	Department ID	Host department that employee will be in.
	Pay Group	If host (own) company is responsible for compensation, pay group that you want this employee in. If not, enter dummy pay group to indicate that the home (other) company is responsible for compensation.
	Employee Class	Hosting Intercompany Transfer.
	Job Indicator	Primary.
INTCPNY_TRN_JPN	Intercompany Transfer Flag	Home Company Information.
	ICT Start Date	Actual start date of intercompany transfer (ICT).
	ICT End Date	Expected end date of ICT.

Scenario C2: Completion of Temporary Intercompany Transfer: see Scenario B2: Completion of Temporary Intercompany Transfer]

Scenario C3: Permanent Intercompany Transfer

Home Company Inputs (Permanent Intercompany Transfer - PICT)

Table	Fields	Input
JOB	Action	Retirement.
	Reason	Permanent Intercompany Transfer.
	Job Indicator	Because host company entered information using concurrent jobs functionality, it is *Secondary.*
INTCPNY_TRN_JPN	Intercompany Transfer Flag	Host company information.

Host Company Inputs (Hosting Permanent Intercompany Transfer - PICT)

Table	Fields	Input
JOB	Employee ID	If accessing through Concurrent Jobs or Job Data, use same Employee ID as home company. If accessing through Hire, assign new ID.
	Employee Record #	If accessing through Concurrent Jobs, Employee ID is *1* or higher.
	Action	Hire.
	Reason	Permanent Intercompany Transfer.

Table	*Fields*	*Input*
	Pay Group	Regular host company pay group that employee is to be in.
	Employee Class	Hosting Intercompany Transfer.
	Job Indicator	Primary.
INTCPNY_TRN_JPN	Intercompany Transfer Flag	Home Company Information.

Working With Search Page Security

This section describes how department security (Search Page Security on PERS_SRCH_GBL and EMPLMT_SRCH_GLB) works when you use the system's Multiple Jobs functionality.

Note. There are many different ways to set up this security and your specific business requirements will determine the way you set up yours. What we describe here is just one example of the way you may set up your security.

First, we make the following assumptions.

- You want to manage two companies in one database: Company A and Company B where Company B is a subsidiary of Company A.
- The entire organization of Company A belongs to Business Unit A (BUA) and the entire organization of Company B belongs to Business Unit B (BUB).
- You have defined two SetIDs: SIDA and SIDB for Companies A and B respectively.
- Neither companies' employees have meaningful IDs (EmplIDs); that is, you can't tell from the ID which company an employee is in. For example, an employee with EmplID 1002 may belong to Company B, whereas employees with EmplIDs 1001 and 1003 belong to Company A.
- There are two Users: USR1 and USR2. USR1 has the right to access the Sales department of Company A and USR2 has the right to access the Sales department of Company B.

Following these assumptions, the next table represents the Job rows for employee 1001 who:

- Was originally hired by Company A.
- Went on an temporary intercompany transfer to Company B (Scenario B1).
- Returned to Company A (Scenario B3).
- Went on permanent intercompany transfer to Company B (Scenario B6).

Key: In the table Empl Rec# = Employment Record Number; Co. = Company;
ICT = InterCompany Transfer; A/R = Action/Reason; D = Department; J = Job Indicator.

Event	*Empl Rec#0*	*Empl Rec#1*
1. Hired by Co. A	A/R – Hired Co. – A D – Sales J – Primary	N/A
2. Temp ICT to Co. B	A/R – Transfer/Temp ICT Co. – A D – Human Resources J – Secondary	A/R – Hire/Temp ICT Co. – B D – Sales J – Primary
3. Returned to Co. A	A/R –Transfer/Completion of Temp ICT Co. – A D – Sales J – Primary	A/R –Retirement/Completion of Temp ICT Co. – B D – Sales J – Secondary
4. Perm ICT to Co. B 4a.Retired from Co. A, 4b. Hired (or Rehired) by Co. B	A/R – Retirement / Perm ICT Co. – A A/R – Hired or Rehired / Perm ICT Co. – B D – Sales J – Primary	N/A

This is how Departmental security (Search Page Security) works for users who have security right access to a department. Users can:

- Access all employees one or more of whose current jobs belong to that department when PERS_SRCH_GBL is used as the search table, or
- Access the particular record numbers (Empl Rec#) for employees whose current job is in the department when EMPLMT_SRCH_GBL is used as the search table.

The next table shows which users have access to which data at each of the four events described for employee 1001:

Event	*Personal Data*	*Empl Rec#0 Data*	*Empl Rec#1 Data*
	PERS_SRCH_GBL	EMPLMT_SRCH_GBL	EMPLMT_SRCH_GBL
1. Hired by Co. A	USR1	USR1	N/A
2. Temp ICT to Co. B	USR1 and USR2	USR1	USR2
3. Returned to Co. A	USR1 and USR2	USR1	USR2
4a. Perm ICT to Co. B	USR1 and USR2	USR1	USR2
4b. Hired/Rehired by Co. B	USR2	USR2	USR2

CHAPTER 9

Managing Country-Specific Workforce Data

This chapter shows you how to:

- Track Claeys formula calculations for Belgian workers.
- Prepare for severance calculations.
- Perform the Claeys calculation.
- Provide additional Canadian information.
- Provide additional information for French employees.
- Record SAMEN diversity information for Dutch workers.
- Record end of employment information for Italian workers.
- Determine USA foreign nationals residency status.

(BEL)Tracking Claeys Formula Calculations for Belgian Workers

If you're administering a Belgian workforce, you'll need to set up codes for events or conditions that may play a role in the termination of a Belgian worker's employment contract and for the special reasons associated with those conditions. You'll also specify employment contract statutes and substatutes, and track special jobs that allow for lower premiums than are normally required by Belgian labor regulations.

Many of the tables that you set up for these purposes contain information that you'll use when performing Claeys Formula calculations. The Claeys Formula is used by employers to calculate the cost of terminating a worker's contract, based on number of service years, salary, age, seniority, type of employment contract, and so on.

Pages Used to Track Claeys Formula Calculations for Belgian Workers

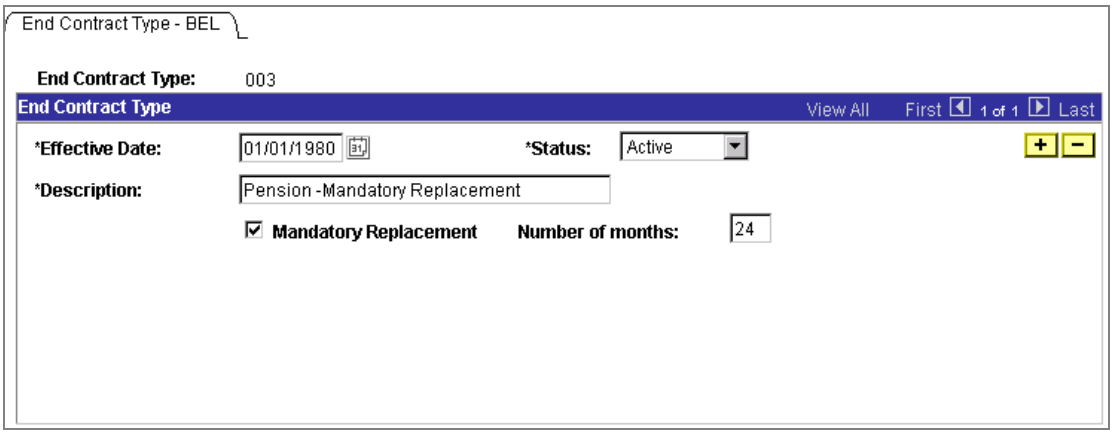
Page Name	*Object Name*	*Navigation*	*Usage*
End Contract Type	CNT_END_TBL_BEL	Administer Workforce, Administer Workforce (GBL), Setup Lcl, BEL End Contract Table, End Contract Type - BEL	Enter or update codes for events and conditions that could result in the termination of employment contracts. These codes can cover a wide range of events, including the employee's death, a voluntary or involuntary separation from your organization caused by retirement or relocation, or promotion into another job that has a different employment contract associated with it.
End Contract Reason	CNT_ENDRSN_TBL_BEL	Administer Workforce, Administer Workforce (GBL), Setup Lcl, BEL Contract End Reason Table, End Contract Reason - BEL	Define the reasons associated with event codes by adding or updating employment termination reason codes. First define contract termination event types.

Page Name	*Object Name*	*Navigation*	*Usage*
Statute Table	STATUTE_TBL_BEL	Administer Workforce, Administer Workforce (GBL), Setup Lcl, BEL Statute Table, Statute Table	Set up and maintain Belgian employment contract statutes and substatutes, and associate contract types with statutes. The statute information you're setting up on this page is used by the system as one of the components that determines, using the Claeys formula, what compensation an employee is entitled to upon contract termination. When building a particular type of contract for your Belgian workers, choose from only contract statutes for the appropriate contract type. For example, if you're constructing an employment contract, you can choose from only the contract statutes assigned to employment contract types on this page.
Reduced Charges Table	RED_CHRG_TBL_BEL	Administer Workforce, Administer Workforce (GBL), Setup Lcl, BEL Reduced Charges Table, Reduced Charged Table	Set up page to update or add Reduced Charges job categories in to the system. Under Belgian employment law, these are job categories that allow you to pay reduced taxes and/or premiums on the compensation to workers who hold those jobs.

Page Name	Object Name	Navigation	Usage
RSZ Category Table	CNT_RSZS_TBL_BEL	Administer Workforce, Administer Workforce (GBL), Setup Lcl, BEL RSZ Category Table, RSZ Category Table	Maintain RSZ (Rijksdienst Sociale Zekerheid) categories. Use these government-defined codes to maintain social security records for your Belgian employees. RSZ categories are associated with a contract type, statute, and substatute for Claeys Formula calculations.
Contract Ending	CONTRACT_END_BEL	Administer Workforce, Administer Workforce (GBL), Use Lcl, BEL Contract Ending, Contract Ending	Record information necessary for terminating a Belgian worker: specify that the worker's employment contract has ended and the reason your organization has chosen to end the contract; set up and track the worker's termination notification period; and track the worker's replacement if a replacement is mandatory based on the contract type.
Contract Replacement	CONTRACT_REPL_BEL	Administer Workforce, Administer Workforce (GBL), Use Lcl, BEL Contract Replacement	Indicate the person who will replace the worker in this employment contract.

Entering Codes for Events and Conditions Resulting in Terminating Employment Contracts

Access the End Contract Type - BEL page.



BEL End Contract Table page

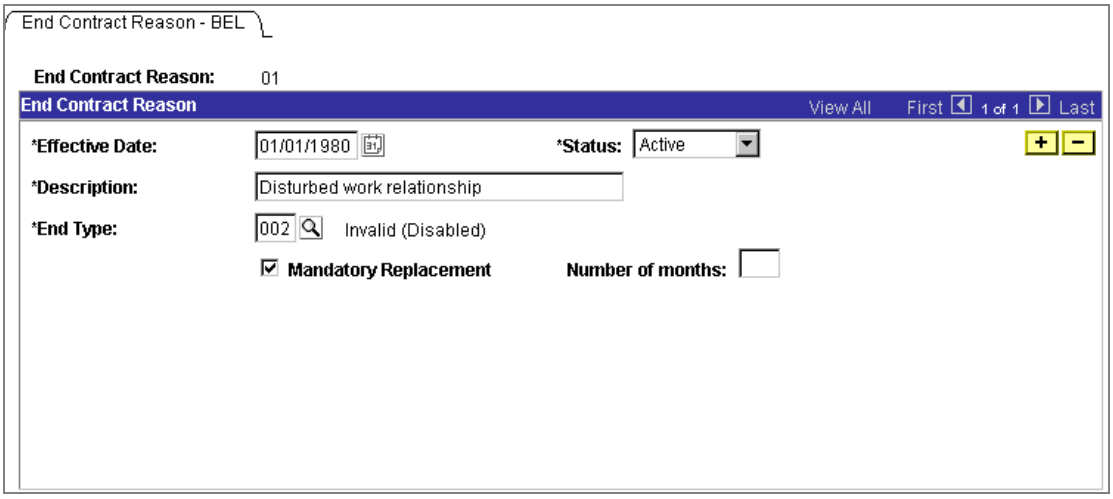
Mandatory Replacement Select if the reason for ending an employment contract with one employee requires mandatory replacement of the former worker with another worker in the same employment contract.

Number of months If you selected **Mandatory Replacement,** enter (in months) the period of time required to position the replacement.

Note. Belgian employment law mandates these requirements.

Defining Reason Codes for Ending Employment Contracts

Access the End Contract Reasons - BEL page.



End Contract Reasons - BEL page

End Type

Select an end type from the options of End Contract Type codes entered in the End Employment Terms table.

Note. If you've already moved out of the End Type field, and then decide to change the End Type code, you'll need to clear and reenter the **Mandatory Replacement** and **Number of months** fields.

Mandatory Replacement and **Number of months**

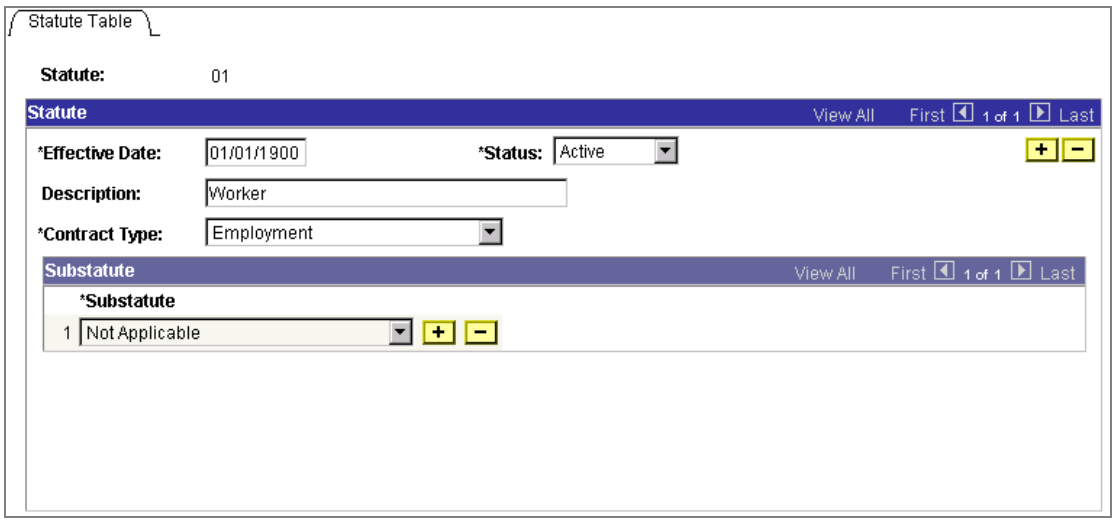
If you selected an End Type that requires mandatory replacement, when you move out of the End Type field, the system automatically selects the **Mandatory Replacement** check box for the End Contract Reason code. The system then enters the number of months that you have to replace the current employee with another employee in this contract.

If you didn't select an End Type associated with mandatory replacement information, indicate if the reason for ending an employment contract with one employee requires mandatory replacement of the former worker with another worker in the same employment contract. Then enter the number of months that can pass before you have to find the replacement employee.

Note. Belgian employment law mandates these requirements.

Setting Up Belgian Employment Contract Statutes for Claeys Calculations

Access the Statute Table page.



Statute Table page

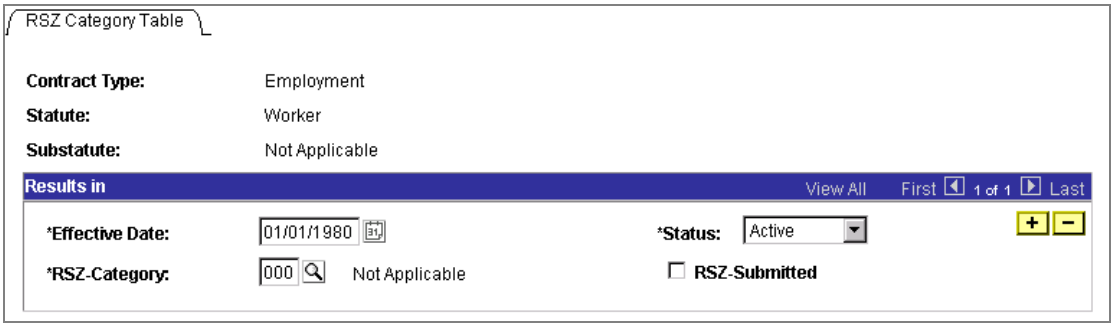
Contract Type Choose a contract type for the statute include ***Employment, Member of the professions, Non applicable*** and ***Self Employed.***

Substatute

Substatute Select the statute code that this **substatute** code should be associated with by the system.

Linking Contract Statutes to RSZ Categories

Access the RSZ Category Table page.



RSZ Category Table page

RSZ-Submitted Select to indicate that the contract is subject to RSZ. Before selecting this option, determine whether RSZ premiums have to be paid to the Belgian social security system for the pay (wage or reimbursement) associated with this contract.

RSZ-Category Select an RSZ-category from the list.

Linking the Employee to a Third-Party Service Provider

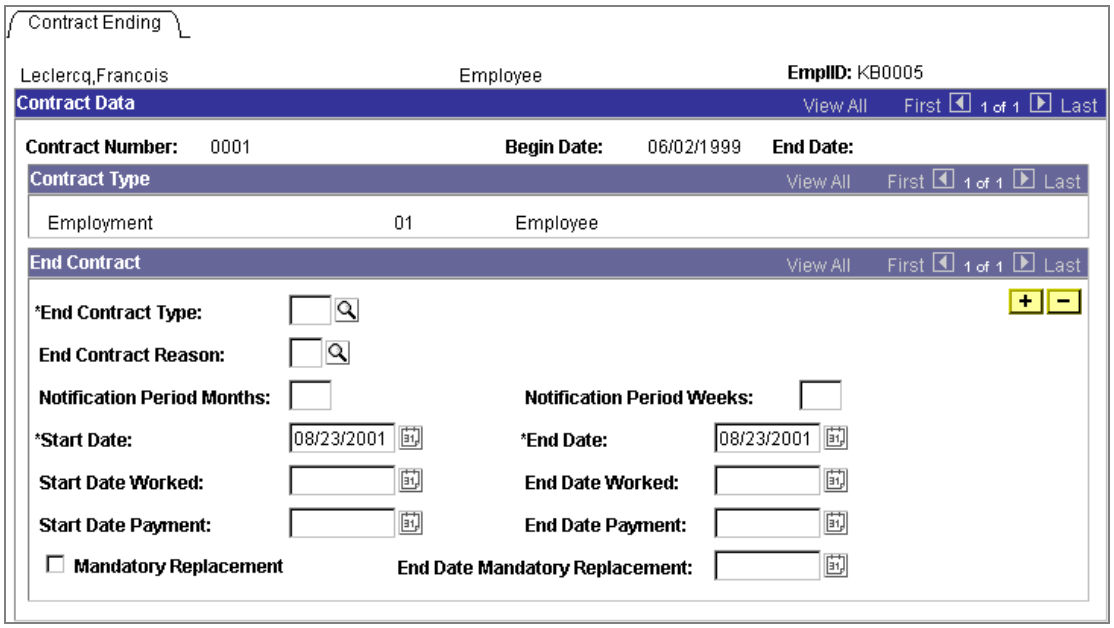
The system displays the **Contract Type,** the contract **Statute,** and the **Contract Seq Number** (contract sequence number) for this employee. Link a vendor ID to each contract type assigned to this employee.

Vendor ID Select an insurance vendor ID. To determine valid provider IDs for your organization, check the provider ID information that you specified for this company on the Company table.

Contact Name Enter the contact name for the provider that you selected for this contract.

Recording Terms for Ending Employment Contracts

Access the Contract Ending page.



Contract Ending page

End Contract Type Select a valid End Contract type (such as death, disability, or early retirement with mandatory replacement).

End Contract Reason Choose an End Contract reason (such as disrupted employee relations, family reasons, a company specific program, or contract expiration).

Notification Period Months Enter the number of months of notice that the employee must be given prior to the contract end date. The notification period that you enter here impacts Claeys calculations on the Notification pages. If you enter an amount here and move out of the field, the **Notification Period Weeks** option becomes unavailable for entry.

Notification Period Weeks Enter the number of weeks of notice that the employee must be given prior to the contract end date. The notification period that you enter here impacts Claeys calculations on the Notification pages.

If you enter an amount here and move out of the field, the system makes the **Notification Period Months** option unavailable for entry.

Start Date and **End Date** Enter the date the notification period begins and the date on which the notification period ends and the employment contract terminates.

Start Date Worked Record the employee's start date for this job contract, which should be the same as the date that you record for a job change in the worker's job record.

End Date Worked Enter the employee's last working day on this job contract, which should be the same as the date that you

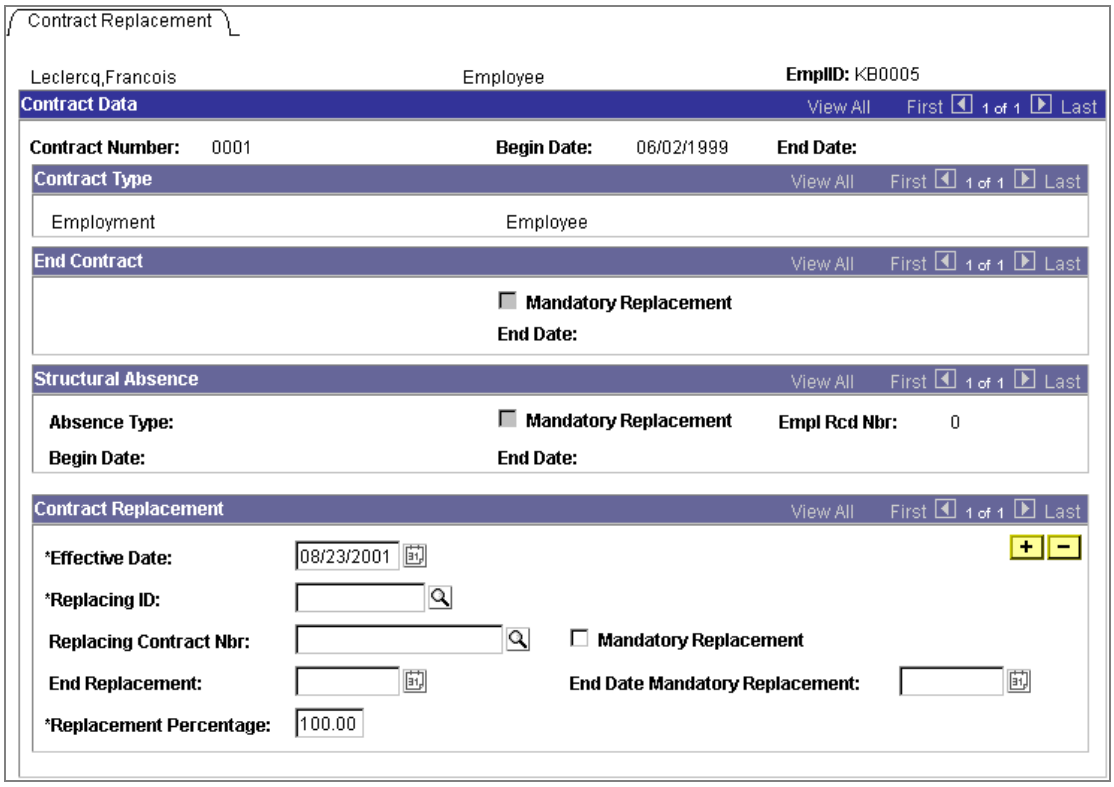
	record for a job change in the worker's job record—whether the worker is terminating with your company or leaving one job contract to move into another.
Start Date Payment and **End Date Payment**	Track the start and end payment dates, which the system stores and uses for payroll.
Mandatory Replacement	If the end contract type that you selected requires mandatory replacement, the system automatically selects this check box and makes it unavailable for entry. Specify whether an end contract type requires replacement on the End Employment Terms Table page.
End Date Mandatory Replacement	If the end contract type requires mandatory replacement, the system calculates the end date of the mandatory replacement period based on the end date on which the employee is terminated. It also calculates the number of months that you specified on the End Employment Terms table (CNT_END_TBL_BEL) as the length of the replacement period.

See Also

(BEL) Defining Reason Codes for Ending Employment Contracts

Recording Replacement Requirements

Access the Contract Replacement page.



Contract Replacement page

Replacing ID Select the ID of the employee who will replace the terminated employee in this contract. The system displays all employees who have been tagged as replacement employees for Belgian employment contracts in your human resources system. Select any applicant or employee with Employment Terms. If you want to hire someone as a replacing employee, create employment terms for him or her first or you can't choose them as a replacing ID here.

Replacing Contract Nbr (replacing contract number) Select the number for this contract, based on the replacing employee ID that you selected.

Mandatory Replacement Select to indicate that mandatory replacement is required.

End Replacement If you selected **Mandatory Replacement,** enter the date for the end replacement. You may want to track this date if you have an earlier than expected end date for a fixed term employment contract, if you know the end date.

End Date Mandatory Replacement Enter the end date for mandatory replacement.

(BEL) Preparing For Severance Calculations

Employers in Belgium or organizations employing a Belgian workforce are required to track worker information that is used in the Claeys formula calculation. This calculation determines the amount of severance compensation that your organization must pay a worker if you terminate employment. The formula looks at factors like the employee's seniority, age, and annual compensation (including salary, vacation pay, and so on) to determine your organization's liability to the employee.

Understanding How Claeys Calculates Severance

The Claeys formula calculates months of severance salary owed to an employee as follows:

In other words:

0.89 x (seniority) + 0.08 x (employee's age) + 0.0013 x [yearly compensation in EUR divided by 1000 x (Reference Index divided by Actual Index)] - 2 = Notification Period, or months of severance salary owed the employee

For example, an employee with 13 years of seniority with a company, who is 38 years of age, and who is making 82.500 EUR is entitled to 13 months of severance pay. The calculation works as follows:

0.89 x 13 = 11.57 (seniority factor)

0.08 x 38 = 3.04 (age factor)

0.0013 x (82,500 / 1000) x (125.30 / 126.00) = .1066 (compensation factor)

11.57 (seniority factor) + 3.04 (age factor) + .1066 (compensation factor) - 2 = 13 months of severance

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Note. The value for compensation is the employee's yearly compensation. This amount is based on the employee's monthly wage multiplied by the factor designated in the company table for your organization. The Belgian regulated factor amount is around 13.9.

Getting Ready To Use the Claeys Calculation

Performing the Claeys employment compensation calculation in PeopleSoft Human Resources involves several steps (order not important).

- Establish default company level information used for Claeys formula employee compensation calculations on the Company table (COMPANY_TBL), including factoring information defaults for calculating worker seniority, age, compensation, and so on.

You can override this data at the employee level on the Notification pages, where you perform the Claeys calculation for a specific worker.

- When you hire the employee into your human resources system, enter and maintain information about the employee's seniority with your organization (stored on EMPLOYMENT_DATA), age (stored on PERSONAL_DATA), and compensation (stored on JOB).

  The system uses this information to determine how many months pay the employee is entitled to if they are fired.

- Enter and maintain employment contract information for the employee on the BEL Contract Data pages (stored on CONTRACT_BEL).

- Enter and maintain end employment terms information regarding required notification periods for workers whom your company may terminate (stored on CNT_END_TBL _BEL).

- Maintain additional information used to record Belgian seniority including protected job leave information (stored on SENIORITY_BEL).

See Also

Performing the Claeys Calculation

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Companies," (BEL) Entering Default Information and Salary Factors

Pages Used in Preparing for Severance Calculations

Page Name	*Object Name*	*Navigation*	*Usage*
BEL Seniority	SENIORITY_BEL	Administer Workforce, Administer Workforce (GBL), Use Lcl, BEL Seniority, BEL Seniority	Track additional seniority for an employee that impacts the Claeys calculation that you perform on the Notification pages. Account for seniority that is based on a worker's previous employment with another organization, if appropriate.

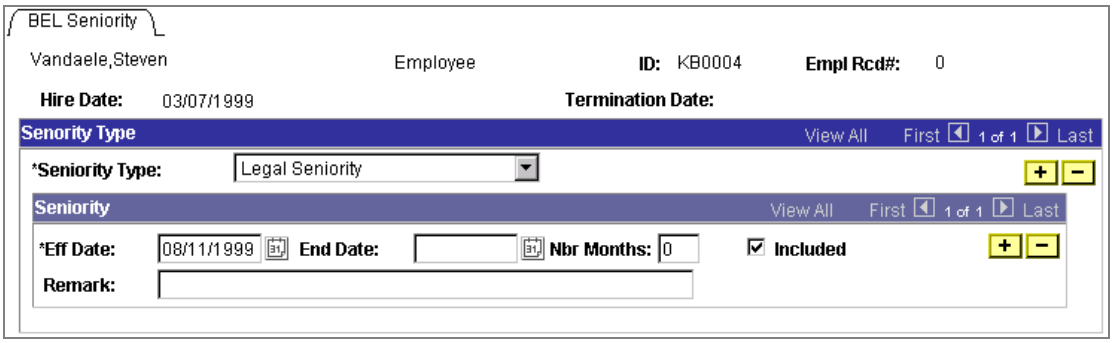
Page Name	Object Name	Navigation	Usage
Protection	PROTECT_BEL	Administer Workforce, Administer Workforce (GBL), Use Lcl, BEL Protection, Protection	Enter protected leave information for a Belgian employee. Also assign protection to employees who are union delegates, who take part in elections, or who have other qualifying characteristics. For employees with a protected status, different rules may also apply with respect to calculating the Claeys formula.

Determining Employee Seniority

Access the BEL Seniority page.

Note that the system uses the seniority information for the employee recorded on the Seniority page (SENIORITY_BEL) when performing Claeys formula processing to determine the employee's months of service. If no service months information is available on the Seniority page for an employee, the system references the employee's service months calculation on the Job Data - Job Information page.

For example, seniority in another organization may or may not count towards an employee's company seniority, depending on your own organization's business rules, but it would count towards legal seniority that impacts the Claeys calculation. This distinction is particularly important in the case of mergers between organizations where you'll decide if the seniority of employees from one organization is recognized by the other organization and count towards seniority and, if so, to what extent. Using the Seniority page, you can specify the number of months of seniority that workers are allowed to carry over to your organization from their former companies.



BEL Seniority page

Seniority Type

Select the seniority type method that you want to use to determine this employee's seniority in your organization:

Company Seniority: The system uses the Company Seniority method for determining employee seniority. When figuring seniority, this method doesn't account for periods of leave time that employees may use while remaining in a job, pension calculation issues, recognized service time, and so on.

The system *doesn't* take into account company seniority months when performing the Claeys calculation for an employee. If you enter a period for company seniority, the Claeys calculation uses only the months seniority based on the employee's service time on their Job Data record.

Legal Seniority: The system accounts for this seniority amount when calculating the Claeys Formula, which is used to calculate base pay for Belgian employees.

If you enter a period for legal seniority, the Claeys calculation takes the number of service months displayed in the **Nbr Months** field and adds it to the months of service from the employee's Job Data record and displays the sum of the two amounts on the Notification, Base page.

Eff Date (effective date)

Enter the effective date to record the beginning of the employee's additional seniority period. The system defaults in the system date, usually today's date, which you can modify as necessary to reflect the additional seniority period.

End Date

Enter the end date for the seniority period.

Nbr Months (number of months)

When you move out of the End Date field, the system calculates the number of months. The system doesn't calculate partial months. If an employee's seniority period is 100 months and 16 days, the system calculates ***100*** months of seniority.

Included

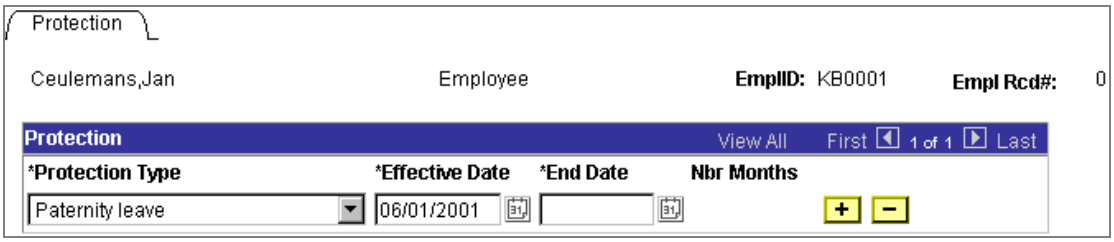
Select to ensure that the system adds the months of seniority you entered here to the employee's seniority based on their Job record (JOB) when it performs the Claeys calculation. If this check box isn't selected and you entered ***Legal Seniority*** months, the system *subtracts* the seniority period from the employee's seniority when it calculates the Claeys formula.

Remark

Enter relevant remarks about the additional seniority that you are tracking.

Entering Protected Job Leave Information

Access the Protection page.



BEL Protection page

Protection Type — Select a protection type to indicate why this leave of absence is protected.

Note. Belgian employment law mandates these protection types.

End Date — Enter the date on which the employee will return to work.

Nbr Months (Number of Months) — When you move out of the End Date field, the system calculates the duration of the protected absence.

Note. The system calculates only the absence period to the nearest month and doesn't allow for partial months. If the protected leave duration period is 45 days, the system indicates that the employee's absence covers *one* month only.

Note. The system *doesn't* take into account protection months when it calculates Claeys formula seniority, in part because protection isn't limited to absences from work that might impact seniority months.

(BEL) Performing the Claeys Calculation

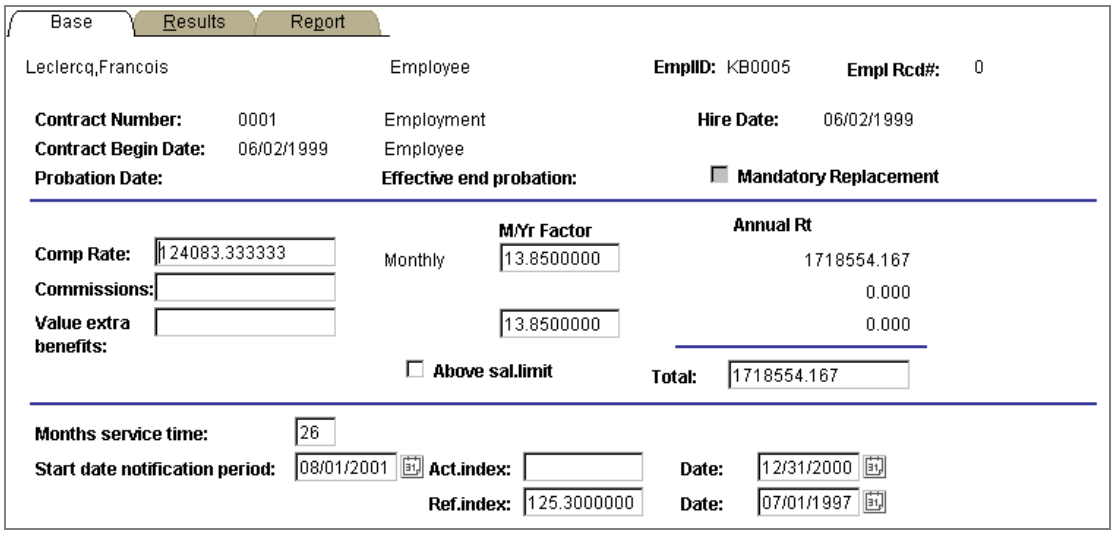
Once you've hired a Belgian employee into your human resources system and established employment contract terms, end employment terms, seniority, and protected leave (protection) information, you can perform the Claeys calculation to determine your potential severance pay liability if you were to terminate the employee. When you're ready to perform a Claeys calculation for a specific employee, use the Notification pages to set your calculation variables, perform the calculation, and see the results.

Pages Used to Perform the Claeys Calculation

Page Name	Object Name	Navigation	Usage
Base	NOTIF_CALC_BEL	Administer Workforce, Administer Workforce (GBL), Use Lcl, BEL Notification, Base	Review and set the variables necessary to perform the Claeys calculation, including the employee's compensation, adjust default factor information, and months of service.
Results	NOTIF_CALC2_BEL	Administer Workforce, Administer Workforce (GBL), Use Lcl, BEL Notification, Results	Complete the severance calculation.
BEL Notification Report	RUNCTL_PER066_BEL	Administer Workforce, Administer Workforce, Report Lcl, BEL Notification	Run the Notification report.

Reviewing Claeys Calculation Variables

Access the Notification - Base page.



Notification - Base page

The system displays the employee's name, their employee **ID** and the employment **Empl Rcd#** (employment record number) for your reference. This information comes from the employee's personal data record.

The system displays employment and end employment contract terms information for the employee that you entered on the **BEL Contract Data** and BEL End Employment Terms

pages. The system displays the employee's **Hire Date** from the Job Data Record and indicates if, according to the end employment terms for the worker, the contract requires **Mandatory Replacement.**

Determining the Employee's Base Compensation Amount (Jaarloon)

Comp Rate (Compensation Rate) — The system calculates the employee's monthly compensation rate based on the employee's compensation rate information on the Job Data, Compensation page and displays it here. Adjust the rate information as necessary. The system uses this amount when determining the employee's monthly pay variable for the Claeys calculation.

M/Yr Factor (month/year factor) — The system multiplies the month base amount by the M/Yr Factor of ***13.85000*** to calculate the employee's **Annual Rt** income amount. The default factor displayed here comes from the default employee compensation factors that you entered on the Company table. The Belgian government determines this factor amount, but you can override the default here if the factor amount changes.

Commissions — Enter any commissions amount that the system should add to the employee's month base as part of the Claeys calculation income amount.

Value Extra Benefits — Add in value extra benefits amounts, including other components of nonbase pay, such as any benefits the employee receives (for example, salary, vacation pay, 13th month, meal checks, and so on). The system multiplies the Val. Extra amount by the Val. Extra base Factor of ***13.85000*** to calculate the employee's yearly extra income amount.

M/Yr Factor — The system multiplies the Value Extra Benefits amount by the M/Yr Factor of ***13.85000*** to calculate the employee's Annual Rt income amount. The default factor displayed here comes from the default employee compensation factors that you entered on the Company table. The Belgian government determines this factor amount, but you can override the default here if the factor amount changes.

Total — The system displays the total compensation amount (jaarloon) based on the year base, the commission, and extra year results. Adjust the system calculated total as necessary.

Understanding the Above Salary Limit Setting

Above sal. limit (above salary limit) — The system also indicates if the employee's compensation total is above salary limit by accounting for the contract

type. If you select this check box, then you can override the factor values on the Notification - Results page.

To change the above salary limit setting, ensure that the start date notification period date falls *after* the Effective end probation date that appears with the employee's contract information at the top of the page. In this case, the system fixes the salary limit for a longer period (in which case the system uses the factors in the **Claeys Defaults** group box in the Notification period calculation and makes them available for entry on the Notification, Results page).

If the date is *prior* to the effective end probation date, you can't change the above salary limit setting.

Note. The compensation currency on the Notification, Base and Results pages is the same as the employee's job currency that is set on the employee's Job record (JOB).

Months service time

The system calculates and displays the employee's number of months service time. The system determines service month information by looking at both the employee's service months information on the Job Information page (JOB_DATA) and the number of months service time on the Seniority page (SENIORITY_BEL) *if* the seniority type is set to ***Legal Seniority.*** The system adds the two seniority amounts and displays them as the months service time amount.

The system doesn't consider partial months in this calculation and doesn't round up. If the employee's service time is 9 months, 16 days, the system displays ***9*** as the employee's months service time. Adjust the months service time as necessary.

Note. If you enter seniority information in the Seniority page for an employee, and the seniority type is set to *Company Seniority,* the system uses the months of seniority calculation on the Job Information page to set the number of months service time on the Notification, Base page.

Start date notification period

Set the start date notification period for the employee's termination notification period date to the first day of the *next* month if you're not performing the Claeys calculation for this employee on the first day of the *current* month. In other words, the system sets the start date notification to the first day of the month following the Effective Date that appears with the contract information at the top of the page.

For example, if you start your Claeys calculation for an

employee on April 14, the system enters a start date for the notification period of May 1. Override this date as necessary.

Note. The Start date notification period that appears on the Base page affects the way the system performs the Claeys Calculation on the Results page. If the Start date notification period begins before the Effective end probation date on the Base page, the system uses a Notification period of *Days* on the Results page when you click the Calculation button. If you enter a Start date notification period that begins after the employee's Effective end probation date, the system uses a Notification period of *Days, Weeks,* or *Months,* depending on the Statute information entered for that employee on the Employment Terms Type page, as follows. If the employee is classified as a *Worker* on the Employment Terms Type page, the Notification period appears in *Weeks.* The classification of *Employee* results in a Notification period of *Months.* And the classification of *Not Applicable* results in a Notification period of *Days.*

Act. Index (actual index)

The actual index if one is assigned for this company in the Company Table. The actual index is a monthly reference number to be held against the reference index number.

The actual index is used in the Claeys calculation to calculate the notification period term related to the Yearly Base on the Notification, Results page:

((Yearly Base Salary / 1000) * (Factor Yearly Base / Act Index) * Correction Factor);

Date

The last day of the year preceding the year when you're performing the Claeys calculation for an employee (in this case, December 31, 1997). This date is for your reference only, and isn't saved when you save the page.

Ref. Index (reference index)

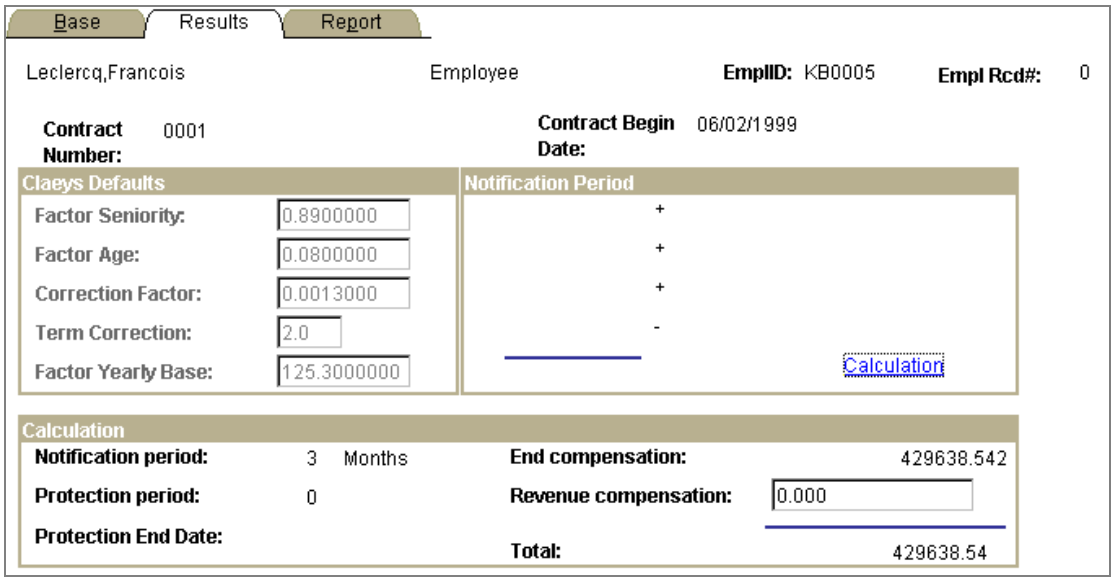
You can also update the reference index or accept the system default that is based on the Factor Yearly Base Index set up on the Company Table- Default Settings for this company. The reference index is a yearly reference amount to be compared against the actual index amount.

Date

The system also displays the reference index date (in this case, July 1, 1997). The system sets this date to the beginning of the last half of the year prior to the year in which you're performing the Claeys calculation. This date is for your reference only, and isn't saved when you save the page. The system doesn't use the reference index as part of the Claeys calculation.

Calculating the Severance Amount

Access the BEL Notification - Results page.



BEL Notification - Results page

The system displays the **Claeys Defaults** for **Factor Seniority, Factor Age, Correction Factor, Term Correction,** and **Factor Yearly Base** from the Company table for this employee's company that you assigned on the Job Data, Work Location page. Change these factors at the employee level on this page *only* if you selected the Above sal. limit check box on the BEL Notification - Base page.

Note. The system uses these Claeys defaults factors as part of the Claeys calculation only when the Above sal. limit check box is selected on the Notification, Base page.

When you first open this page, the **Notification Period** and **Calculation** group boxes are empty. This is where the system displays the results of the Claeys calculation for this employee after you perform the calculation by clicking the **Calculation** link.

The system displays the calculated **Notification period** for this employee in the **Calculation** group box and shows how it calculated the Notification period in the **Notification period** group box.

How the System Calculates the Notification Period

The system calculates the notification period in one of two ways depending on whether the employee's yearly base salary is above the salary limit:

- If the employee's yearly base salary is *above the salary limit* (Sal limit check box selected), the **Notification period** that appears in the **Calculation** group box is based on the calculations that appears in the **Notification Period** group box.

The system calculates the Notification Period based on the employee's seniority, age, and compensation:

Seniority Term = (Months Service Time / 12) * Factor Seniority

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Note. For the Seniority Term amount, the system rounds the division by 12 differently for each month.

Age Term = Employee's Age on Notification Start Date * Factor Age

Compensation Term = (Base Total / 1000) * (Factor Yearly Base / Actual Index) * Correction Factor

Total Notification Period = Seniority Term + Age Term + Compensation Term - Term Correction

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Note. It's easy to tell if you're using the above salary limit method by the way the page looks when you perform the calculation. If the system used the above salary limit method to determine the notification period, it displays the Notification Period calculation in the **Notification Period** group box. The Claeys defaults that appear on the page are also available for entry, though these come from the company defaults for the employee's company and probably shouldn't be changed.

- If the employee's base isn't *above the salary limit,* (Above sal. limit check box is cleared), the Notification period amount is based on the statute, service time, probation end date, and notification start date—without accounting for any of the **Claeys Defaults** factors that appear on the page. In this case, the system calculates the employee's Notification Period as follows:

```
If the Statute is "Worker"

if Notification Start Date <= Effective Probation End Date, then Period is "0"

if the Service Time is lower than 240 Months (20 years) the Period is "4"

else the Period is "8"

If the Statute is "Employee"

if Notification Start Date <= Effective Probation End Date, then Period is "7"

else the Period is (((Service Time / 12) / 5) +1) *3 (each division is
truncated with zero decimals)

Else the Period is "0"
```

The unit of time for the notification period information is based on the employee's statute type that you established on the BEL Employment Terms Table page. When the statute type is set to *Worker,* the period unit is in *Weeks.* When the statute is for an *Employee,* then the period unit is in *Months.* If the statute is anything other than worker or employee,

the period unit is *Days*. Whenever the notification start date falls within the probation period, the unit of time is *always* Days.

Understanding Protection Period Information

The system compares the end date for any of this employee's qualifying protection periods that you recorded on the Protection table (PROTECTION_BEL) to the notification start date recorded on the Belgian Notification Calculation table (NOTIF_CALC_BEL) to determine the **Protection period.** This method of comparison ensures that the employer respects the employee's protection rights.

Note. The protection period isn't included in the Claeys calculation process.

The system also displays the **Protection End Date,** which is the *actual* end date of the protection period if there is any protected leave time entered for this employee on the Protection page. This is the date that you set as the end date for any qualifying protection period that you specified on the Protection page.

Working With the End Compensation Amount

End compensation is the resulting Claeys calculation amount that you owe this employee as severance pay as calculated by the system.

Depending on the notification period unit of time, the system calculates the end compensation by dividing the yearly base total (displayed on the Notification, Base page) by 12 if the notification period is months, 52 if weeks, or 365 if days. The result is then multiplied by the notification period amount to arrive at the end compensation amount. For example, the end compensation amount calculation for Josef Timmermans is:

(2391248.62 / 12) * 4 = 797082.87

Any amount that you enter in the **Revenue compensation** field is added to the **Total** severance amount for the employee.

When you are done, click **Save** to store the results of the Claeys calculation on the Belgian Notification Calculation table (NOTIF_CALC_BEL).

If you need to change the Notification data and rerun the calculation, make your changes and click the Calculation button again. The system clears the old results and calculates the Claeys amount based on your changes.

Running the Notification Report

After completing the calculation, run the termination notification report. The report page displays the employee's contract- and compensation data together with the Claeys formula parameters, the calculated notification period and the resulting end compensation.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Companies," (BEL) Entering Default Information and Salary Factors

(CAN) Providing Additional Canadian Information

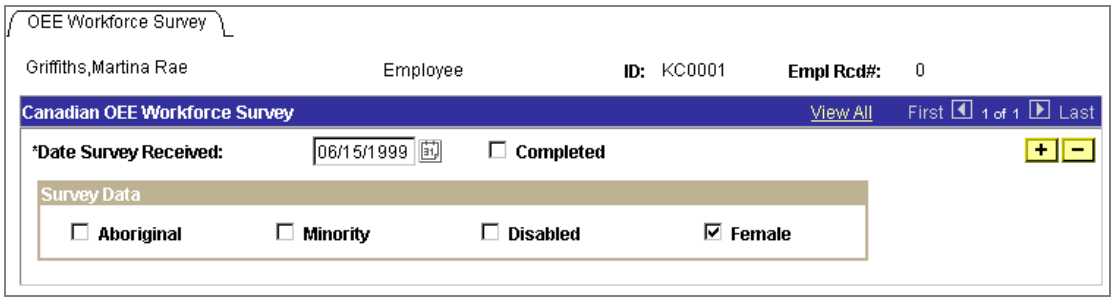
There are a few issues unique to your Canadian workforce. Use the following pages to record the necessary employee information.

Pages Used to Provide Additional Canadian Information

Page Name	*Object Name*	*Navigation*	*Usage*
OEE Workforce Survey	CAN_OEE_SURVEY	Administer Workforce, Administer Workforce (GBL), Use Lcl, CAN OEE Workforce Survey, OEE Workforce Survey	Record Ontario Employment Equity Commission (OEEC) workforce survey results. While the OEEC no longer requires employees in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality. You can use this data for meeting regulatory reporting requirements for Ontario.
OEE Workforce Survey	PERS_OFFLNG_CAN	Administer Workforce, Administer Workforce (GBL), Use Lcl, CAN Official Languages, Official Languages	Record employee level information about the use of official languages. The information stored in this page is used for the Official Languages reports you submit to the Canadian government, in accordance with the Official Languages Act.

Entering Canadian OEE Workforce Survey Responses

Access the OEE Workforce Survey page.



OEE Workforce Survey page

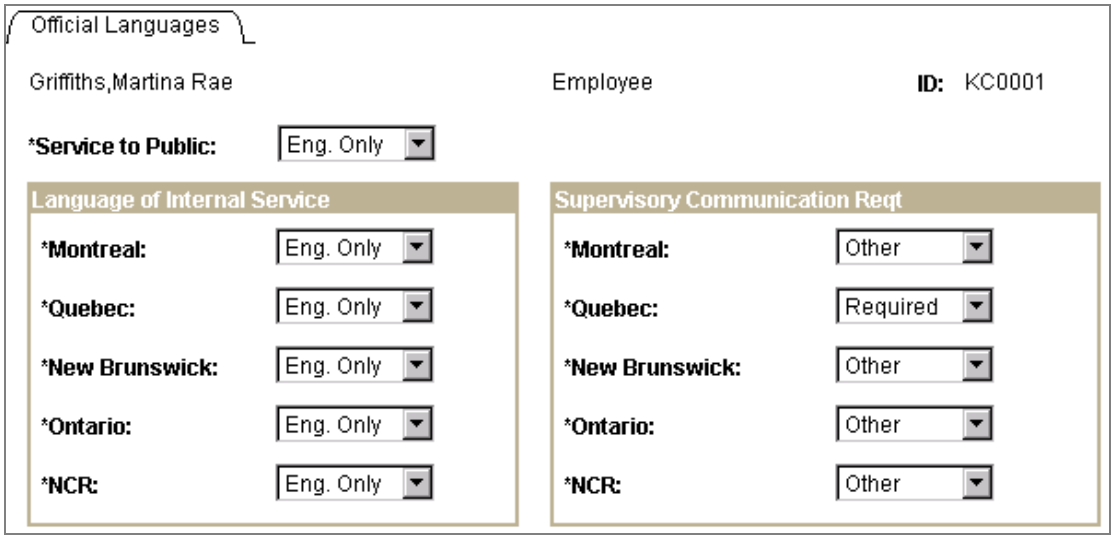
Date Survey Received Enter the date the survey was received. The default is the system date, which is usually today's date. Change this date if necessary.

Completed Select to indicate that the survey was completed.

Survey Data Indicate whether the survey respondent is ***Aboriginal, Minority, Disabled,*** or ***Female.***

Entering Official Languages Information

Access the OEE Official Languages page.



Official Languages page

Service to Public Indicate which languages the employee uses to provide service to the public.

Language of Internal Service

Montreal

- Quebec
- New Brunswick
- Ontario

NCR (National Capital Region)

For the locations listed in the **Language of Internal Service** group box, indicate which language(s) the employee uses to communicate internally. Use the ***N/A (not applicable)*** option for those locations that don't apply.

Supervisory Communication Reqt

Montreal

- Quebec
- New Brunswick
- Ontario

NCR (National Capital Region)

For the locations listed in the **Supervisory Communication Reqt** (supervisory communication required) group box, indicate which language(s) the employee requires for supervisory communication. Use the ***N/A (not applicable)*** option for those locations that don't apply.

See Also

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "(CAN) Meeting Regulatory Requirements for Canada" Meeting Official Languages Act Reporting Requirements

(FRA) Providing Additional Information for French Employees

Use the following pages to track additional French worker information related to mandates and to a worker's required military service situation.

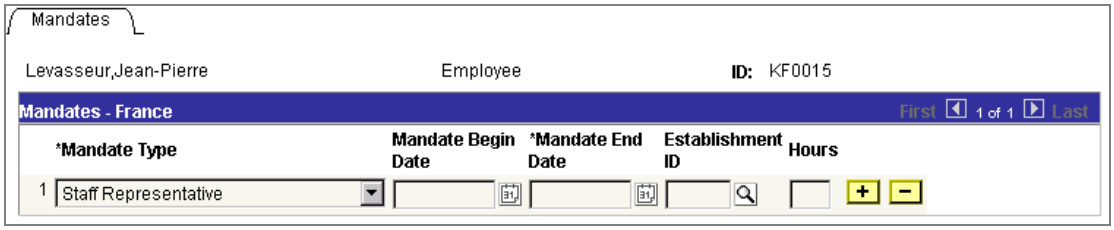
Pages Used to Track Additional French Worker Information

Page Name	*Object Name*	*Navigation*	*Usage*
Mandates	MANDATES_FRA	Administer Workforce, Administer Workforce (GBL), Use Lcl, FRA Mandates, Mandates Administer Workforce, Administer Workforce (FPS), Use2, FRA Mandates, Mandates	Track mandate information for your French workers.

Page Name	*Object Name*	*Navigation*	*Usage*
Military Situation	MILIT_SITUATN_FRA	Administer Workforce, Administer Workforce (GBL), Use Lcl, FRA Military Situation, Military Situation Administer Workforce, Administer Workforce (FPS), Use2, FRA Military Situation, Military Situation	Enter worker military service information, including the branch of the armed forces the worker served in, his or her identification number, grade, and reserve status.

Tracking Mandate Information

Access the Mandates page.



FRA Mandates page

Mandate Type Select a mandate type.

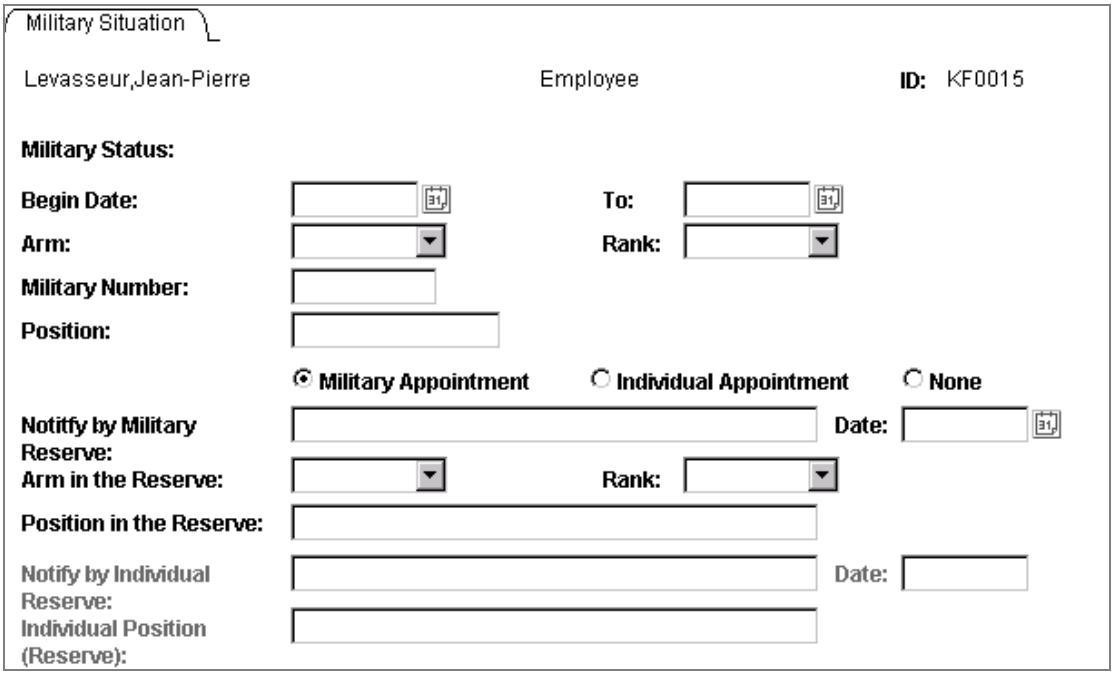
Mandate Begin Date and **Mandate End Date** Indicate the mandate begin and end dates during which the worker was associated with the Mandate Type.

Establishment ID Select an establishment ID.

Hours Indicate the number of hours for the mandate, if appropriate.

Tracking Military Service

Access the Military Situation page.



Military Situation page

Begin Date and **To** — Indicate the begin and end date for the worker's military service.

Arm — Enter the arm of the military in which the worker served.

Rank, Military Number, and **Position** — Indicate the worker's rank, military number, and position if known.

Military Appointment, Individual Appointment, None — Indicate if the service was the result of a military appointment, an individual appointment, or none to indicate the worker wasn't appointed to the position.

If the worker had a **Military Appointment,** enter additional reserve information.

Notify by Military Reserve — Enter the appropriate Notify by Military Reserve information.

Rank — Enter the worker's rank.

Arm in the Reserve — Enter the worker's arm in the reserve.

Date — Enter the date of notification.

If the worker has an **Individual Appointment,** enter additional information.

Notify by Individual Reserve — Enter the appropriate Notify by Individual Reserve information.

Individual Position (Reserve) — Enter the worker's individual position in the reserve.

Date Enter the date of notification.

Identifying French Employees' Dependents and Beneficiaries

Use the Dependent Data component to identify an employee's dependents and beneficiaries with respect to pensions and insurance and to provide information for payroll processing.

Note. Some of the information on these pages applies only if you are using PeopleSoft Base Benefits or PeopleSoft Benefits Administration.

See Also

"Entering Additional Data in Human Resource Records," Tracking Dependent Identification Data

(NLD) Recording SAMEN Diversity Information for Dutch Workers

If you have a Dutch workforce, you'll need to track information on the national origin of an employee's birth parents. This establishes the ethnic status of workers, which complies with the SAMEN diversity law, Wet Stimulering Arbeidsdeelname, or the "law to promote equal labor participation for persons of a different ethnic origin" in the Netherlands.

The SAMEN law provides for equal employment opportunities for immigrant workers and/or their children. The birth country of either the employee or one of the employee's parents designates if the employee qualifies as a SAMEN employee and can be recorded as such for reporting to the Dutch government. So children of immigrant workers are subject to this law as well, even if they were born in the Netherlands, and even if the parents have been naturalized in the meantime, as long as one of the parents was born in one of the SAMEN countries. Every two years, the Dutch Ministry Of Social Affairs reviews the list of countries that are designated as SAMEN countries. This decision depends mainly on employment statistics for immigrant workers from certain countries (and their children).

If the employee qualifies and has no objection to SAMEN registration, record the birth country of the employee's mother and father. When you select a birth country for the employee's parents, you can choose only from among those countries stored on the Country table (COUNTRY_TBL). The system indicates if the birth country is one of the SAMEN countries stored on the NLD SAMEN Country table. When the selected country is *IDN* (Indonesia), an additional category appears indicating an additional choice to fulfill SAMEN identification requirements.

Page Used to Record SAMEN Diversity Information

Page Name	*Object Name*	*Navigation*	*Usage*
SAMEN Registration	SAMEN_NLD	Administer Workforce, Administer Workforce (GBL), Use Lcl, NLD SAMEN Registration, SAMEN Registration	Record data for a qualifying Dutch worker for the purpose of establishing worker ethnic status to comply with the SAMEN diversity law.

Establishing a Worker's Ethnic Status

Access the SAMEN Registration page.



SAMEN Registration page

Date of Birth Displays the selected employee's date of birth.

Birth Location Displays the selected employee's birth location.

Objection Registration Select if the employee objects to being included in the SAMEN reporting to the Dutch government. If selected, the system won't include the employee when you generate the SAMEN report.

Included in Target Group Select to include the employed in the SAMEN reporting to the Dutch government. This field is available for entry only when one parent comes from a target group.

SAMEN Identification

Birth Country — Displays the employee's birth county.

Note. The system always displays the employee's birth country and indicates if it is one of the SAMEN countries stored on the NLD SAMEN Country table.

Father's Birth Country — Select the father's birth country.

Mother's Birth Country — Select the mother's birth country.

Category — If a birth country is ***IDN (Indonesia),*** a **Category** field appears, in which you must select one of the following values to fulfill SAMEN identification requirements:

- ***Former Netherlands East Indies*** (Born in Indonesia before 27-12-1949)
- ***Incl. Law Rietkerk-uitkering*** (In Register 1b, Rietkerk-uitkering law)
- ***Indonesia (after 27-12-1949)*** (Born in Indonesia after 27-12-1949)

In Target Group — The system automatically selects this check box if the birth country for the employee, employee's father, or employee's mother is one of the countries stored on the NLD SAMEN County table.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Appendix: PeopleSoft Application Fundamentals for HRMS Reports," Administer Workforce Reports

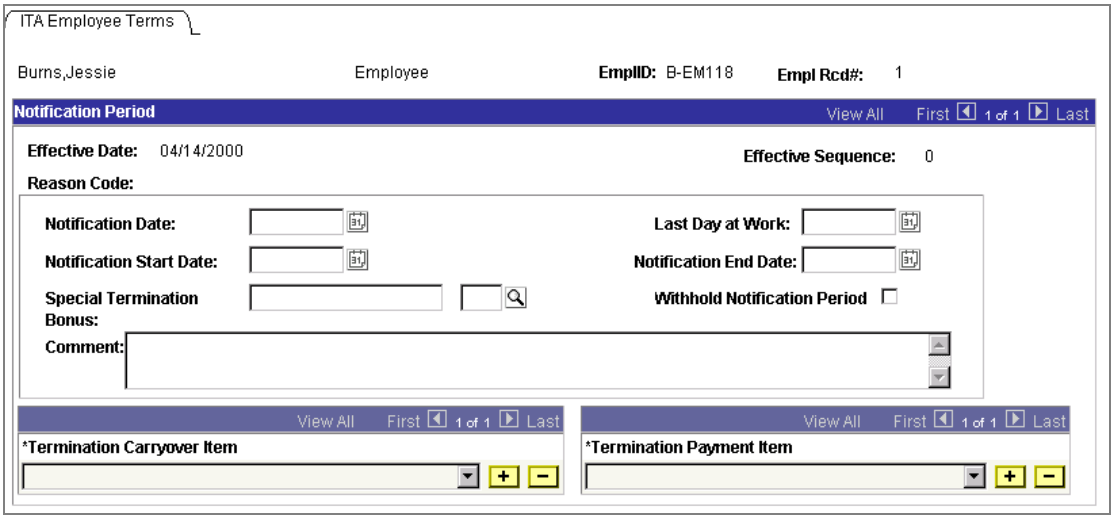
(ITA) Recording End of Employment Information for Italian Workers

Page Used to Record End of Employment

Page Name	*Object Name*	*Navigation*	*Usage*
Employee Terms	EMPL_TERMS_ITA	Administer Workforce, Administer Workforce (GBL), Use Lcl, ITA Employee Terms, Employee Terms	Record the date an employee resigns from your company and the normal notice period as required by the employee's contract.

Recording Employee Resignation Dates and Normal Notice Periods

Access the ITA Employee Terms page.



ITA Employee Terms page

Notification Date Indicate the date the employee gave notice of intent to end the contract.

Last Day at Work Enter the last day the employee will be at work.

Notification Start Date Indicate the beginning of the period that the employee should work for the company after the notification date, according to the employee's contract.

Notification End Date Indicate the end of the period that the employee should work for the company after the notification date, according to the employee's contract.

Special Termination Bonus Indicate any bonus incentive to the Employee.

Withhold Notification Period Select to indicate that the employee’s salary is to be withheld during period between the notification start and end dates.

Termination Carryover Item Indicate the Items that the Employee can carryover for a Termination. For example, during terminations like "Term for Transfer to Affiliate.” the Employee and the Employer can decide to "freeze" some Items that can be transferred to the same Employee for the new hiring process in the new affiliate company.

Termination Payment Item Indicate the Items that should be paid after Termination.

(USA) Determining Foreign Nationals US Residency Status

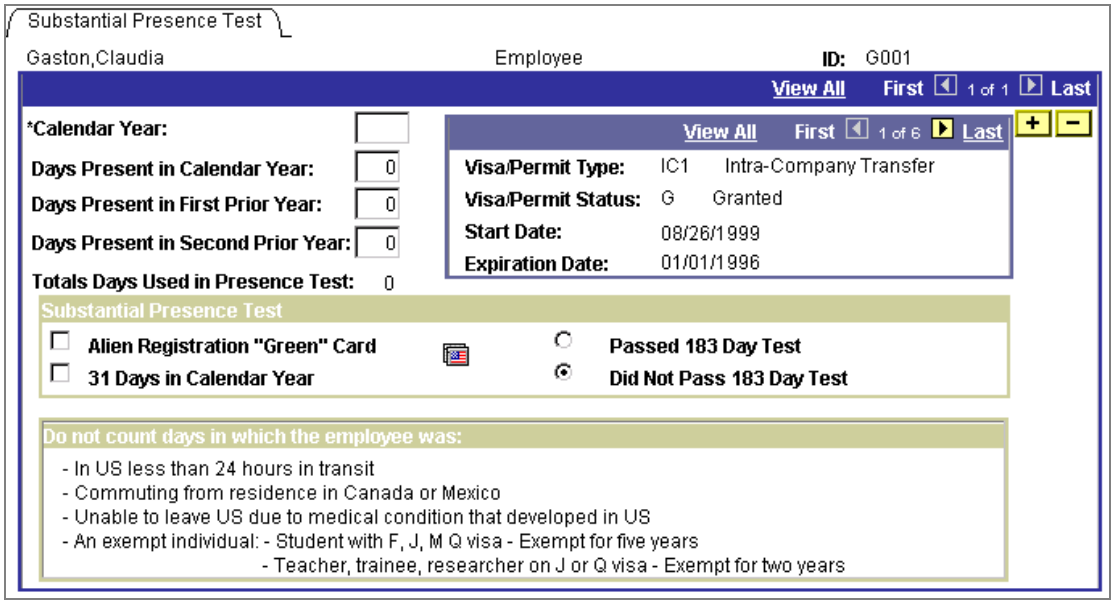
Use the Substantial Presence test to determine tax reporting responsibilities for your organization when employing alien residents.

Page Used to Determine Eligibility

Page Name	Object Name	Navigation	Usage
Substantial Presence Test	PRESENCE_TEST	Administer Workforce, Administer Workforce (GBL), Use Lcl, USA Presence Test, Substantial Presence Test	Use the substantial presence test to determine if alien employees are considered U.S. residents for tax purposes for a given calendar year.

Running the Substantial Presence Test

Access the Substantial Presence Test page.



Substantial Presence Test page

Under this test, a foreign national is considered a resident for tax purposes if he or she is present in the U.S. at least 31 days in the current year and 183 days during the current year and the two preceding years, as determined under a weighted formula.

Nonresident aliens may make a special election to be treated as residents for the first year in which they are present in the U.S. This election is subject to several restrictions, one of which is that they must satisfy the substantial presence test in the year following the election.

Rules that govern which days don't count towards an employee's substantial presence test appear at the bottom of the page. If the employee has a visa/permit, the Visa/Permit Status field on the page reflects this. This test is only valid for current or previous years.

Calendar Year

Enter the appropriate calendar year.

Days Present in Calendar Year

Days Present in First Prior Year

Days Present in Second Prior Year

Enter the number of days present in the current year. Then enter the number of days present in the previous year, followed by the number of days present in the year previous to that.

The actual days present in the first prior year equal one third of 365 minus the Days Present in First Prior Year field. The actual days present in the second prior year equal one-sixth of 365 minus the Days Present in Second Prior Year field.

For example, enter the number of days present in 1998, followed by the number of days present in 1997, followed by the number of days present in 1996.

The Total Days Used in Presence Test field automatically displays the total number of days after the all the above fields are completed.

Note. If you are entering substantial presence test information for multiple years, the First Prior Year and Second Prior Year fields are based on the prior year information.

Substantial Presence Test

Alien Registration "Green" Card

Select if the employee has been issued an alien registration card, or green card. If you select this check box, the substantial presence test isn't necessary; the employee is considered a U.S. resident for tax purposes.

U.S. Flag, Passed 183 Day Test, Did Not Pass 183 Day Test

To see if the employee passed the substantial presence test, click the **U.S. Flag** button and the system calculates the total number of days present and selects either the **Passed 183 Day Test** or **Did Not Pass 183 Day Test** option.

In the 183 Day Test calculation, the system uses a 100 percent of the days present in the calendar year.

31 Days in Calendar Year

This check box is automatically selected if the employee has been present 31 days in a calendar year.

CHAPTER 10

Updating Workforce Information

This chapter provides an overview of updating workforce information and discusses how to:

- Use the Update components to change personal and job data.
- Locate personnel records.
- Change and delete employee IDs.
- Update personal data.
- Update job data.
- Track U.S. federal government employee appraisals.
- Enter salary changes.
- Update multiple job information.
- Run processes to facilitate accurate reporting.

See Also

"Hiring Your Workforce"

Overview of Updating Workforce Information

A person's history with your organization may involve many job changes, such as promotions, leaves of absence, layoffs, retirement, pay rate changes, and so on. To maintain a complete history of the person's tenure, you'll enter these changes regularly in PeopleSoft Human Resources.

This section discusses the basic procedures for entering a variety of changes to a human resources record. Depending on the personnel action you're taking, you may have to enter more information than described here. For example, a promotion might include a new employee type, a change in benefit status, a pay rate change, and new standard hours and work period—all of which you'll record on the various data pages.

Updating When You've Implemented PeopleSoft Payroll for North America

When you modify job data that affects employee payroll, the system marks payline records for recalculation where needed. When payroll is recalculated, the payroll system uses the new information.

Updating When You've Implemented PeopleSoft Benefits Administration

When you modify employee job or employment data that affects benefits, the system sets the flags controlling event maintenance to indicate that a change has occurred. Then, during the next event maintenance process, the system processes the event.

Using the Update Components to Change Personal and Job Data

To update workforce information, use the same pages you use to add employee records. However, the pages behave differently during the update process than they do when you add data for the first time. This means you *shouldn't* use the Hire, Add Non-Employee, or Add Concurrent Job components to update a person's personal data or job record. Instead, use one of the four update components on the Administer Workforce menu. We've configured these components to simplify updating a person's record in different business situations. The following table describes each group and its navigational path.

Component	*Pages in the Group*	*Use this Component When…*
Personal Data	Name History Address History Personal History Identity/Diversity	To update a person's personal information without changing job information.
Job Data	Work Location Job Information Job Labor Payroll Global Payroll Salary Plan Compensation Job Earnings Distribution Benefit Program Participation Employment Information Employment Dates	To work with historical effective-dated rows of the employee's Job data. (Work with past, present, and future Job data.)

Component	*Pages in the Group*	*Use this Component When…*
Current Job	Work Location Job Information Job Labor Payroll Global Payroll Salary Plan Compensation Job Earnings Distribution Benefit Program Participation Employment Information Employment Dates	Update only the employee's *current* job record. This improves processing time and system performance. You can add new current effective-dated rows to the job record, but you cannot see or add historical job records.
Pay Rate Change	Employee Profile Salary Plan Compensation Job Earnings Distribution	Change the employee's compensation, without changing personal or job data.

See Also

"Hiring Your Workforce"

Locating Personnel Records

The first time you open an update page, the system displays a search page for you to select the person on whose records you want to work. If you do not know the person's employee ID, use the page to search for the correct record by name, partial last name, alternate character name, department, setID, or employment status. If you prefer, use the Search By National ID inquiry page to find a person's record using a national ID.

Changing and Deleting Employee IDs

Employee IDs are the means by which you identify employees and nonemployees throughout PeopleSoft Human Resources. Maintaining a precise roster of IDs is critical to the accuracy of your employee data.

To help you keep accurate records, you can change or delete employee IDs. Though you'll rarely need to do this, you'll find it necessary in cases where you entered an employee ID in error or where you no longer need an ID.

The ID modification process changes the ID in every record where PeopleSoft Human Resources uses it, so keep in mind that modifications might affect other functions, such as payroll and benefits processing. Deleting an ID also deletes all security profiles associated with the ID; therefore, PeopleSoft recommends you delegate this responsibility to your system administrator.

See Also

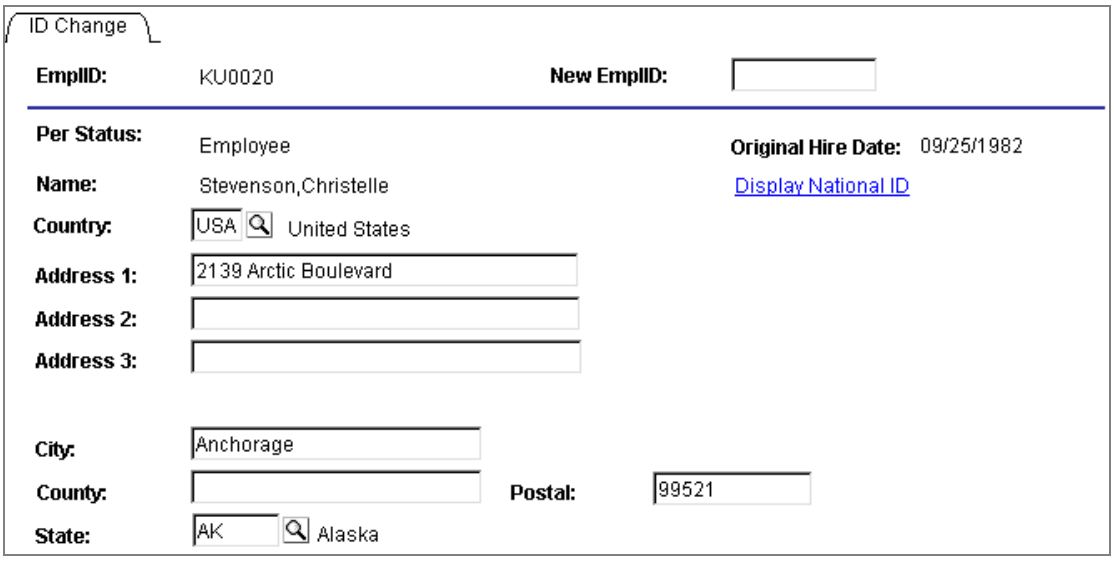
PeopleSoft Application Fundamentals for HRMS PeopleBook, "Administering PeopleSoft Security"

Pages Used to Change or Delete Employee IDs

Page Name	*Object Name*	*Navigation*	*Usage*
ID Change	EMPLOYEE_ID_CHANGE	Define Business Rules, Administer HR System, Process, ID Change, ID Change Administer Workforce, Administer Workforce (USF), Process, ID Change, ID Change	Modify employee IDs.
ID Delete	EMPLOYEE_ID_DELETE	Define Business Rules, Administer HR System, Process, ID Delete, ID Delete Administer Workforce, Administer Workforce (USF), Process, ID Delete, ID Delete	Remove any IDs mistakenly entered into the system. **Note.** If you've already run payroll with this ID included, you must manually delete employee payroll records, such as tax and deduction records.

Modifying Employee IDs

Access the ID Change page.



ID Change page

You'll see display-only information on the employee to whom the system or you assigned the ID. Confirm that this is the correct person, and enter a **New EmplID** (new employee ID).

Updating Personal Data

Use the Personal Data component to update a person's name, address, phone numbers, marital status, education, and other personal information. See the Personal Data Component for a complete discussion of the component and its data entry fields.

The Personal Data pages include two different types of personal data:

- Effective-dated data.

  Name, address, marital status, and (for U.S. employees) whether a person is a smoker or nonsmoker are all effective-dated fields. Enter current, historical, or future information in these fields. When new information takes effect, the system stores the old data so that you can track the changes that occur over time. Effective-dated personal data is stored in the Personal Data History table (PERS_DATA_EFFDT). Name information is stored in the NAMES table with its own effective date. Address information is stored in the ADDRESSES table with its own effective date.

- Noneffective-dated data.

  Some Personal Data fields aren't linked to an effective date. In these fields, new entries overwrite and delete the previous entries. This means you can store only current information. Noneffective-dated data is stored in the Personal Data table (PERSON).

To update effective-dated information on the Personal Data pages:

1. Insert a new data row in the **Effective Date** field on the Name History page or the Address History page. Each of these pages can use different EFFDTs. They are not tied together.
2. Enter the date when the new personal data that you're entering will take effect.

   This date can be current or in the future.
3. Enter the new information on the appropriate Personal Data pages.
4. Save the pages.

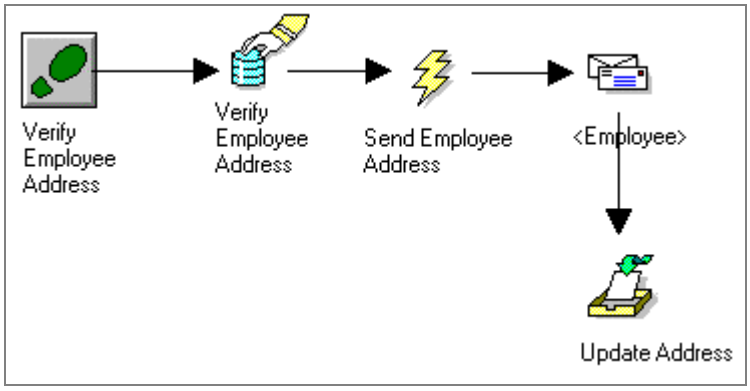
Note. PeopleSoft Human Resources also includes a workflow process for updating employee addresses.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Understanding Effective Dates"

Using Workflow to Update Employee Addresses

Keeping an employee's personal information current can be a full-time job in itself. With workflow, users who do not ordinarily have access to the PeopleSoft Human Resources system can update their address data, using an email program such as Lotus Notes, and send the information to your PeopleSoft Human Resources system.



Verify Employee Address workflow

Updating the Emergency Contact Information

The system updates an employee's emergency contact information automatically if you specify that the contact information is the same as the employee's contact information. When the emergency contact information is different from the employee's contact information, you

must maintain the emergency contact information manually on the Contact Address/Phone page.

To activate the automatic emergency contact address update:

1. Open the Contact Address/Phone page.
2. Select the **Same Address as Employee** and **Same Phone as Employee** check boxes *before* you update the employee address.
3. Select the type of address and type of phone number that is the same as the emergency contact.

   When you update the employee's address, the system automatically updates the emergency contact address. It also updates the Dependent/Beneficiary pages in the Benefits menu and the Payroll Data pages in the Employee Payroll Data menu.

   If the emergency contact address changes and is no longer the same as the employee's, clear the Same Address as Employee and the Same Phone as Employee check boxes. The system makes the address fields on the Contact Address/Phone page available, and you can enter a different address. After you clear the check box, the system no longer updates the emergency contact address automatically.

   Even if the emergency contact address is the same as the employee, you can enter a different phone number.
4. Use the Other Phone Numbers page to record emergency contact phone numbers for the emergency contact in addition to the primary number recorded on the Contact Address/Phone page.

(USF) Modifying Addresses

To enter a new address for an employee:

1. Open **Use, Personal Data, Name/Address.**
2. Insert a new data row.
3. Enter a new effective date for the new address information.
4. Enter the employee's new address information.

Updating Emergency Contact Address Information

The system also updates the Dependent/Beneficiary pages in the Benefits menu and the Payroll Data pages in the Maintain Payroll Data (USF) menu.

Updating Job Data

Use the Job Data component when you want to work with a person's historical job data. If you need to work with an employee's current job only, use the Current Job component and get faster system performance. You can work only with current and future job data on the Current Job pages. The following table shows the navigation for each component.

Component	*Navigation*
Job Data	Administer Workforce, Administer Workforce (XXX), Use, Job Data
Current Job	Administer Workforce, Administer Workforce (XXX), Use, Current Job

If you're using PeopleSoft Human Resources for the U.S. Federal Government, update job information using the pages discussed in "USF Processing Personnel Action Requests." If you're organizing part or all of PeopleSoft Human Resources by position, update most job-related data on the Position Data pages.

See Also

PeopleSoft Human Resources PeopleBook: Manage Positions, "Managing Position Data"

Job Data and Effective Dates

You usually update job data by inserting new effective-dated data rows into an existing employee record. Effective dates enable you to keep a complete chronological history of all your data and tables—whether you changed them two years ago or want them to go into effect two months into the future. With this information, you can "roll back" your system to a particular time to analyze position data or employee records. Or you can "roll forward" and set up tables and data before they take effect.

The system also uses effective dates to compare pages and tables to make sure that the prompt tables you see list only data that is valid as of the effective date of the page where you're working. For example, suppose you create a new department code with an effective date of May 1, 2004. If you enter a new data row (or update an existing row) on the Job Data pages that has an effective date *before* May 1, 2004, you won't see the new code as a valid choice when you select a department because the new code hasn't taken effect yet.

When you enter a new data row, the system copies the contents of the previous row into the new row—that way you do not have to retype any information that stays the same. (Ensure that you have the cursor on the data row you want to copy before you insert the new row.) The only new information you see is the effective date, which is set by default to the system date (usually today's date), which you can change if necessary.

To update effective-dated job data:

1. Open the Job Data - Work Location page for the employee whose record you want to change.

Always start in the Work Location page because that's where the Effective Date field is located. From there, you may have to go to other pages to enter more information about the personnel action that you're taking.

2. Insert a new data row.
3. In the **Effective Date** field, enter the date when the new action will take effect.
4. Select an action code for the change, such as *Transfer* or *Promotion.*
5. If applicable, enter a reason code to explain why this action is occurring.
6. Change any other data needed to complete the new action, either on this page or on other pages in the component.

   For example, when you promote an employee, you will most likely enter a new job code or perhaps a new position number on the Work Location page. You might also select a new salary administration plan/grade/step, enter a new compensation rate on the Compensation page, and enter a new business title and work phone on the Employment Information page.
7. Save the pages.

Entering Multiple Actions With the Same Effective Date

On occasion, you may need to enter more than one personnel action that takes effect on the same day. Entering two actions with the same effective date is especially common when you are tracking compound percentage pay increases that take effect at the same time. Use effective sequence numbers to combine multiple actions and specify which one to process first.

For example, a promotion (which produces a percentage pay increase) and a merit increase may take effect on the same day.

To enter multiple personnel actions with the same effective date:

1. Open the Job Data - Work Location Page for the person whose data you're updating.
2. Insert a new data row for the first personnel action.

   The effective date is set by default to the system date, usually today's date, which you can override if necessary. Leave the effective sequence number set at *0.*
3. Select an action code and, if appropriate, select a reason code from those you created in the Action Reason table.
4. Enter any other information you need to complete the action, either here or in other pages in the same component.
5. To enter the second action, return to the Work Location page and insert another data row.

6. Enter the same effective date as the first action, but enter an effective date sequence number of 1.

7. Select the appropriate personnel action and enter any other information required to implement the action, either here or in other pages.

Note. Use your mouse to move from the Effective Date field to the Effective Sequence field because the system views this field as a duplicate key and won't let you move any other way.

See Also

"(USF) Processing Personnel Action Requests," Multiple Actions With the Same Effective Date

(JPN) Appointment Reporting for Job Data Changes

When employees are newly hired or transferred, or have other job-related changes, many Japanese companies provide individual notifications of appointment to each employee. These notifications, known as Appointment Notifications *(Jirei)*, contain different information depending on the action and action reason entered on the employee's new job record.

Periodically, also, many companies distribute a listing of all new hires or transfers or other changes of job. This is known as the Appointment List *(Tsuutatsu)*.

The system provides a report page from which you can run the Appointment Notification report for individual employees.

The system also provides a report page from which you can run the Appointment List report for all employees.

When you run the Appointment Notification report, the report headings change according to the actions for which you are running the report—you can select actions and action reasons on the report page.

Reporting Appointments for Actions and Report Outputs

The following table illustrates what the appointment reports will contain according to the action for which you run the report for (report column headings down, Job record Actions across):

Heading/Actions	*Hire and Rehire*	*Transfer*	*Promotion*	*Retirement*
Announcement Date	✓	✓	✓	✓
Company Desc. (of employee's company)	✓	✓		✓
Department	✓	✓		✓
Supervisor Level	✓	✓		✓

Heading/Actions	Hire and Rehire	Transfer	Promotion	Retirement
Employee Status	✓			
Salary Plan			✓	
Salary Grade			✓	

Note. For the actions *Transfer* and *Promotion,* the system automatically populates the Reason field—for Promotion, with *Grade Advance* and for Transfer with *Employee Request* and *Internal Recruitment.* For all other actions shown in the table, you can select individual reasons (for the action you selected) or have the system select all reasons (for the action you selected).

Under the Japanese appointment reporting functionality, if you are recording an employee's simultaneous change of department and supervisor level, enter the department change first. With both changes having the same effective date, the change of supervisor level will have the higher sequence number and ensure that the system selects the changes for reporting on both the Appointment Notification and Appointment List.

In addition, when you record Job Data changes under the Japanese appointment reporting functionality, reports are available for the following actions:

- Hire
- Rehire
- Retirement
- Transfer
- Promotion

Sorting Appointment Lists Using Tree Structures and Definitions

To have the system sort your appointment lists by department and supervisor level, use the standard tree building features to create a tree structure and reporting definition for your supervisor levels and a reporting definition for your departments. You then need to select only the Refer to the Tree Manager check box on the report page to have the system use your DEPT_SECURITY tree and, depending on the Job action and reason to which the appointment information relates, your SUPERVISOR_LEVEL tree.

See Also

Entering Multiple Actions With the Same Effective Date

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Appendix: PeopleSoft Application Fundamentals for HRMS Reports," Administer Workforce Reports

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Administering PeopleSoft Security

Security Considerations for Updating Job Data

When you update a job record, keep in mind two special security issues.

Security and Effective Date Sequence Numbers

When you transfer employees from one department to another using a data row that contains an effective-date sequence number, the system currently allows users with security access to the old or new department to have access to all the employee data. PeopleSoft delivers the system this way because implementing security in system views specific to the function Max (effseq) on PS_JOB would slow down online response time.

For example, when you transfer an employee from Department 1 to Department 2 and give the employee a promotion on the same day, operators with access to either Department 1 or 2 have access to the employee data because the transfer data row contains an effective-date sequence number.

You can prevent this by changing the security views for the PeopleSoft applications you use. Keep in mind, however, that making the change affects system performance.

Security for Transfers Between Departments

PeopleSoft Human Resources enables users to assign employees into departments they cannot access for updates. If you want to prevent a user from transferring an employee into a department for which they do not have access, use the PeopleSoft Human Resources DEPT_TBL_ACCESS view, which shows only those department IDs that a user can access based on the security permission lists to which they belong.

Note. If you choose to use this view, you must create a permission list for users who have access to all departments so that they can perform transfers.

See Also

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

Personnel Actions and Employee Status

When you select a personnel action to change a person's job data, the system may change the person's employee status. For example, when you select *Retirement,* the system changes the employee status from *Active* to *Retired.* Similarly, if you terminate an employee contract due to death, the system changes the employee status from *Active* to *Deceased.* The employee status is based on either the personnel action or, in a few cases, the *reason* for the action, such as death. A change in employee status can affect the PeopleSoft Benefits modules, PeopleSoft Payroll processing, and PeopleSoft Pension Administration. For example, a promotion or a job reclassification might affect an employee's benefit coverage, or you might need to suspend benefit coverage during a leave of absence or a suspension.

Here's how the system sets the employee status:

When you Select the Personnel Action	*The System Sets the Employee Status to*	*And Triggers Payroll Processing for PeopleSoft Payroll for North America and the Payroll Interface*
Hire Rehire Return from Leave Return from Disability Additional Job Recall from Suspension/Layoff Assignment	*Active*	Yes
Leave of Absence Short-term Disability Long-term Disability	*Leave of Absence*	No
Paid Leave of Absence Short-term Disability with Pay Long-term Disability with Pay	*Leave with Pay*	Yes
Retirement with Pay	*Retired with Pay*	Yes
Terminated with Benefits Terminated with Pay	*Terminated with Pay*	Yes
Layoff Suspension	*Suspended*	No
Retirement	*Retired*	No
Assignment Completion Termination	*Terminated*	No
Termination (reason of Death)	*Deceased*	No
Pay Rate Change Demotion Data Change Earnings Distribution Change Job Reclassification Position Change Probation Completion of Probation Promotion Transfer	The same status that's in the previous data row. If no previous data row exists, the system sets the status to *Active.*	Varies

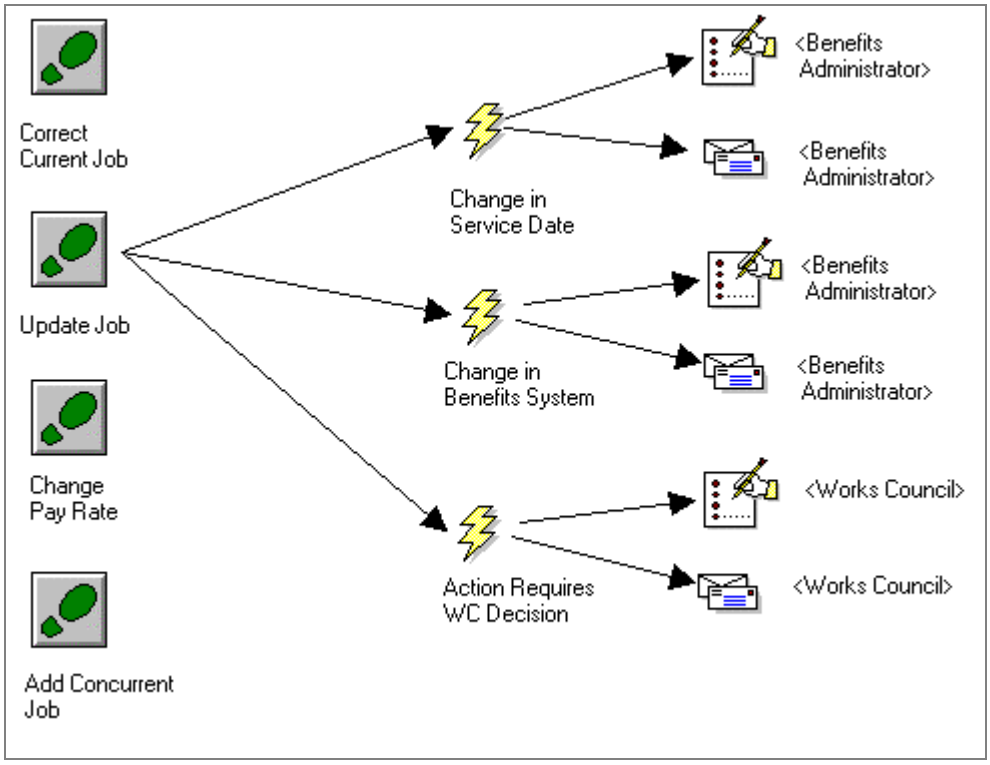
Note. If your organization uses PeopleSoft Payroll for North America, the system does not generate payroll paysheets for employees whose status is *Retired* or *Terminated.* If you need to pay employees for a partial pay period or for a time after they leave the company, select the personnel action *Retired with Pay* or *Terminated with Pay.*

See Also

PeopleSoft Payroll for North America PeopleBook, "Maintaining Payroll Data "

Using Workflow to Maintain Job Data

The Maintain Job Data workflow automates the processes you use to update employee service dates and to change employee benefits programs. If you have a German workforce, this workflow also initiates the review of personnel actions by the Works Council for jobs requiring Works Council approval.



Maintain Job Data workflow

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Using PeopleSoft Workflow," Using Workflow to Maintain Job Data

Entering Promotions

A promotion usually involves a change of salary grade and new job code. The following table shows the pages and fields you typically update when you enter a promotion. You may need to update additional pages and fields, as well.

Affected Pages	*Affected Fields*	*Comments*
Work Location	Effective Date Action Code: *Promotion* Reason Code (if applicable) Position Number	All the entries on the page could change when you enter a promotion, depending on the data for the former job and the new job. If you're organizing part or all of PeopleSoft Human Resources by position, review *PeopleSoft Human Resources PeopleBook: Manage Positions*
Job Information	Job Code Regular/Temporary Full/Part Standard Hours Work Period FTE Shift Shift Rate Contract Number Local country fields	All the entries on the page could change when you enter a promotion, depending on the data for the former job and the new job. If you're organizing part or all of PeopleSoft Human Resources by position, review *PeopleSoft Human Resources PeopleBook: Manage Positions*
Compensation	Salary Administration Plan/Grade/Step Compensation Rate	Update Salary Plan/Grade/ on the Use - Salary Plan page. Also update compensation information on the Compensation page.
Employment Information	Business Title Work Phone	Update these fields as needed.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Multiple Components of Pay," Changing a Compensation Package

Entering Departmental Transfers

Enter a transfer action when you want to assign a person to a new department without changing the person's job code. A transfer also implies that the employee's salary grade and compensation remain the same.

If you're organizing part or all of PeopleSoft Human Resources by position, use the transfer action to move an employee from one position to another. To move the position *and* the incumbent to a new location or department, use the Position Data pages.

The following table shows the pages and fields you typically update when you enter a transfer. You may need to update additional pages and fields, as well.

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action Code: *Transfer* Reason Code (if applicable) Department	The system automatically enters a new location if it finds matching location setIDs in the Department table and the Tableset Record Group Control for the business unit you're using.
Employment Information	Supervisor's ID Business Title Work Phone	The system enters the employee ID of the employee's new department manager in the Supervisor's ID field if it finds matching location setIDs in the Department table and the Tableset Record Group Control for the business unit you're using.

See Also

PeopleSoft Human Resources PeopleBook: Manage Positions, "Managing Position Data"

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Regulating PeopleSoft HRMS System Data"

Tracking Leaves of Absence

Many employees take a leave of absence at some point in their careers. Leaves can occur for any number of reasons, including sickness, vacation, maternity or paternity leave, jury duty, suspensions, or unpaid leave.

If your company tracks employees' absence history, you can acknowledge a leave of absence in the Monitoring Absences pages and Job Data pages.

The following table shows the pages and fields you typically change when you enter a leave of absence. You may need to update additional pages and fields, as well.

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action: *LOA (leave of absence)* or *Paid LOA (leave with pay)* Reason Code (if applicable)	
Employment Dates	Expected Return Date	Enter the date you expect the employee to start work again. When you save the pages, the system displays the day before the leave of absence date as the date last worked. You can change it if necessary. When the employee returns from leave, the system clears this field.

Tracking Multiple Types of Leave for One Employee

You might encounter situations where you need to enter multiple types of leave for the same employee. For example, an employee might take a six-week leave with disability pay, take the following two weeks with vacation pay, and then take an additional month without pay.

You can enter all these leave types at the same time by inserting a new data row in the Work Location page for each type of leave and entering the effective date when each leave type begins. Then move to the appropriate page to make any other changes pertaining to that particular leave, such as compensation changes.

Entering Returns from Leave

Most employees eventually come back from leaves of absence and resume their job duties. In fact, you often know at the time employees begin their leaves when they plan to return to work. Enter the return from leave information at the same time you enter the leave of absence, or as soon as you have a confirmed return date.

The following table shows the pages and fields you typically change when you enter a return from leave. You may need to update additional pages and fields, as well.

Affected Pages	*Affected Fields*	*Comments*
Work Location	Effective Date Action: *Return from Leave* Reason Code (if applicable)	
Employment Dates	Expected Return Date	When you save the pages, the system clears this field.

Entering Terminations and Retirements

When an employee retires or leaves your organization for some other reason, you enter the termination into the person's record.

The following table shows the pages and fields you typically change when you enter a termination or retirement. You may need to update additional pages and fields, as well.

Affected Pages	*Affected Fields*	*Comments*
Work Location	Effective Date Action: *Terminated, Terminated with Pay, Terminated with Benefits, Retirement,* or *Retirement with Pay* Reason Code, if applicable	The system treats the effective date you enter as the day the termination starts and the first day the employee is no longer paid. For example, if the employee's last day of employment is June 1, set the effective date of termination or retirement as June 2 because that's when the termination begins. If you set it as June 1, the employee wouldn't be paid for the last day of work.

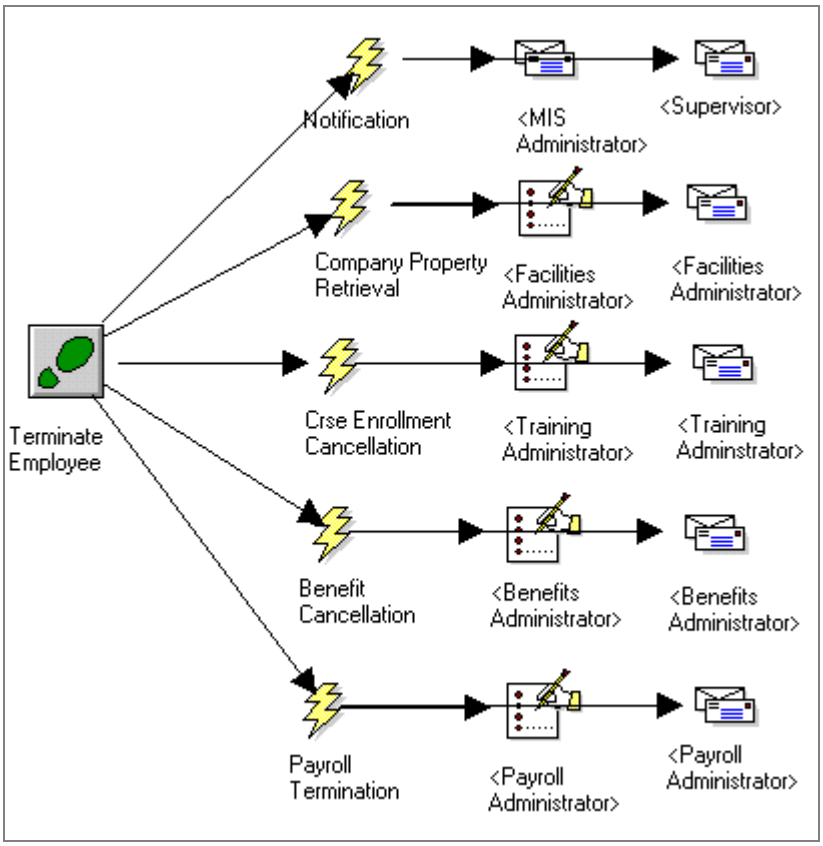
Affected Pages	*Affected Fields*	*Comments*
Employment Dates	Termination Date	The system displays the day *before* the effective date as the termination date and last date worked. If you rehire the employee, the system clears both these fields. When an employee returns from leave, the system clears only the Date Last Worked field.

Using Workflow to Terminate Employees

The Terminate Employee workflow streamlines the termination process and ensures that you process individuals leaving your organization according to your company's business processes.

When a user terminates an employee contract on the Job pages, the Terminate Employee workflow generates worklists and emails, routing them to different function administrators to notify them of the termination to be processed. For example, if an employee was enrolled in or awaiting a course, then the system sends an email and a worklist to the training administrator. The email carries important information such as the employee ID and the date of termination. The worklist pulls the administrator directly into the page to process the employee.

The following business process map illustrates the Terminate Employee workflow.



Terminate Employee workflow

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Using PeopleSoft Workflow," Using Workflow to Terminate Employees"

Entering Deaths

The following table shows the pages and fields you typically change when you enter a termination due to death.

Affected Pages	*Affected Fields*	*Comments*
Work Location	Effective Date Action: *Terminated* Reason Code: *Death*	The system treats the effective date you enter as the day the termination starts and the first day the employee is no longer paid. For example, if the employee's last day of employment is June 1, set the effective date of termination or retirement as June 2 because that's when the termination begins. If you set it as June 1, the employee won't be paid for the last day of work.

Affected Pages	Affected Fields	Comments
Identity/Diversity	Date of Death	Record the date the employee died.
Employment Dates		The system displays the termination effective date as the termination date and the day before the termination date as the date last worked. The system uses these dates, and the effective date, in payroll processing and reporting.

Entering Rehires

You may want to rehire an employee who worked for your company in the past. Information on a rehired employee is probably already in PeopleSoft Human Resources, unless the employee data was deleted or archived. Before you rehire employees, you may want to make sure their personal, employment, and job data is current. If a rehired employee doesn't have a record in the system, do not use the update pages. Instead, follow the new hire process described in Hiring Your Workforce.

Because you probably rehire an employee whose previous job was in a department (organizational entity) for which you do not have security access, it's helpful to provide security access to all departments to at least one operator performing rehires.

The following table shows the pages and fields you typically change when you enter a rehire. You may need to update additional pages and fields, as well.

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action: *Rehire* Reason Code, if applicable	You can rehire only employees whose employee status is *Terminated, Terminated with Pay, Terminated with Benefits, Retired,* or *Retired with Pay.*
Employment Dates	Company Seniority Date Service Date Rehire Date Service Months Service Days	You may want to change the company seniority date and service date. The company seniority date can serve as the basis for the employee's seniority, or you can use it for other tracking and reporting purposes. The service date is the date on which the employee's service ranking is based and is used primarily for benefit-related matters. When you save the pages, the system automatically completes the rehire date and recalculates the service months and days.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Administering PeopleSoft Security"

Assigning Employees to Different Positions

If you're organizing part or all of PeopleSoft Human Resources by position, you often move employees from one position to another as a result of promotions, transfers, rehires, or other personnel actions. Because both position and employee data are already in the system, you connect the two by selecting a position number, entering the effective date of the assignment, and entering any exceptions to the default data.

The following table shows the pages and fields you typically change in the Job Data component when you enter a change of position. You may need to update additional pages and fields, as well. When you change an employee assignment, the system also updates the Position Data, Position Location page: It automatically calculates and displays the new head count and shows the appropriate indicator in the Open/Filled field.

Affected Pages	*Affected Fields*	*Comments*
Work Location	Effective Date Action: *Position Change, Transfer, Promotion,* or *Rehire* Reason Code, if applicable Position Number	After you enter a position number, the system automatically completes position-related fields, including job code, department, and location. The system enters the position entry date as the effective date of the position change action. You cannot change the position entry date. To change the entry date, you must change the effective date for the position change action. To override the position defaults, select the Position Data Override check box, which makes the previously unavailable fields available for entry, such as Job Code and Department. You can then enter exceptions in these fields. The Position Management Record check box is unavailable for entry. The system uses this check box to indicate that it has automatically inserted a data row on the Job Data pages due to changes you've made to fields on the Position Data pages that overlap with fields here. **Note.** If you override the defaults, you must maintain the employee data manually—the system won't update position data automatically again until you clear the Position Data Override check box. The system issues a warning message if you assign an employee to a position that has already been filled by another employee and if a new employee appointment exceeds the maximum head count for that position.

See Also

PeopleSoft Human Resources PeopleBook: Manage Positions, "Managing Position Data"

(USF) Tracking Employee Appraisals

Track the results of career plan, salary, or performance reviews in PeopleSoft Human Resources using the Employee Appraisal pages. Enter detailed information on career plans, salary reviews, and performance reviews.

Enter comments from multiple reviewers, choose from multiple rating scales, rate employees according to various factors, and give them a final rating. If employees have career plans, the system inserts goals and objectives into reviews; any incomplete goals are automatically carried forward to the next review period. When you indicate that employees have achieved goals, the system updates their career plans to reflect the changes.

Find the Employee Appraisal pages in the Manage Performance, Plan Salaries, and Plan Careers menus. To enter review information, use the pages in any of these menus. They are the same pages.

See Also

PeopleSoft Human Resources PeopleBook: Manage Performance, "Managing Performance," Associating Positions With Performance Plans

PeopleSoft Human Resources PeopleBook: Plan Salaries, "Reviewing Employee Performance"

Entering Salary Changes

One of the most common ways to update job data is by changing an employee's salary. Change an employee pay rate in either the Pay Rate Change pages or the Job Data pages. The information you update is the same in either component, but the Pay Rate Change pages are particularly useful if you want only to change the salary amount (not a promotion or transfer), because they are a smaller component and are quicker to use.

If you're using the salary planning feature in the Plan Salaries menu, load planned increases using Process, Load All Salary Changes, or Load Salary Changes for Dept.

Changes must be approved and entered for effective dates falling within the budget period, and the new amounts must be in the currency authorized for that department. The process automatically inserts a new data row on Job Data and loads the new figures.

See Also

PeopleSoft Human Resources PeopleBook: Plan Salaries, "Administering Salary Plans, Grades, and Steps and Reviewing Employee Performance"

Using the Pay Rate Change Pages

The following table shows the pages and fields you typically change when you enter a promotion. You may need to update additional pages and fields, as well.

Affected Pages	*Affected Fields*	*Comments*
Work Location	Effective Date Action Code: *Pay Rt Chg* (pay rate change) Reason Code (if applicable)	Enter *Pay Rate Change* to enter a salary change for an employee that isn't related to a change in salary grade or job code. If the pay rate change results from a salary grade or job code change, enter the change as a promotion or some other action.
Salary Plan	Salary Administration Plan/Grade/Step	Enter a new salary step if the pay rate change involves a change in step. You cannot select a new grade because, if the pay rate resulted from a change in salary grade, you would enter the rate change as part of a promotion or other action. If you've selected the Multi-Step/Grade check box on the Installation Table page and you enter a new step on this page, the system automatically completes the compensation rate for that step—unless you have distributed the employee's earnings by amount on the Job Earnings Distribution page. For job earnings distributions, manually update the distribution for the new rate.
Compensation	All fields	To enter a new pay rate, enter a new compensation rate, rate change amount, or rate change percent. When you enter any one of these three amounts, the system automatically calculates the other two. Based on the compensation rate and frequency, the system calculates and displays the hourly rate, daily rate, monthly rate, and annual rate for this employee. If you've selected the Multi-currency check box on the Installation Table page and entered the compensation rate in a different currency from your base currency, the system converts the rates to the base currency and compares them with the ranges specified for this salary grade in the Salary Grade table. If the rates exceed the salary range, a warning message appears. If necessary, enter a new annual benefits base rate for calculating this employee's benefits. The rating scale (review rating scale and salary matrix guidelines) is set by default to the value you've associated with the salary grade in the Salary Grade table. If you track the details of an employee review in the Employee Review pages, the system issues a warning message if you select a review rating scale that differs from the scale in the employee record.

Affected Pages	*Affected Fields*	*Comments*
		If you're using salary increase plans to administer increases, the system updates the employee record with the salary review rating you've entered in the Salary Increase Plan pages and displays the review date. If you're using salary increase guideline matrices to administer salaries, when you enter a compensation rate, the system compares the rate you enter against the values in the Salary Matrix Code page. If the amount you enter is over or under the guidelines, the system issues a warning message. The system calculates the Compa-Ratio (or percent through range calculation) based on the salary plan and grade and in the base currency your organization uses, which you specify on the Installation Table page. The system also calculates the percent through range. This figure determines where an employee falls in the range by taking the salary minus the minimum divided by the spread. For example, if an employee has a salary of $26,000 in a range of $25-30,000 for the salary grade, the percent through range would be 20 percent.
		Also modify any other information that has changed because of the pay rate change, such as holiday schedule, pay group, employee type, standard hours, or work period in Job Data, Payroll or Job Information.
Job Earnings Distribution		Update as needed to distribute the employee's compensation hours or earnings.
Employment Dates	Date Last Increase Incr Dt (increase date)	When you change an employee's salary, the system updates these fields. Exceptions are cost-of-living and other across-the-board increases.

Note. The system generates the warning message about salary increase guidelines only when you're using the Pay Rate Change pages, not the Job Data pages. If you want the message to appear in both sets of pages, modify the system to process this.

Viewing Multiple Job Information

View multiple job information on the Multiple Jobs Inquiry page. Before using this page, select Multiple Jobs Allowed on the PeopleTools Options menu.

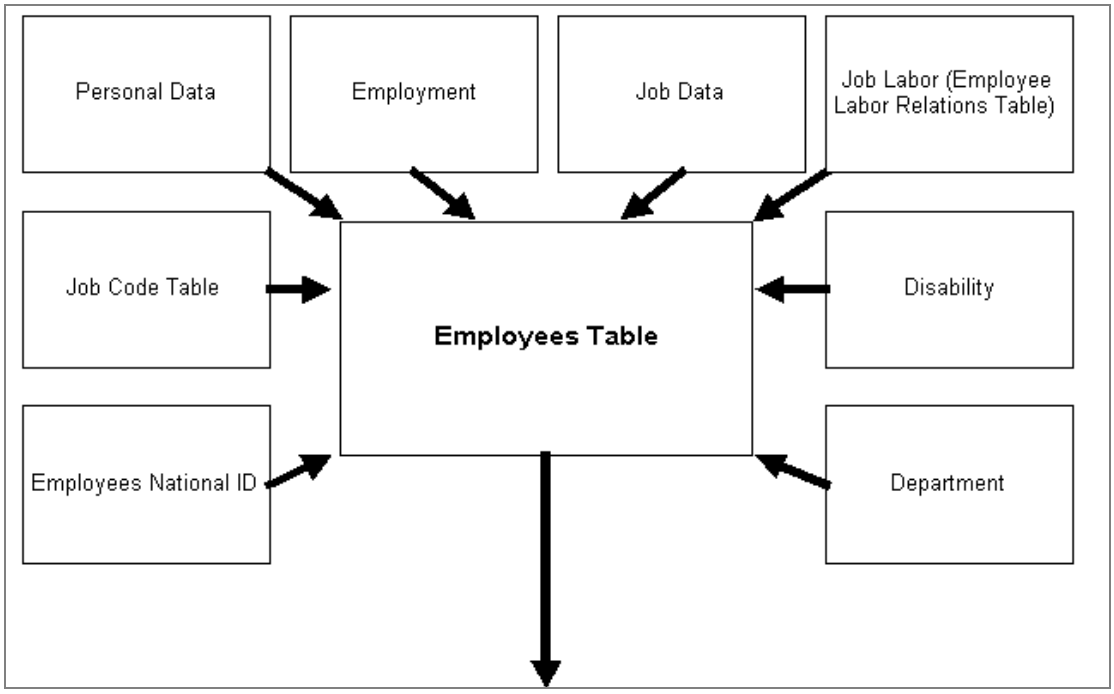
Page Used When Updating Information for Multiple Jobs

Page Name	*Object Name*	*Navigation*	*Usage*
Multiple Jobs Inquiry	MULTIPLE_JOBS	Administer Workforce, Administer Workforce (GBL), Inquire, Multiple Jobs, Multiple Jobs Administer Workforce, Administer Workforce (USF), Inquire, Multiple Jobs,	When employees have multiple jobs, view a summary of all jobs and changes in employment status. Select an As Of Date to select from all the job records where the employee's job indicator status was changed. The system lists the records by as-of date, which is the date when the job record change took effect.

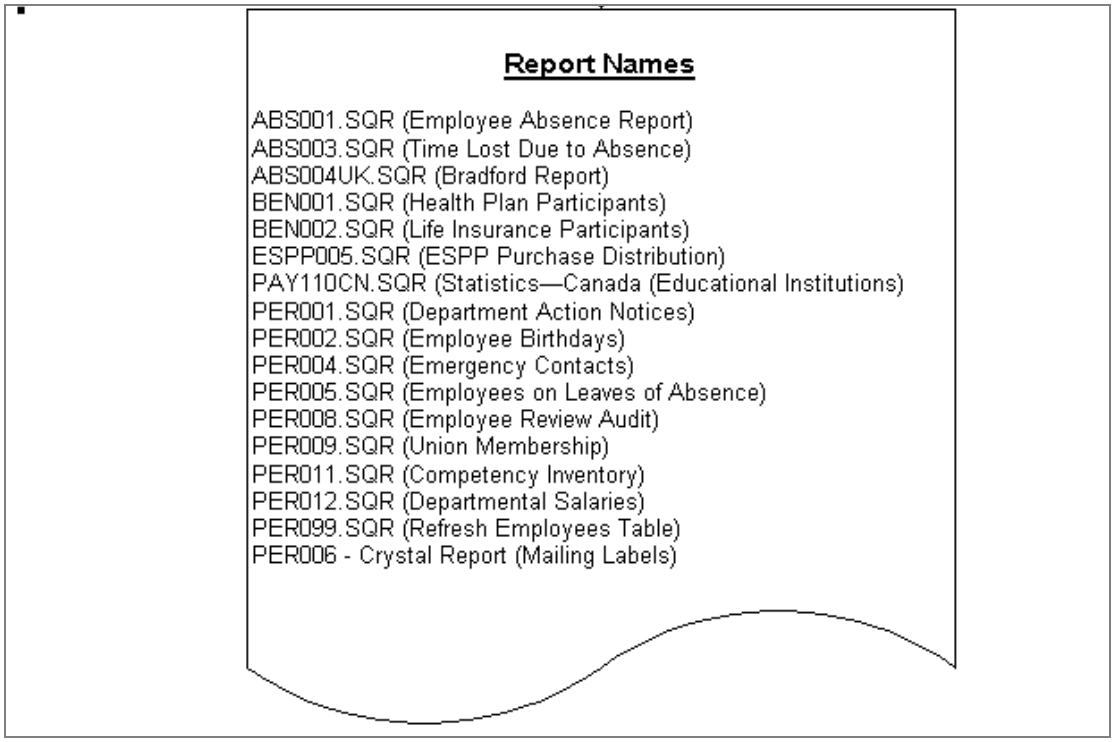
Refreshing the Employees Data and Personal Data Tables

Employees Data Table

To generate standard PeopleSoft Human Resources reports quickly, many human resources reports pull data from the Employees table (PS_EMPLOYEES). To make reporting in PeopleSoft Human Resources more efficient, this table combines in one place—in an "extract file"—information from the following tables: PERSON, PERS_DATA_EFFDT, NAMES, ADDRESSES, PERSONAL_PHONE, Job (JOB), Employment Data (EMPLOYMENT), Job Code (JOBCODE_TBL), Department (DEPARTMENT_TBL), Employees National IDs (PERS_NID), Job Labor (JOB_LABOR), and Disability (DISABILITY). The extract file's sole purpose is as a report source. Because it isn't updated dynamically when you hire employees or update their data (doing so would have negative online processing impact), you must refresh the Employees table before running any reports. When you run this report, the system updates the table with data valid before or on the as-of date you specify.



Updating the Employees table using the Refresh Employees Table process (1 of 2)



Updating the Employees table using the Refresh Employees Table process (2 of 2)

A useful feature of the Employees table is that you can refresh it to show a specific date, so you can report based on how things were at that time. This might be useful if an organization

needed to reconstruct its organization over the last several years to research its promotion policies.

Update the Employees table using the Refresh Employees Table process before running any of these reports so that the report contains all changes made to your employee files.

Personal Data Table

Human Resources reports also pull data from the Personal Data table. This table combines information from these tables: PERSON, PERS_DATA_EFFDT, NAMES, ADDRESSES, PERSONAL_PHONE. Like the Employees Data table, the Personal Data table is a report source only. It updates through the process described below. The PERSONAL_DATA table is kept in sync with the online changes using a Message Subscription process on the message PERSON_BASIC_SYNC. This means that any process that publishes the PERSON_BASIC_SYNC message will cause PERSONAL_DATA to be updated. You may want to refresh the Personal Data table before running reports, but the online process should be keeping it up to date. You can refresh PERSONAL_DATA at any time without affecting the online updates if you suspect that something did not get updated, or you are having problems with the message queue.

Page Name	*Object Name*	*Navigation*	*Usage*
Refresh Employees Table Page	PRCSRUNCNTL	Define Business Rules, Administer HR System, Process, Refresh PS_EMPLOYEES table Administer Workforce, Administer Workforce (USF), Process, Refresh Employees Table	Reflect back to a specific date or period for employee data reporting.
Refresh Personal Data Table	PRCSRUNCNTL	Define Business Rules, Administer HR System, Process, Refresh PS_PERSONAL_DATA table Administer Workforce, Administer Workforce (USF), Process, Refresh PS_PERSONAL_DATA table	Updates the PS_PERSONAL_DATA table.

As Of Date Indicate the As Of Date to execute the Refresh Employees Table process. The process selects the new data based on the As of Date you enter and populates the Employees

table. It will include only employees who are active, on leave of absence, or suspended. The process excludes any *terminated* employees.

Note. The Employees table does not update interactively as you change the pages the tables extract data from. This means that the data in these tables, and in your reports, is only as current as the last time you ran the update program.

Additional Processes to Facilitate Reporting

The Administer Workforce Process menus contain these additional processes that you can use to generate several reports at the same time, without having to select and run each separately from the Report menu.

Process	*Description*
Ad-Hoc Process Request	You can choose to run several or all Administer Workforce reports that do not require parameters.
As-of Date Request	You can choose to run several or all Administer Workforce reports for which you specify an as-of date.
Calendar Year Request	You can choose to run several or all Administer Workforce reports for which you specify a calendar year.
From/Thru Dates Request	You can choose to run several or all Administer Workforce reports for which you specify a from date and thru date range.

CHAPTER 11

Updating Employee Data Using Mass Update Processes

This chapter provides an overview of mass update processing and discusses how to:

- Set up mass update definitions.
- Process mass updates using mass update definitions.
- View the results of mass update processes.

Understanding Mass Update Processing

Mass update processing enables you to make changes to the data of large groups of employees. Update employee data by groups (using the groups you create using PeopleSoft Group Build), position number, job code, establishment, or department.

Use the Mass Update Definition page to set up templates keyed to Mass Update IDs. These templates identify the parameters of the updates and enable you to save and reuse parameters. To execute the updates, use the Mass Update run control page and enter the Mass Update IDs that you want to execute. Choose to execute just one or a number of IDs.

The process uses the business component related to the data slated for update (that is, for job data, use the JOB_DATA business component) and retrieves the data for the each employee in the group. It then assigns the new values for the employees and saves the change, triggering any business rules that apply to this business component.

The Mass Update process creates an execution result record to trace the statuses of all modifications for all employees. Use the result record to determine the source of any errors, correct the problems, and then run the process again for just the affected employees.

Tips For Running the Mass Update Process

For a successful mass update:

- Test your update on a small group first.
- Use the correction option only if you are certain you want to override data. If at all possible, add a new effective dated row, instead.
- Familiarize yourself with the online transaction before trying to automate it using the Mass Update process.

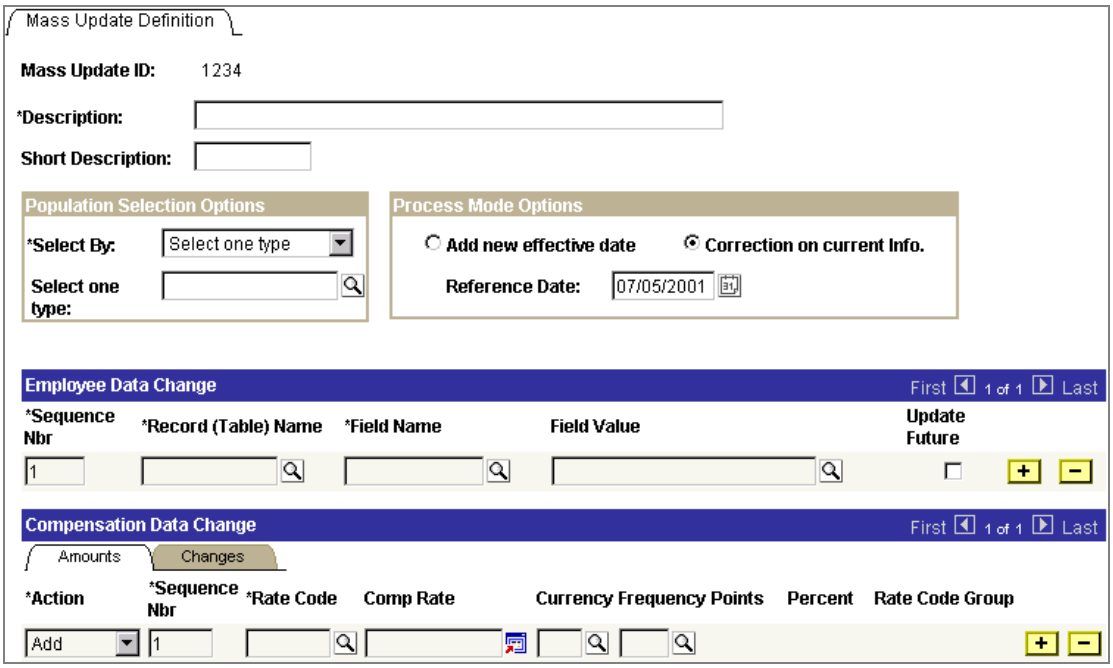
- To enhance performance, group change lines (using sequence numbers) by record when possible. By keeping all changes for a record together, the system opens the component only once. When changes to a record are interspersed with other record changes, the system must keep moving between records.
- Create several simple Mass Update IDs instead of trying to create a complicated one that changes everything. In addition to being more flexible, it's easier to identify the source of errors.

Pages Used to Process Mass Updates

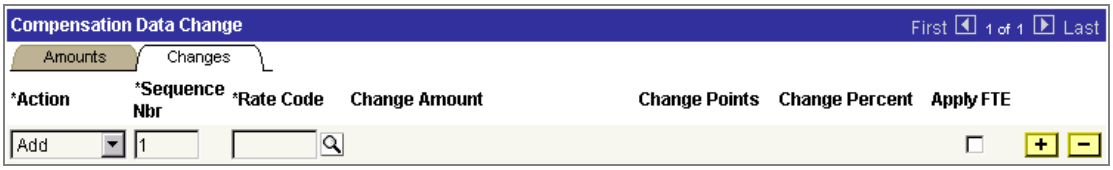
Page Name	*Object Name*	*Navigation*	*Usage*
Mass Update Definition	MU_MASS_UPDATE_TABLE	Define Business Rules, Administer HR System, Setup, Mass Update Definition	Set up mass update definitions to process mass updates.
Mass Update	RUNCTL_MASSUPD1	Define Business Rules, Administer HR System, Process, Mass Update	Run mass updates using Mass Update IDs.
Mass Update Result	MU_EXEC_RESULT	Define Business Rules, Administer HR System, Inquire, Mass Update Result	View the statuses of mass updates.

Setting Up Mass Update Definitions

Access the Mass Update Definition page.



Mass Update Definition page (1 of 2)



Mass Update Definition page (2 of 2)

Select By

Use to indicate how you want the system to select employees for mass update: ***Group ID, Position Number, Job Code, Establishment,*** or ***Department.*** When you make a selection here, the system displays related fields below for you to specify which ***Group ID, Position Number, Job Code, Establishment,*** or ***Department*** you want the process to update. For example, if you selected ***Group ID***, the system displays the **Group ID** field. The update process will select all employees with the group ID you specify.

Note. To set up mass update definitions by group, you must grant group security to the Mass Update Definition page. To set up a mass update definition by department, the user must have access to the selected department.

See Also:

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Administering PeopleSoft Security

PeopleTools PeopleBook: Security

Process Mode Options	Indicate whether you want the process to correct the current information or add a new effective dated row.
Correction on current info and **Reference Date**	Select to change incorrect data and override information in the employee's records. The system corrects the record that is or was effective as of the reference date you enter.
Add new effective date and **Reference Date**	Select to insert a new effective dated row using the reference date as the new effective date. If a record already exists with this effective date, the system inserts a row with the date and a sequence number. If the record is not organized by effective sequence, the system produces an error message warning you that if the update were to go ahead, it would overwrite data. This option inserts new information and does not override previous data.
Employee Data Change	Use the fields in this group box to define which fields to update and with what values. To update some fields, you may have to update others. For example, to enter a new phone number, you have to also update the phone type information.
Sequence Nbr (sequence number)	Indicate in what order the system should update the fields. Some fields cannot be updated without specifying several other related fields in the same mass update ID. For example, to specify a Location field on the JOB record, you must first specify the appropriate business unit. The Business Unit field should be processed first and should have an earlier sequence number than the Location field. Fields that are managed with a key, such as phone information, also require that you use a sequence number to ensure that the key is updated first. For example, before the mass update can update a phone number, it needs to update the phone type. When setting up the mass update, ensure that phone type is an earlier sequence number than the phone number. The system warns you if you need to add a related or key field. **Note.** Be careful to sequence fields appropriately. The Mass Update process does a preliminary check during the saving process, but it cannot prevent all errors.
Record (Table) Name	Select the record containing the field that you want to update.
Field Name	Select the field whose value you want to update.
Field Value	Select or enter the value you want to enter in the field you selected.

Update Future When you select this option, the mass update updates all existing future effective dated rows (rows that have an effective date later than the Reference Date) in addition to the effective dated row it is adding or correcting. This option is not applicable to non-effective dated data.

Specifying Job Actions and Action Reasons

Enter a row for action and action reason field so that you can enter values to for the changes you make with the Mass Update process. It's important that you include an action and action reason value when making changes to employee job data. If you do not specify an action and action reason for inserting a new effective dated row in an employee's Job or Personal Data record, the Mass Update process inserts the following values in the new record:

Change Type	*Action*	*Action Reason*
Employee Data Change	Data Change (DTA)	None
Compensation Data Change	Pay Rate Change (PAY)	Other (OTH)

Compensation Data Change Correct or add compensation amounts (using the Amounts tab), but only add compensation changes (using the Changes tab).

Action Select to ***Add, Change,*** or ***Delete*** compensation data.

Add: When you select this option and the rate code already exists in the employee compensation package, the system adds the compensation element to the existing package with a new number.

Change: When you select this option, the system can process changes to employees with only one compensation element or employees who have previous compensation rows with the same rate code.

Delete: If you select this option, the system removes all compensation elements with the rate code specified here from the employee compensation package.

The Mass Update process can only change or delete compensation packages that contain rate code information.

Sequence Nbr (sequence number) The system orders the rows in this grid using this number in ascendant order.

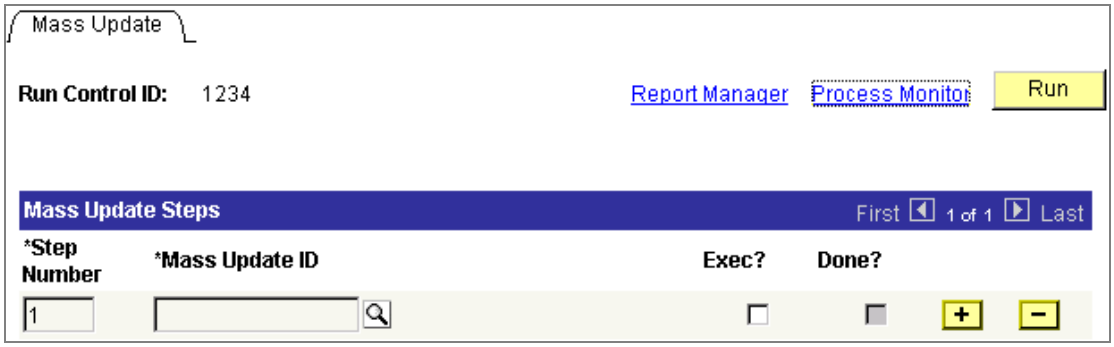
Rate Code Select the rate code whose associated data you want to add, change, or delete. When you add compensation data, the system inserts the compensation rate code for any new compensation effective sequences.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Multiple Components of Pay

Processing Mass Updates Using Mass Update Definitions

Access the Mass Update page.



Mass Update page

Step Number Enter the order in which to process this step.

Mass Update ID Select the mass update ID you want to process.

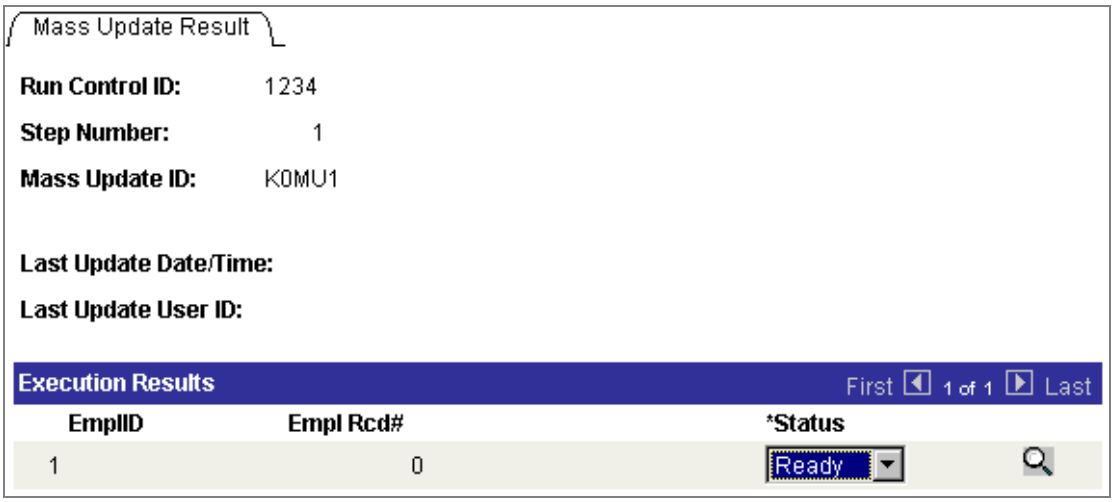
Exec? (execute?) Select to execute a row after the previous row has completed. Select to execute your first step.

Done? The system selects this check box when it has processed the mass update ID in the step. If the process completes, the system displays a link to the Mass Update Result page where you can review the results of the update.

Run Click to run the Mass Update process.

Viewing Mass Update Process Results

Access the Mass Update Result page.



Mass Update Result page

Execution Results

Status Displays the status of the mass update change to this employee's record.

If the status is ***Failure,*** the process was unable to make the change. You can correct the problem and come back to this page to reset the status to ***Ready,*** or you can opt to ***Cancel*** the process for this employee.

When you select *Ready,* you can rerun the process.

Details Select to view the message log for this employee. The message log displays the errors (if any) that occurred during the mass update process.

CHAPTER 12

Managing Labor Relations

This chapter provides an overview of managing labor relations and describes how to:

- Set up union data.
- Set up bargaining unit tables for the United States and Canada.
- Set up works councils.
- Set up the German works council business process.
- Enter German works council decisions.
- Track disciplinary actions.
- Track grievances.
- Set up labor relations data for U.S. federal government employers.
- Enter union negotiability appeals for U.S. federal government employers.
- Create labor relations classifications for U.S. federal government employers.
- Use the disciplinary tracking system for U.S. federal government employers.

Understanding Labor Relations Management

In many countries, some, or maybe all, of your employees are organized under collective labor agreements. This makes labor management a critical element of legally employing your workforce.

PeopleSoft Human Resources enables you to enter and track labor-related information for each employee. You can track disciplinary actions your organization takes against employees, as well as grievances filed by one or several people, including employees, applicants, and unions on behalf of several union members.

See Also

"Hiring Your Workforce"

Common Elements Used in This Chapter

Union Contact Number	The union contract number (the primary contact is number 1).
Contact Name	The union or bargaining unit's contact name.
Union Steward	Enter the name of the employee who serves as the liaison between your company and the union.
Life Insurance	Indicate the amount of life insurance the union or bargaining unit offers for its members.
Vacation Plan	Enter the vacation plan that this union offers to its members.
Sick Leave Plan	Enter the sick leave plan that this union offers to its members.
Callback Minimum Hours	Enter the callback minimum hours per day for which bargaining unit members get paid if they are called in to a job.
Partnership Council	Select if this union is a member of a partnership council.
Partnership Council Date	If this union is or will be a member of a partnership council, enter the date this event took or will take place.
Partnership Agreement	Select if this union has entered into a partnership agreement.
Partnership Agreement Date	If this union is or will enter into a partnership agreement, enter the date this event took place or will take place.
Days To Complete	Use for establishing follow-up dates and other suspense items.

Setting Up Union Data

If you're administering a workforce, you or others in your company might need information on union employees for collective bargaining agreement negotiations, grievance tracking, or salary step increases. Use the Union Table component to define codes for unions to which company employees belong.

In this section, we discuss how to:

- Enter general union details.
- Enter information on union contract terms.
- Enter additional contract terms.

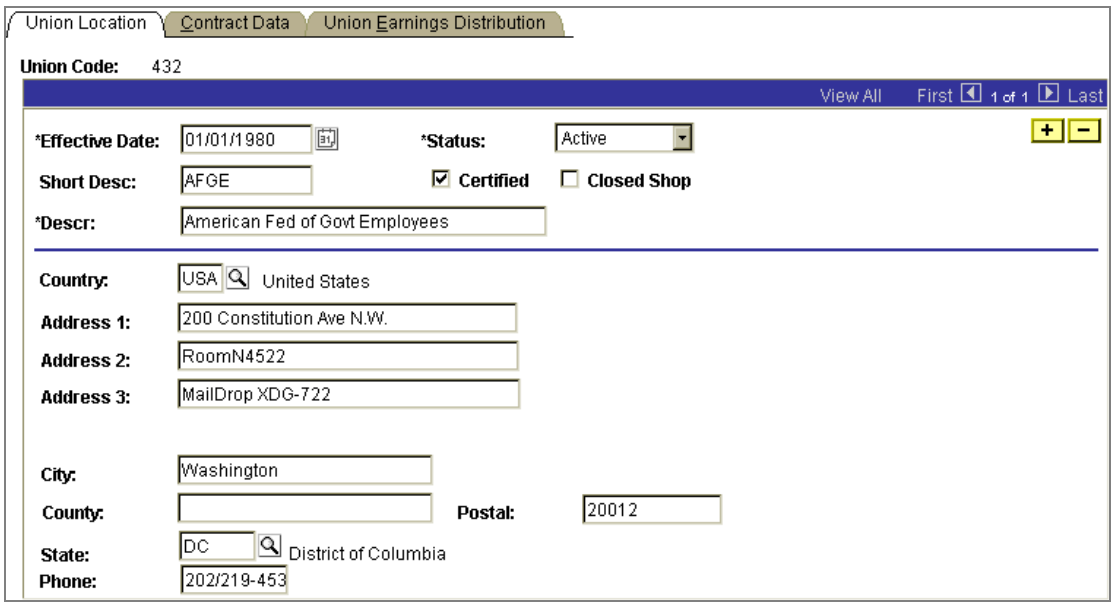
Pages Used to Set Up Union Data

Page Name	*Object Name*	*Navigation*	*Usage*
Union Table - Union Location	UNION_TABLE1	Administer Workforce, Administer Workforce (GBL), Setup, Union Table, Union Location Administer Workforce, Administer Workforce (FPS), Setup, Union Table, Union Location	Enter general details for a union.
Contract Data	UNION_TABLE2	Administer Workforce, Administer Workforce (GBL), Setup, Union Table, Contract Data Administer Workforce, Administer Workforce (FPS), Setup, Union Table, Contract Data	Enter information on union contract terms.
Union Earnings Distribution	UNION_TABLE3	Administer Workforce, Administer Workforce (GBL), Setup, Union Table, Union Earnings Distribution Administer Workforce, Administer Workforce (FPS), Setup, Union Table, Union Earnings Distribution	Enter additional contract terms, such as callback hours and allowable earnings codes.

Note. Also access these pages through the alternate navigation, Administer Workforce, Manage Labor Relations (GBL), Setup, Union Table.

Entering General Union Details

Access the Union Table - Union Location page.



Union Table - Union Location page

Certified Select if the union is certified. Certification means that a labor relations board in the country in question formally recognizes the union as the bargaining unit's exclusive representative. Certification typically occurs after the union wins a vote to form a union. A labor relations board's involvement in certifying the union ensures that all the appropriate laws and regulations have been followed in forming the union.

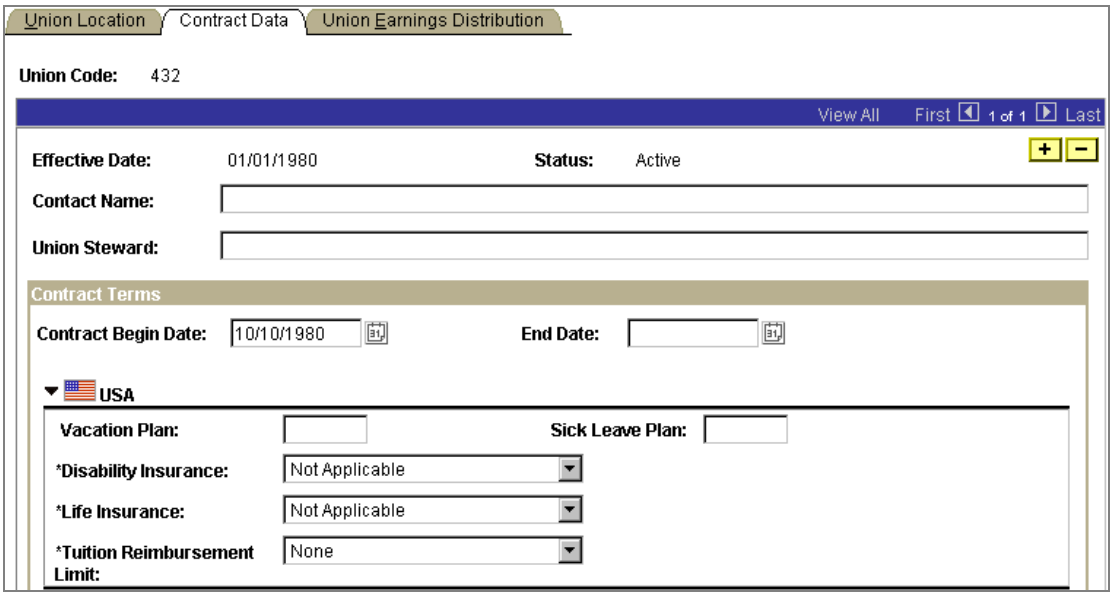
Closed Shop Select if the union is a closed shop. This usually means that individuals can't work for a company within the represented worker class unless they agree to pay the equivalent dues to the union.

See Also

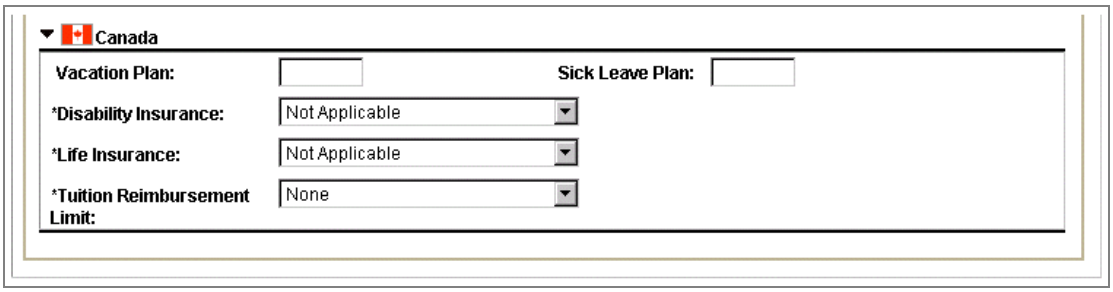
PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Your HRMS System," Administering Country Codes

Entering Information on Union Contract Terms

Access the Union Table - Contract Data page.



Union Table - Contract Data page (1 of 2)



Union Table – Contract Data page (2 of 2)

USA/CAN

Vacation Plan Enter the code for the type of vacation plan administered.

Sick Leave Plan Enter the code for the type of sick leave administered.

Contract Begin Date and **End Date** Enter the dates that the contract begins and ends.

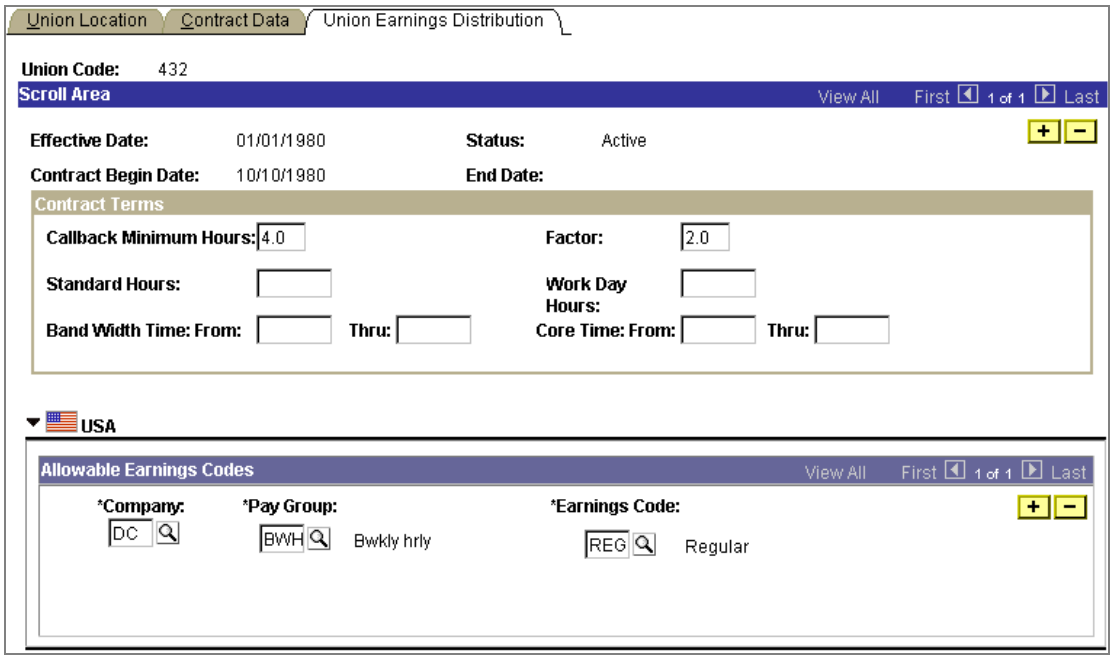
Disability Insurance Indicate whether the union provides disability insurance for its members.

Life Insurance Indicate whether the union provides life insurance.

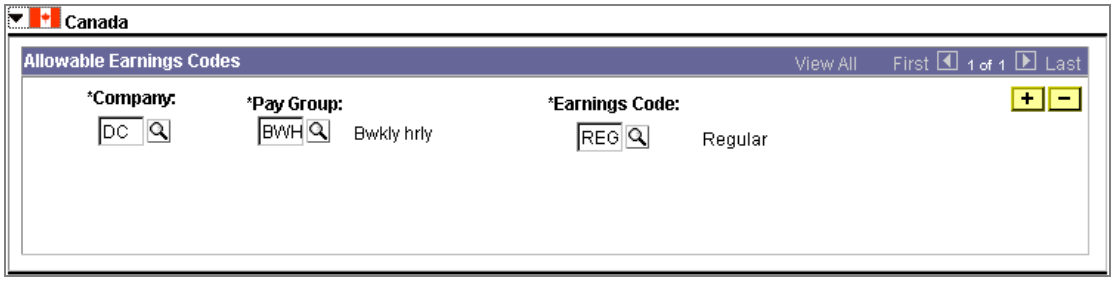
Tuition Reimbursement Limit Indicate whether the union provides tuition reimbursement and what limit.

Entering Additional Contract Terms

Access the Union Table - Union Earnings Distribution page.



Union Table - Union Earnings Distribution page (1 of 2)



Union Table – Union Earnings Distribution page (2 of 2)

Contract Terms

Factor Enter the rate at which union employees should be paid if they are called into a job. For example, if the employee should receive the regular rate, enter ***1.*** If the employee should receive 1.5 times the regular rate, then enter ***1.5.***

Tuition Reimbursement Limit Indicate the maximum amount of tuition the union pays each member, if any.

USA/CAN Allowable Earnings Codes

Earnings Code Enter the earnings code for this union. For example, at ***CCB,*** union employees who are paid ***semimonthly*** can receive ***overtime, regular,*** and ***sick pay.***

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working with Companies," Defining Establishments

"Hiring Your Workforce," Entering Employee Job Information

(CAN) (USA) Setting Up Bargaining Unit Tables

In the Bargaining Unit Tables component, record general bargaining unit details and contact information.

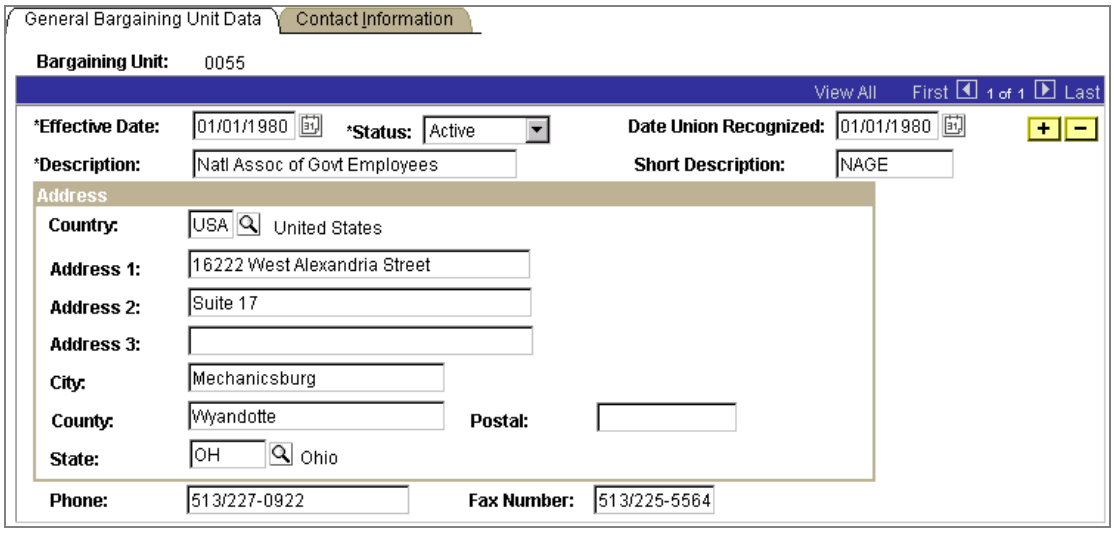
Pages Used to Set Up Bargaining Unit Tables

Page Name	*Object Name*	*Navigation*	*Usage*
General Bargaining Unit Data	GVT_BARG_UNIT1	Administer Workforce, Administer Workforce (GBL), Setup Lcl, USA/CAN Bargaining Unit, General Bargaining Unit Data	Enter bargaining unit details.
Contact Information	GVT_BARG_UNIT2	Administer Workforce, Administer Workforce (GBL), Setup Lcl, USA/CAN Bargaining Unit, Contact Information	Enter union contact information.

Note. Access these pages through the following alternate navigation paths: Administer Workforce, Manage Labor Relations (GBL), Setup Lcl, CAN/USA Bargaining Unit *and* Administer Workforce, Administer Workforce (USF), Setup, Bargaining Unit Table.

Enter Bargaining Unit Details

Access the CAN/USA Bargaining Unit - General Bargaining Unit Data page.



CAN/USA Bargaining Unit - General Bargaining Unit Data page

Date Union Recognized Enter the date the union was recognized by your agency.

Setting Up Works Councils

The works councils for your company are internal committees elected by the nonmanagement employees to represent their interests. If your organization does business in countries where workers can belong to works councils, every work location in your company may have a local works council. The company as a whole may have a central works council. The works council's duties may include:

- Watching the implementation of collective bargaining agreements.
- Promoting integration of minorities, young, older, and handicapped employees.
- Monitoring fair compensation and working hours.
- Providing codetermination concerning layoffs, short-time work, and other labor issues.

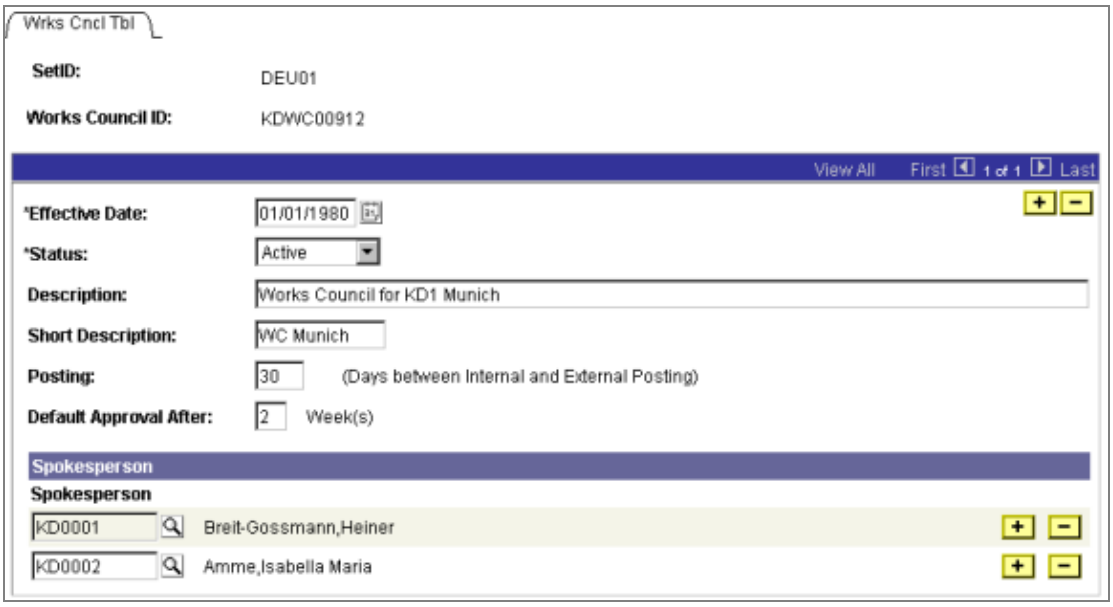
If your organization does business in countries where workers can belong to works councils, define the works councils that your employees can join.

Page Used to Set Up Works Councils

Page Name	*Object Name*	*Navigation*	*Usage*
Wrks Cncl Tbl (works council table)	WRKS_CNCL_TBL	Administer Workforce, Manage Labor Relations (GBL), Setup, Works Council Table, Wrks Cncl Tbl	Specify the works councils to which your employees may belong.

Specifying Works Councils

Access the Wrks Cncl Tbl page.



Wrks Cncl Tbl page

Works Council ID The ID you entered to access this page. This is the ID you'll define.

Posting Enter the number of days between internal and external posting.

Default Approval After Enter the number of weeks after which the default approval takes affect. Any hire approval requests that have not been approved or denied after this time are automatically set to ***KDA-Agree,*** which automatically updates the applicant status to ***080-Ready to Hire.***

Spokesperson Select the ID for the person to whom you want to route works council prehire approvals. This person will receive any works council hire approval requests for job requisitions that have a works council ID. Enter as many spokesperson IDs as needed.

Note. If you're setting up German works councils, link the works council to the Location Table.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working with Companies," Establishing Locations

(GER) Setting Up the German Works Council Business Process

In addition to the core functionality setup tables, if you're administering a German workforce, you'll use several German setup tables to define codes for labor relations matters that affect your company, such as tariff areas, spokesmen committees, and works councils. This is the first step in the German Works Council business process.

Rules defining employee labor relations for your German workforce are negotiated between the trade unions and the employers' associations. Additional rules are defined between the employees and their employers through two groups of elected representatives. The works councils represent nonmanagement employees. The spokesmen committee represents management employees. Although the works councils and spokesmen committees are groups of people elected to represent the interests of employees, they aren't union representation.

Use the codes and information that you set up in these tables to track information about decisions made by the works councils at your operating locations.

Tariff Areas

A tariff is a contract between the employees' unions and the employers' association, defining labor agreements on issues such as standard working hours, income, and vacation. This contract is valid for all of Germany for the business or industrial sector the company is working in (such as banking or metal). Tariffs are already in the system.

Additional labor agreement terms, such as salary plans or employee reviews, can also be applied based upon the tariff area. Region or location (such as Bavaria or Berlin) often define the tariff area.

Spokesperson Committee

The spokesmen committee (*sprecherausschusse*) represents the interest of the management personnel in your company before the ownership or executive management. The spokesmen committee mainly consults; however, it also helps determine individual employment contracts, hirings, and dismissals. The committee also helps monitor employment fairness, equity, and nondiscrimination in terms of nationality, race, religion, sex, and age.

See Also

Setting Up Works Councils

Understanding the German Works Council Business Process

To set up and run the German Works Council business process:

1. Set up codes and values on the following pages:
   - Employee Categorization.
   - GER Tariff Area.

- GER Spokesmen Committee.
- GER Works Council Decision Table.
- GER Works Council Decision Group.

2. Associate decision groups to action reasons on the Action Reason Table page.

3. Maintain job labor data.

   Use the Job Data - Job Labor page to describe, for each of your employees, a labor category and the type of role this category plays in the company.

4. Enter employee job actions.

   The next step in the process occurs when a personnel action is entered into Job Data for a German employee who is associated with the *DEU* regulatory region. If the action reason has a works council decision group associated with it, then the works council may have to review and approve the action. If the action needs to be reviewed by the works council, then workflow sends an email to the works council member and a worklist is created. Enter personnel actions using the Job Data pages.

5. Review and approve employee job actions.

   The processing for the works council review and approval is automated. The works council member reviews the worklist, uses the GER Works Council Decision pages to look at the information about the employee and the action, and enters a response (or decision). Once a decision is entered, the personnel administrator (human resources manager) is notified with an email and worklist.

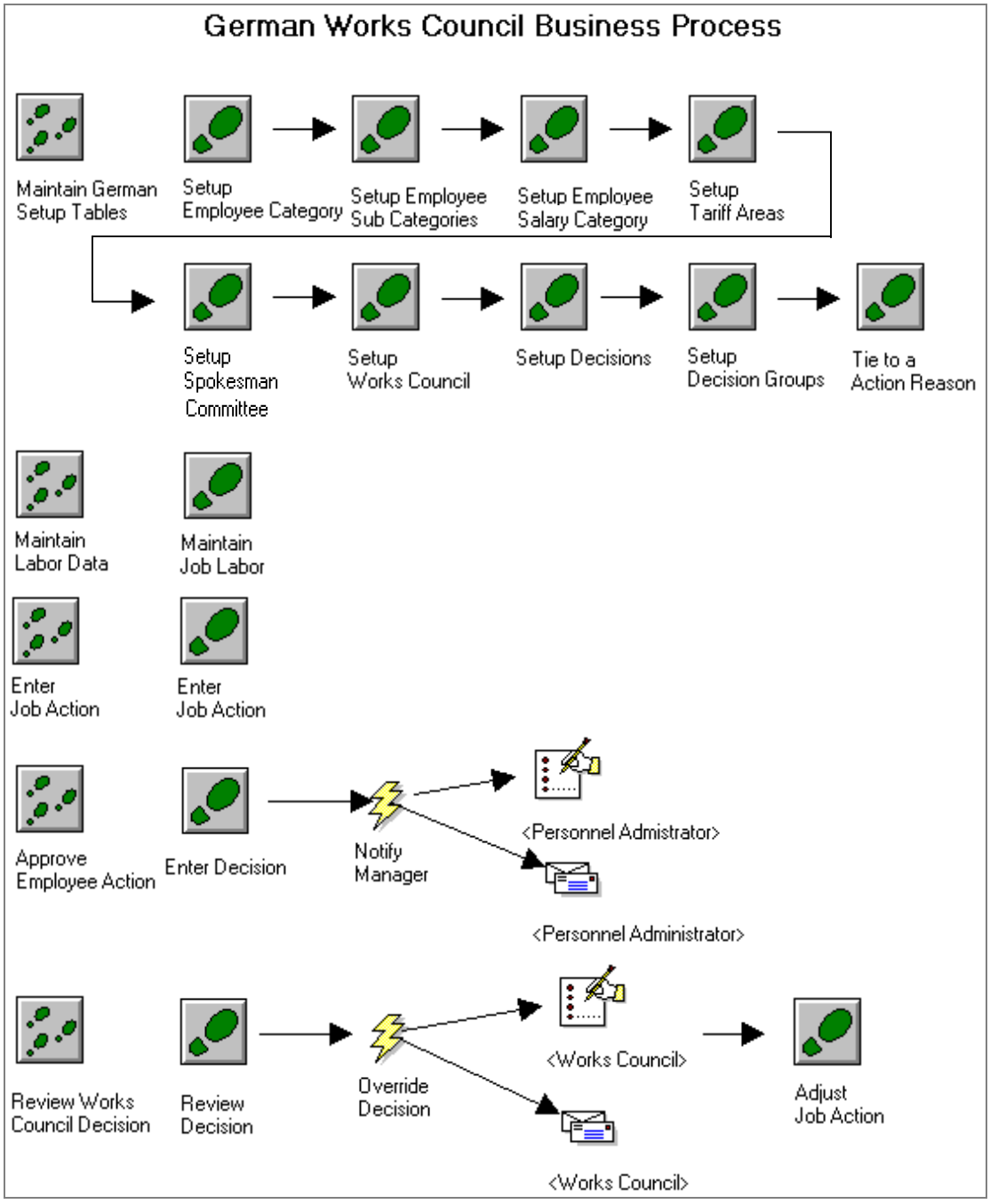
6. Review works council decisions.

   The personnel administrator uses the Decisions - Germany page to review the works council's decision and chooses to accept or override the works council's decision. If the personnel administrator overrides the works council decision, the works council is notified with an email and worklist.

7. Adjust job actions.

   If the works council decision rejects the pending personnel action, and the personnel administrator agrees with the rejection and the reasons given, then change or correct the proposed personnel action by returning to the Job Data pages in correction mode.

The following diagram summarizes the flow of this process.



The German Works Council business process

See Also

"Setting Up the Administer Workforce Business Process," Defining Labor Agreements, Labor Agreement Categories, and Employee Classes and Defining Reasons for Personnel Actions

"Setting Up Country-Specific Tables," (GER) Setting Up German Workforce Tables

"Hiring Your Workforce," Entering Employee Job Information

"Updating Workforce Information," Personnel Actions and Employee Status

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Using PeopleSoft Workflow"

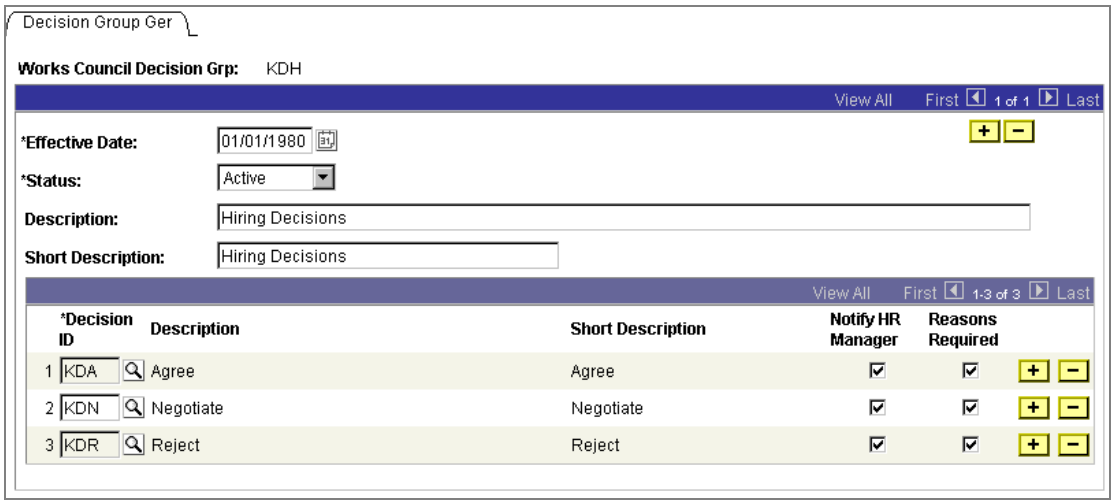
Pages Used to Define German Labor Relations Codes

Page Name	*Object Name*	*Navigation*	*Usage*
Tariff Area Ger (German tariff area)	TARIFF_AREA_GER	Administer Workforce, Manage Labor Relations (GBL), Setup Lcl, GER - Tariff Area, Tariff Area Ger	Enter tariff areas for later use on the Job Labor - Germany page.
Spokesmen Comm (spokesmen committee)	SPK_COMM_GER	Administer Workforce, Manage Labor Relations (GBL), Setup Lcl, GER - Spokesmen Committee, Spk Comm Ger	Describe the spokesmen committee for your work locations.
Decision Table	DECN_TBL_GER	Administer Workforce, Manage Labor Relations (GBL), Setup Lcl, GER - Works Council Decision, Decision Table	Enter works council decision types. You must have previously defined Works Council Decision codes.
Decision Group Ger (German decision group)	DECISIONGRP_GER	Administer Workforce, Manage Labor Relations (GBL), Setup Lcl, GER - Works Council Decn Grp, Decision Group Ger	Enter works council decision groups. This table ties works council decision types to a decision group (such as *Pay Action*). You must first have entered works council decisions into the system. Multiple works council decision groups can use the works council decisions.

Note. In PeopleSoft Human Resources, the tariff areas for the metal tariff are included as system data.

Defining Works Council Decision Groups

Access the Decision Group Ger page.



Decision Group Ger page

Decision ID When you move through the field, the **Description** and **Short Description** appear.

Notify HR Manager Select this check box if the human resources manager needs to be notified, or if reasons are required to explain the decision.

When this check box is selected, a workflow process notifies the personnel administrator role (human resources manager) when a works council decision is entered on the Works Council Decisions page.

Reasons Required Select this check box if reasons are required to explain the decision.

When this check box is selected, you must also complete the **Comments** field.

Note. Link works council decision groups with action reasons using the Action Reason Data page. Then when a personnel action is entered into Job Data for a German Employee having the *DEU* regulatory region, the works council can give only the predetermined answers (decisions) defined for the decision group on this page.

See Also

"Setting Up Country-Specific Tables," (GER) Setting Up German Workforce Tables

"Updating Workforce Information," Personnel Actions and Employee Status

Setting Up Works Councils

(GER) Entering German Works Council Decisions

Works council members should use the GER Works Council Decision component to record works council decisions about personnel actions affecting employees. Before using these pages, however, you must:

- Associate action reasons with works council decision groups on the Action Reason Data page.
- Initiate a personnel action on the Job Data component for a German employee who is associated with the *DEU* regulatory region. The action reason must be associated with a works council decision group and the decision group that requires works council notification.

Processing for works council review and approval is automated. If the works council needs to review the personnel action, then workflow sends an email to the works council member and a worklist is created. The works council member can use the worklist to go directly to the GER Works Council Decision page on the employee and the action and enter a response (or decision).

Pages Used to Enter German Works Council Decisions

Page Name	*Object Name*	*Navigation*	*Usage*
Works Council Information	JOB_LABOR_WRKS_GER	Administer Workforce, Manage Labor Relations (GBL), Inqr Lcl, GER - Works Council Decision, Works Council Information	Review an employee's personnel action and related information. The information on this page is display only.
Works Council Decision	JOB_LABOR_WRK2_GER	Administer Workforce, Manage Labor Relations (GBL), Inqr Lcl, GER - Works Council Decision, Works Council Decision	Enter the works council's decision, or response, to the pending personnel action.

Entering the Works Council's Decision on a Personnel Action

Access the Works Council Decision - Works Council Decision page.



Works Council Decision - Works Council Decision page

All of the fields in the top three group boxes on this page display information from job data associated with the employee and the pending personnel action.

Decision Group — The decision group to which the **Works Council Decision** belongs. The decision group indicates the type of personnel action, such as ***Hiring Decision*** or ***Pay Action.***

User ID — The user ID of the person who entered the works council decision. The system also displays the user's description.

Decision Date/Time — The date and time that the works council decision was entered.

Works Council Decision — Enter a works council decision for this personnel action.

Notify HR Manager and **Reasons Required** — These check boxes are controlled by the Works Council Decision Group Table page. If either of the check boxes is selected on that page, then the corresponding check box on this page appears selected. If Reasons Required is selected, also enter the reason in the **Comments** field. If Notify HR Manager is selected, workflow sends the personnel administrator an email and a worklist.

Override Works Council — Select if the human resources manager decides to reject the works council decision.

Note. The human resources manager can then use the Decision - Germany page to review the works council decision and can choose to override the decision, if necessary. Entering a works council decision that requires the job action to be removed won't automatically remove the job action. This requires the concurrence of the personnel administrator and must be done manually by re-entering job data in correction mode.

See Also

"Hiring Your Workforce," Entering Employee Job Information

Managing Works Council Decisions for Applicants

Often it is necessary for a works council to make a decision about an applicant before they are hired. Here is an overview of how this process flows.

1. You change the Disposition status to 073-Request Wrks Cncl Approval in the Applicant Activity component.

   Upon save, a message is issued notifying you that the works council will be notified about the hire request. A worklist is sent to the works council spokesperson.

2. The works council spokesperson decides on the Works Council Decision page (Develop Workforce, Recruit Workforce, Inqr Lcl, GER Works Council Decision).

   Upon save, a worklist is sent to the human resources manager (if this option is selected on the Decision Group page).

   The Disposition status and Reason on the Applicant Activity component are updated with the default Status and Reason entered for this decision on the Works Council Recruitment Status page.

3. Any approval requests that have not been approved or denied after the number of weeks defined in the Default Approval After field on the Works Council Table page are automatically set to *Agreed.*

   This automatically updates the Applicant Status in the Applicant Activity component to *080-Ready to Hire* and the Reason to *010-Works Council Approval.*

4. The human resources manager is sent a worklist notification (if this option is selected on the Decision Group page).

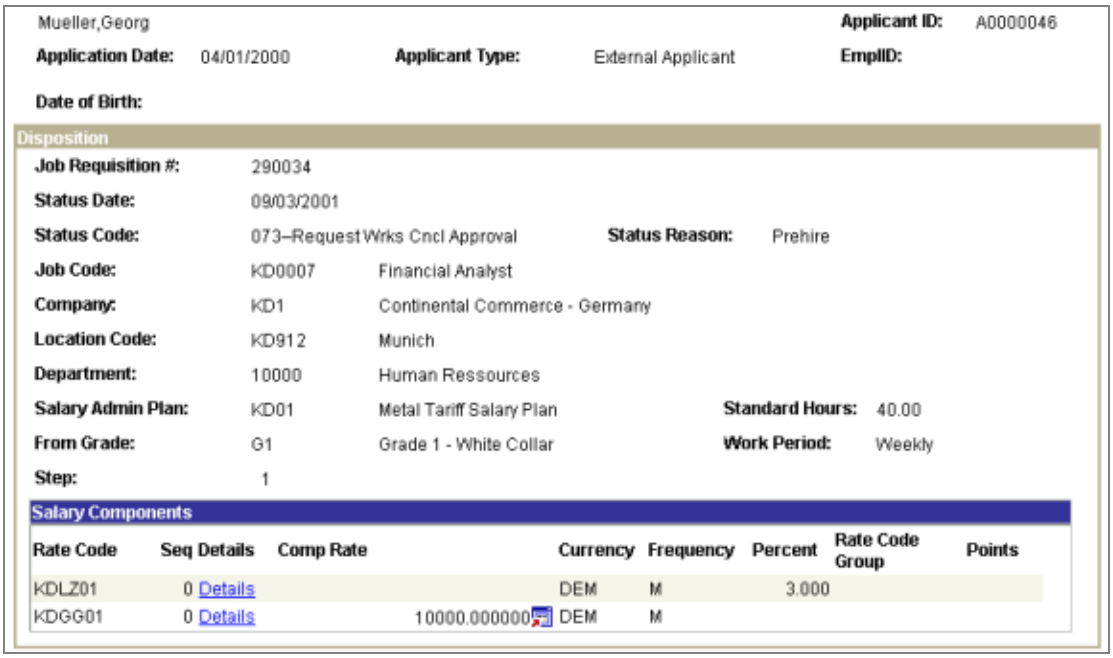
5. If you try to manually change the status in the Applicant Activity component from 073-Request Works Council Approval, a warning appears informing you that the applicant is awaiting works council hire approval and that a manual update won't allow the automatic update of the applicant's status with the works council decision. You are also given the option of updating the status. If you choose to update the status, the status is updated; otherwise, it is not.

Pages Used for Works Council Process for Applicants

Page Name	*Object Name*	*Navigation*	*Usage*
Works Council Information	APP_JOB_WRKS_GER	Develop Workforce, Recruit Workforce (GBL), Inqr Lcl, GER Works Council Decision, Works Council Information Develop Workforce, Recruit Workforce (GBL), Use Lcl, GER Works Council Decision	Review an applicant's personnel action and related information.
Works Council Decision	APP_JOB_WRK2_GER	Develop Workforce, Recruit Workforce (GBL), Inqr Lcl, GER Works Council Decision, Works Council Decision	Enter the works council's decision, or response, with respect to the pending applicant action.
GER Wrks Cncl Recruit Status (works council recruit status)	RECRUIT_STATUS_GER	Develop Workforce, Recruit Workforce (GBL), Setup Lcl, GER Wrks Cncl Recruit Status	Enter information to update an applicant's status in the Applicant Activity component when a works council makes a decision pertaining to the applicant.

Reviewing a German Applicant's Personnel Action

Access the GER Works Council Information page.



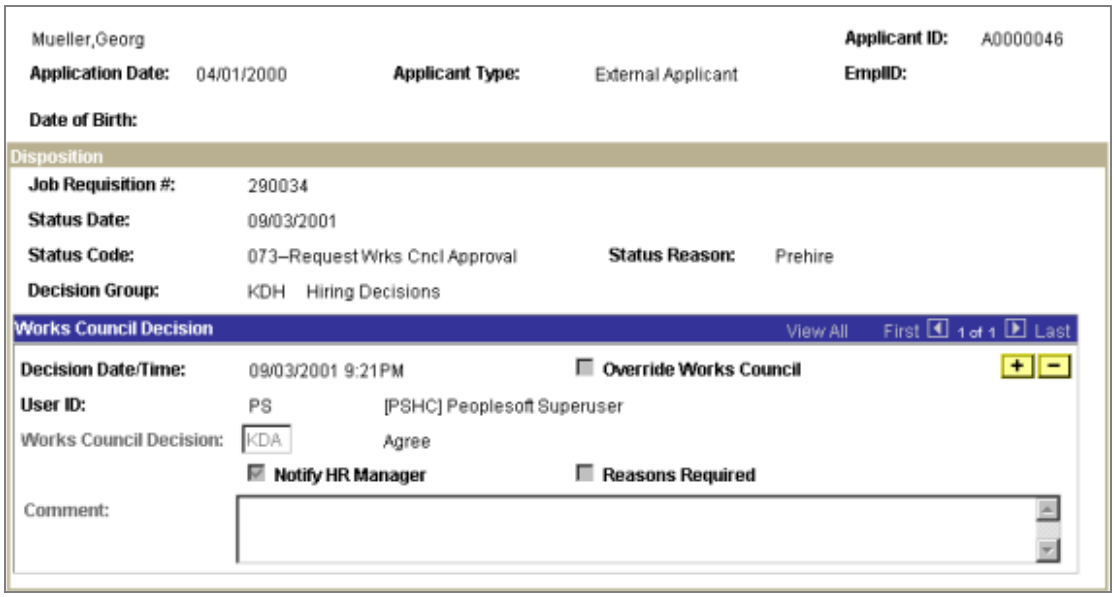
Works Council Information page

This page is display only and functions identically to the Works Council Information page found elsewhere in the system (JOB_LABOR_WRKS_GER).

Once you have reviewed the information, move to the GER Works Council Decision - Works Council Decision page.

Entering the Works Council's Decision on an Applicant Personnel Action

Access the Works Council Decision page.



Works Council Decision page

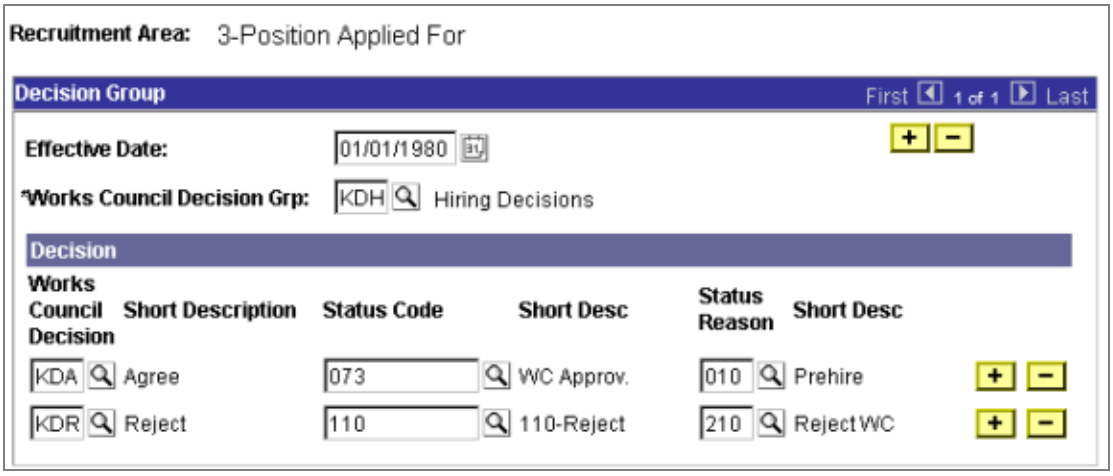
All of the fields in the top three group boxes on this page display information from applicant data associated with the applicant and the pending personnel action.

The remaining fields on the page function identically to the Works Council Decision page found elsewhere in the system (JOB_LABOR_WRK2_GER).

If you select the Notify HR Manager check box, the human resources manager is notified by email and an entry in his or her worklist. The manager reviews the works council decision from the Works Council Decision component (Develop Workforce, Recruit Workforce (GBL), Use Lcl, GER Works Council Decision).

Updating an Applicant's Status

Access the German Works Council Recruit Status page.



GER Wrks Council Recruit Status page

PeopleSoft delivers a set of predefined data for this page, but you may change the data so that other status conditions are set in the Applicant Activity component with each works council decision.

(FRA) Note. In France, companies with more than eleven employees must elect personnel representatives to represent all of the employees before management. Companies with more than 50 employees must elect a Work Council to represent the employees in negotiations with management.

See Also

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements, "(FRA) Meeting Regulatory Requirements for France," Meeting French Professional Elections Reporting Requirements

Tracking Disciplinary Actions

If you take disciplinary action against one of your employees, it is important to keep an accurate record of the nature of the violation and the steps you take to respond to the incident. This helps protect your organization against legal liability.

Here's how you track disciplinary actions:

1. Identify the various types of violations employees commit that may require managers to take disciplinary actions using the Disciplinary Type Table page.

2. Identity the steps managers can take during the disciplinary action process using the Disciplinary Step Table page.

3. Identify the various types of actions managers can take to resolve disciplinary violations using the Resolution Type Table page.

4. Enter details of particular disciplinary incidents and the steps taken to resolve the incident using the Disciplinary Action component.

5. Use the Disciplinary Action page to describe the incident that required a disciplinary action.

6. Use the Action Taken page to document the disciplinary steps imposed on the employee.

7. Use the Disciplinary Resolution page to document how the incident was finally resolved.

8. Review the disciplinary actions that have been taken on your employees with the Employee Disciplinary Action report and the Discipline Action Summary report.

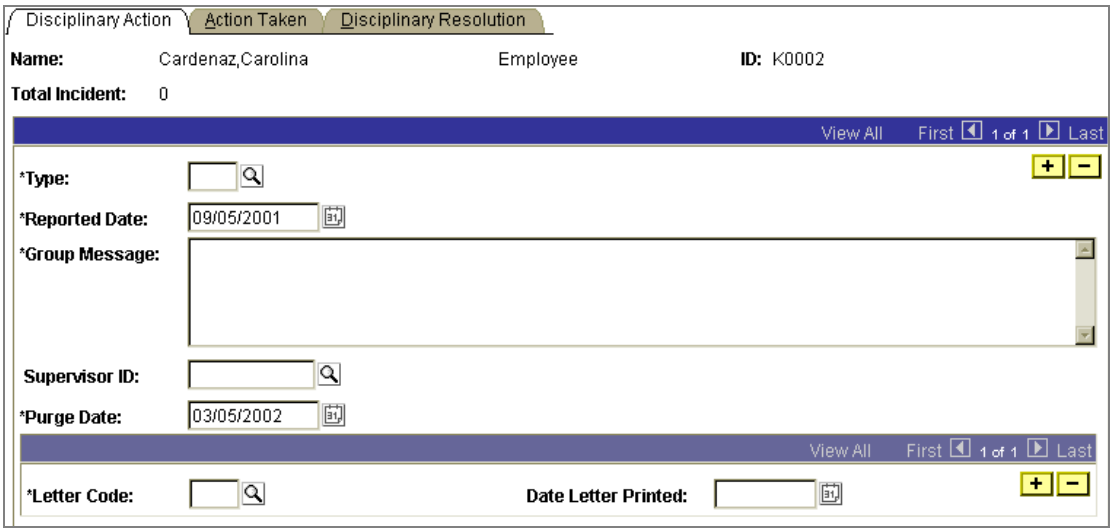
Pages Used to Track Disciplinary Actions

Page Name	*Object Name*	*Navigation*	*Usage*
Disciplinary Type Table	DISCIP_TYPE_TABLE	Administer Workforce, Administer Workforce (USF), Setup, Disciplinary Offenses Table, Disciplinary Offenses Table Administer Workforce, Manage Labor Relations (GBL), Setup, Disciplinary Type Table, Disciplinary Type Table	Identify the various types of violations that may require managers to impose disciplinary actions on employees.
Disciplinary Step Table	DISCIP_STEP_TABLE	Administer Workforce, Manage Labor Relations (GBL), Setup, Disciplinary Step Table, Disciplinary Step Table	Define the steps managers can take during the disciplinary action process.
Disciplinary Action	DISCIPLINARY_ACTN	Administer Workforce, Manage Labor Relations (GBL), Use, Disciplinary Action, Disciplinary Action	Describe an incident that led to a disciplinary action against an employee.
Action Taken	ACTION_TAKEN	Administer Workforce, Manage Labor Relations (GBL), Use, Disciplinary Action, Action Taken	Document details of disciplinary actions taken against an employee.

Page Name	Object Name	Navigation	Usage
Disciplinary Resolution	DISCIP_ACTN_RESLTN	Administer Workforce, Manage Labor Relations (GBL), Use, Disciplinary Action, Disciplinary Resolution	Record the final resolution of an incident that required disciplinary action.

Describing Disciplinary Incidents

Access the Disciplinary Action page.



Disciplinary Action page

Type Select a disciplinary action type.

Reported Date Defaults to the system date, usually today's date. Change the date unless the disciplinary action was reported today.

Incident Description Enter a free-form description of the incident that led to the disciplinary action. Your description can be longer than the three lines shown.

Supervisor ID The supervisor ID listed for this employee on the Job Data page. You can change this.

Purge Date The system automatically inserts a purge date of six months from the Reported Date.

Letter Code Select the type of letter you want to issue the employee.

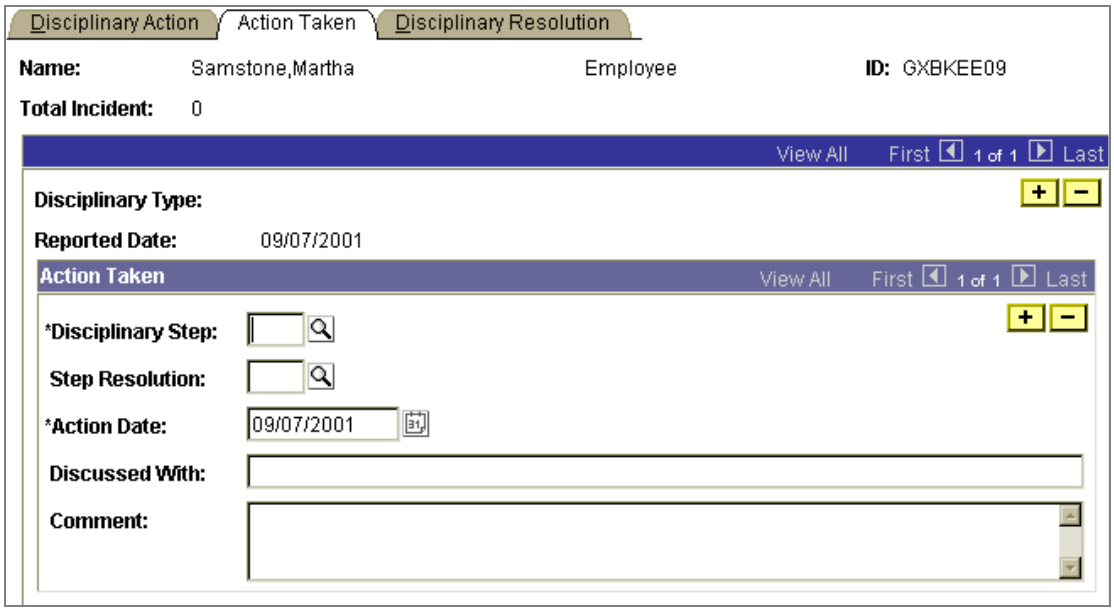
Date Letter Printed The system generates this date when you run the standard letter process.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Generating Form Letters"

Documenting Disciplinary Action Details

Access the Action Taken page.



Action Taken page

Action Taken

Disciplinary Step Select a disciplinary step for the action taken to resolve the problem.

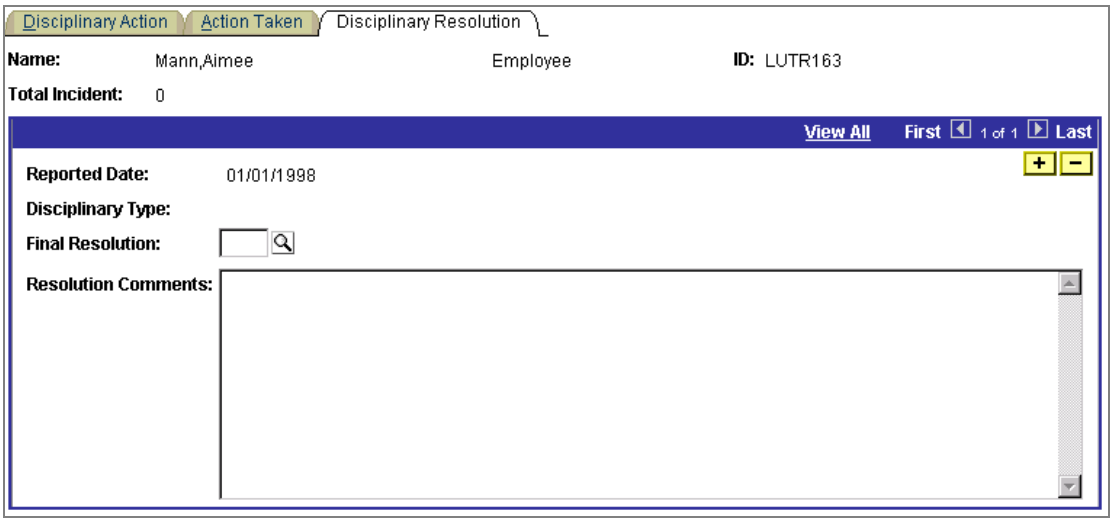
Step Resolution Select the resolution type that occurred for this step.

Action Date Enter the date when the disciplinary step took place. The default value is today's date, which you will change unless the action taken in this step begins today.

Discussed With Enter the name of the person with whom you discussed the step.

Recording Incident Resolutions

Access the Disciplinary Resolution page.



Disciplinary Resolution page

Final Resolution Select the resolution type that describes how the incident was finally resolved.

Resolution Comments Enter any comments you have about the final resolution. You can use more space than the three lines shown.

Reviewing Disciplinary Action Reports

Use the Employee Disciplinary Action report (OHS005) to review the disciplinary actions imposed on an employee. This Crystal report lists the detailed disciplinary action information for a specific employee within a specified date range and itemizes the action details within an incident.

Use the Discipline Action Summary report (OHS002) to review a summary description of disciplinary actions taken against employees within a specified date range. This Crystal report itemizes actions by date, by incident, and by employee.

Tracking Grievances

To help protect you from legal liability, it is important to keep an accurate record of workplace grievances and any actions taken when grievances are filed against your company. Use the Grievances pages to enter formal grievances filed by employees, applicants, unions, or other sources, and to track the steps taken to resolve the grievance.

Here's how you track grievances:

1. Identify the various types of workplace grievances your organization may need to handle using the Grievance Type Table page.

2. Identify the standard course of steps managers can take during the grievance process using the Grievance Step Table page.

3. Enter details of particular grievances and the steps taken to resolve them using the Grievances component.

4. Use the Grievance page to describe the nature of the grievance.

5. Use the Grievance Steps page to record the steps taken to resolve the grievance.

6. Use the Grievance Resltn (grievance resolution) page to document how the grievance was finally resolved.

7. Review the grievances that have been filed against your organization using the Grievance Detail report (OHS004) and the Grievance Summary report (OHS006).

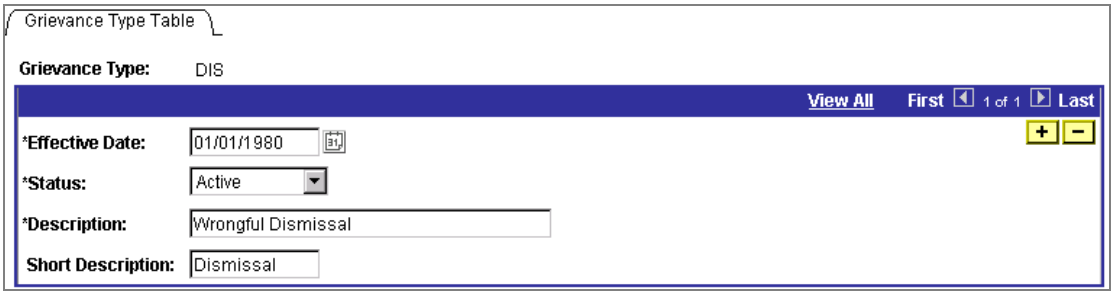
Pages Used to Track Grievances

Page Name	*Object Name*	*Navigation*	*Usage*
Grievance Type Table	GRIEV_TYPE_TABLE	Administer Workforce, Manage Labor Relations (GBL), Setup, Grievance Type Table, Grievance Type Table	Classify the different kinds of grievances that employees, applicants, or unions might file.
Grievance Step Table	GRIEV_STEP_TABLE	Administer Workforce, Manage Labor Relations (GBL), Setup, Grievance Step Table, Grievance Step Table	Delineate the standard course of steps managers can take to resolve grievances.
Grievance	GRIEVANCES1	Administer Workforce, Manage Labor Relations (GBL), Use, Grievances, Grievance	Add a new grievance into the system. You must have previously entered employee records, business units, and department information.
Grievance Steps	GRIEVANCES2	Administer Workforce, Manage Labor Relations (GBL), Use, Grievances, Grievance Steps	Record actions taken in response to employee grievances.
Grievance Resolution	GRIEVANCE_RESLTN	Administer Workforce, Manage Labor Relations (GBL), Use, Grievances, Grievance Resolution	Document the final resolution of an employee grievance.

Note. Also access these pages through the alternate navigation, Administer Workforce, Manage Labor Relations (USF), Use, Grievances.

Classifying Grievances

Access the Grievance Type Table page.



Grievance Type Table page

Effective Date Defaults to the system date, usually today's date. Change if you plan to use the grievance type for grievances that have an earlier effective date. We recommend that you set the effective date to a date that accounts for employee and job history, such as ***January 1, 1980.***

Assigning Grievance IDs

When you open the Grievances component, the first thing you'll see is a box asking you to enter a grievance ID. Use the grievance ID to track a grievance through the entire resolution process. There are two ways to assign grievance IDs:

- Automatically: If you use automatic ID assignment, the system adds IDs sequentially as you add new grievances.

  If you let the system assign the number automatically, it first appears as ***0000000000.*** The actual number assigned to the grievance appears after you save the information you enter in the Grievances pages.

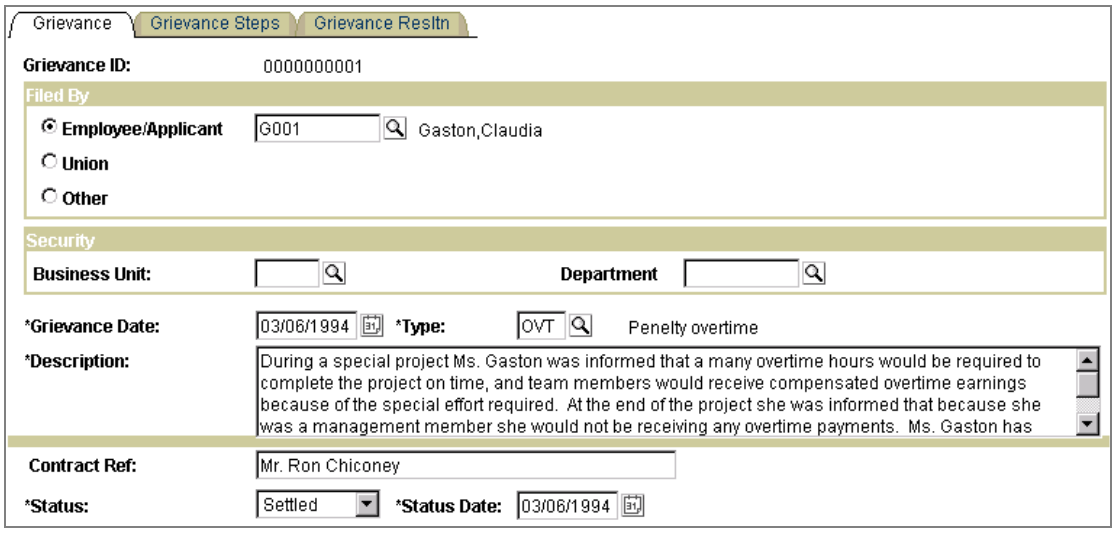
- Manually: Enter grievance IDs yourself, using whatever system you choose for your organization.

  If you choose manual entry, you don't need to assign IDs sequentially.

Note. To avoid maintaining two different sets of grievance IDs, we recommend that you choose only one way of assigning them. *Either* always assign IDs manually *or* always let the system assign them—not both.

Entering New Grievances

Access the Grievance page.



Grievance page

Filed By

If you are adding a grievance filed by an employee/applicant, click this button and enter the employee or applicant ID number in the adjacent field.

If you are entering a grievance filed by a union on behalf of union members, click the **Union** button and enter a union code in the adjacent field.

If you are entering a grievance that doesn't fall into either of the previous categories, select **Other.** In the adjacent field, enter free-form text up to 40 characters to describe who filed the grievance.

Security

Business Unit and **Department**

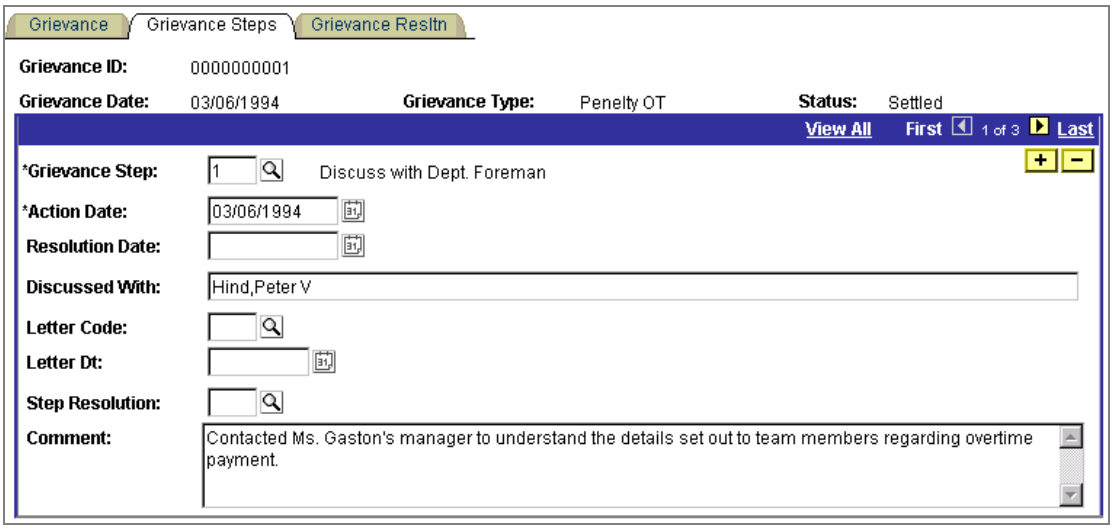
If you enter a business unit and department here, then only those users with security access to that department can access the grievance record when you save the information for this grievance. For example, if you select Department ***10200*** for Grievance ID ***0000000001,*** then when you save the page only users with security access to Department ***10200*** can access this record.

Note. If you don't enter a value in the Department field, then you won't set department level security for this record. The system defaults to no department security for grievance records.

Grievance Date	Defaults to the system date, usually today's date, which you can change unless the grievance was filed today.
Type	(Required) Select a grievance type.
Description	You can enter a grievance description longer than the three lines shown.
Contract Ref (contract reference)	Enter the contract reference for this grievance, if applicable.
Status and **Status Date**	When you indicate the status of the grievance—***Settled, Pending,*** or ***Appealed***—the system defaults the **Status Date** field to the system date, usually today's date, which you can override if the status date is different.

Tracking Steps in the Grievance Process

Access the Grievance Steps page.



Grievance Steps page

Note. Grievances are sorted in descending order—you'll see the most recent one first.

Grievance Step	Select the grievance step being taken in the grievance resolution process.
Action Date	Defaults to today's date. Change the date unless this step begins today.
Resolution Date	When the step is resolved, update this page by entering a resolution date, if applicable.
Discussed With	Enter the name of the person with whom you discussed the step.

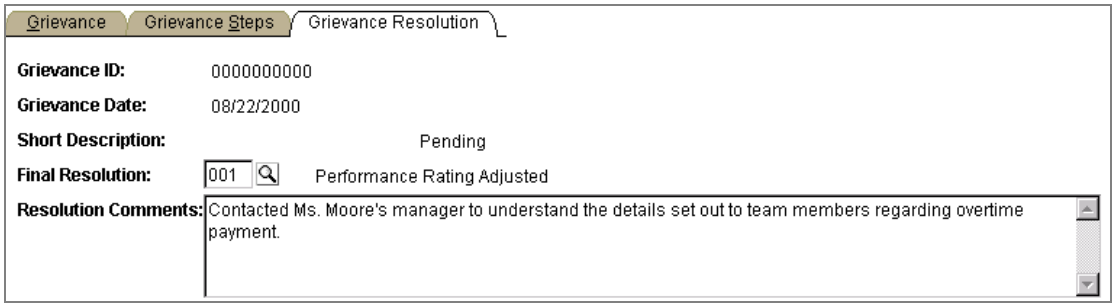
Letter Code	If you want to send a standard letter about the grievance, select the appropriate letter code.
Letter Date	Enter the date when the letter was sent.
Step Resolution	Select the action you took to resolve this step.
Comment	You can enter comments longer than the three lines shown.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Generating Form Letters"

Recording How Grievances Were Resolved

Access the Grievance Resolution page.



Grievance Resolution page

Final Resolution	Select the resolution type that describes how the incident was finally resolved.
Resolution Comments	Enter any comments you have about the final resolution.

Reviewing Grievances

Use the Grievance Detail report (OHS004) to review the detailed information for a formally filed grievance against the company.

Use the Grievance Summary report (OHS006) to review a summary description of the grievances and their associated steps filed against the company within a specified date range

(USF) Setting Up Labor Relations Data for U.S. Federal Government Employers

Use the Union Table to define codes and record data for unions to which agency employees belong. You or others in your agency might need information on union employees for collective bargaining agreement negotiations, grievance tracking, or pay step increases.

In this section, we discuss how to:

- Set up general union details.
- Enter bargaining unit address information.
- Enter bargaining unit contact details.
- Enter bargaining unit partnership and steward data.
- Enter additional bargaining unit contact information.
- Enter allowable earnings codes for bargaining unit members.

Pages Used to Set Up Labor Relations Data

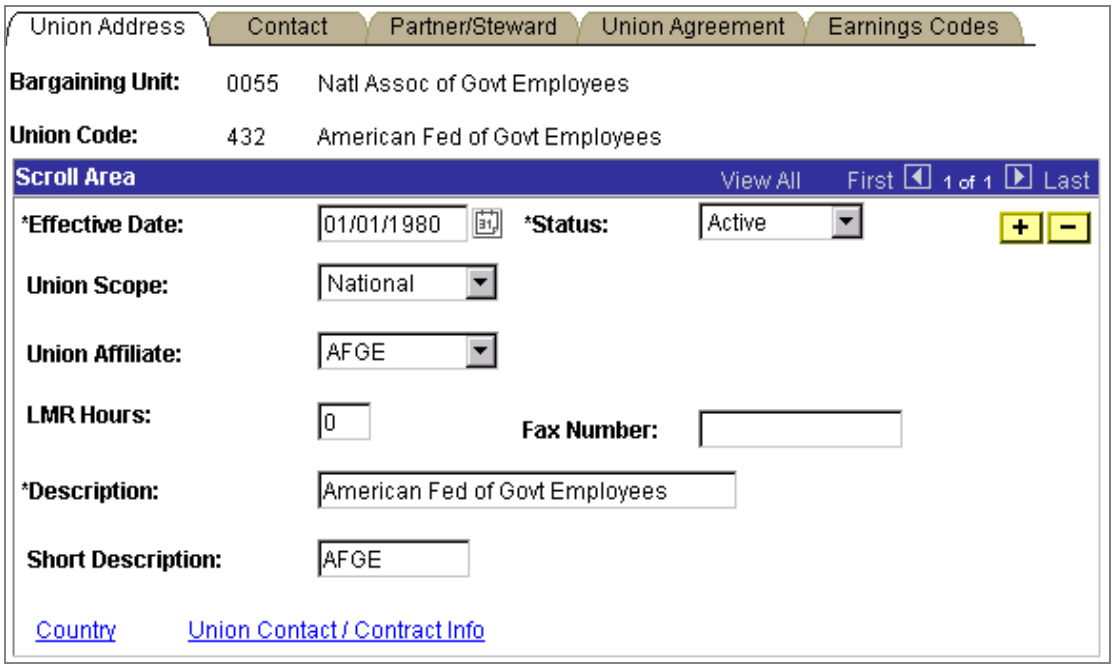
Page Name	*Object Name*	*Navigation*	*Usage*
Union Address	GVT_BU_UNION_TBL1	Administer Workforce, Manage Labor Relations (USF), Setup, Union Table, Union Address	Enter general details and address information for a union.
Union Address Information	GVT_BU_UNION_SEC1	Administer Workforce, Manage Labor Relations (USF), Setup, Union Table, Country	Enter the address information for this bargaining unit.
Contact and Contract Info	GVT_BU_UNION_SEC2	Administer Workforce, Manage Labor Relations (USF), Setup, Union Table, Union Contact/ Contract Info	Enter contact and contract details for this bargaining unit.
Contact	GVT_BU_UNION_TBL2	Administer Workforce, Manage Labor Relations (USF), Setup, Union Table, Contact Info	Enter additional union contact information.
Partner/Steward	GVT_BU_UNION_TBL3	Administer Workforce, Manage Labor Relations (USF), Setup, Union Table, Partnership Data/Steward Info	Enter partnership and steward data for this bargaining unit.

Page Name	Object Name	Navigation	Usage
Union Agreement	GVT_BU_UNION_TBL4	Administer Workforce, Manage Labor Relations (USF), Setup, Union Table, Union Agreement	Enter additional contract terms for this bargaining unit.
Earnings Codes	GVT_BU_UNION_TBL5	Administer Workforce, Manage Labor Relations (USF), Setup, Union Table, Allowable Earnings Codes	Enter allowable earnings codes data for bargaining unit members.

Note. Also access these pages through the alternate navigation, Administer Workforce, Administer Workforce (USF), Setup, Union Table.

Setting Up General Union Details

Access the Union Table - Union Address page.



Union Table - Union Address page

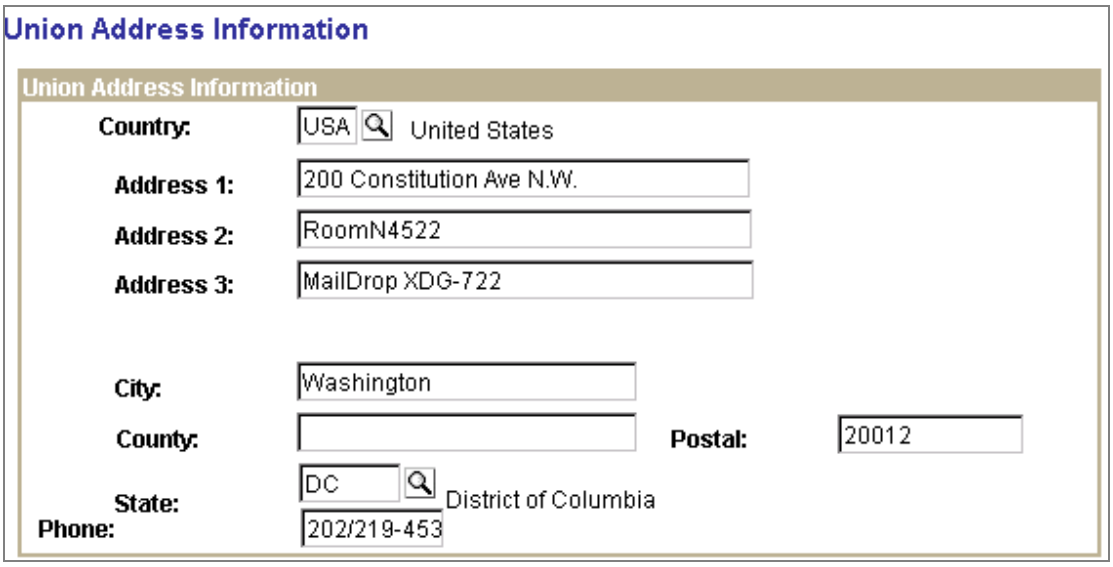
Union Scope Enter the union scope (local, national, worldwide).

Union Affiliate Enter the union affiliate type.

LMR Hours (labor management relations hours)	Enter the labor management relations training hours required for union members or other personnel, if you want to track this information.
Country	To enter the bargaining unit's address information, click this link. The Union Address Information page appears.
Union Contact/Contract Info	To enter the bargaining unit's contact and contract information, click this link. The Contact and Contract Info page appears.

Entering Bargaining Unit Address Information

Access the Union Table - Union Address: Union Address Information page.

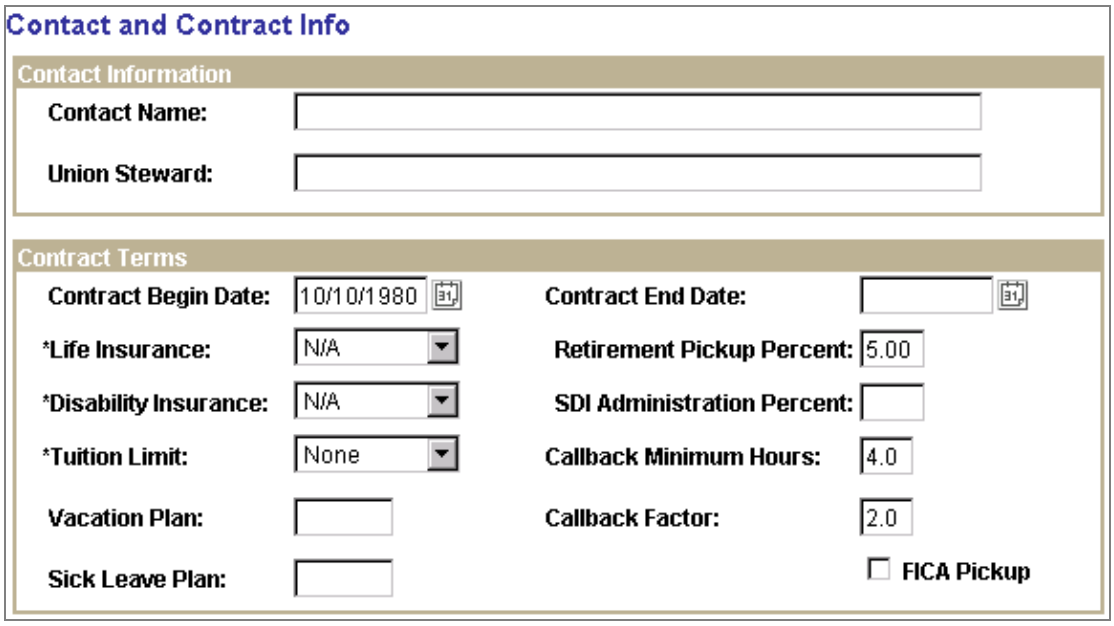


Union Table - Union Address: Union Address Information page

Country	The fields on this address group box dynamically reformat based on the country you select in the Country field.

Entering Bargaining Unit Contact Details

Access the Union Table - Union Address: Contact and Contract Info page



Union Table - Union Address: Contact and Contract Info page

Contract Terms

Disability Insurance — Specify the amount the disability insurance offered bargaining unit members.

Tuition Limit — Indicate the maximum amount of tuition provided each bargaining unit member, if any.

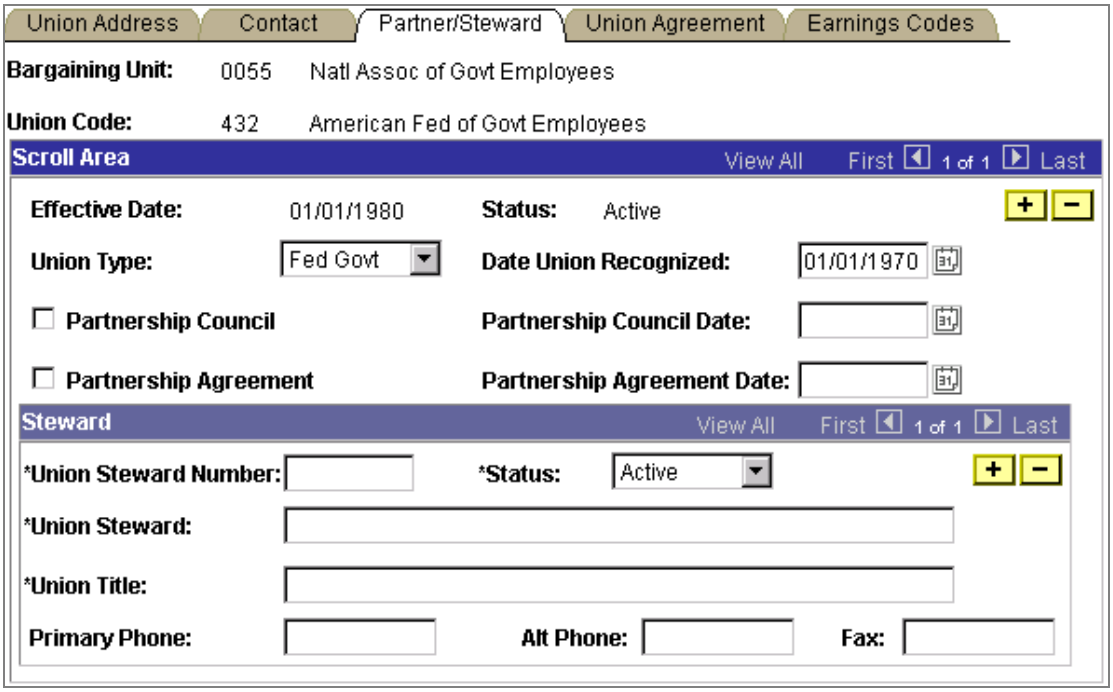
Retirement Pickup Percent — Enter the retirement pickup percent for bargaining unit members' retirement plan under the contract.

SDI Administration Percent (state disability insurance administration percent) — Enter the percent amount paid to the state disability insurance.

Callback Factor — Enter the rate at which bargaining unit members should be paid if they are called to a job. For example, if the employee should be paid at the regular rate, enter ***1*** as the factor. Or if the employee should be paid time and a half, enter ***1.5.***

Entering Bargaining Unit Partnership and Steward Data

Access the Union Table - Partner/Steward page.



Union Table - Partner/Steward page

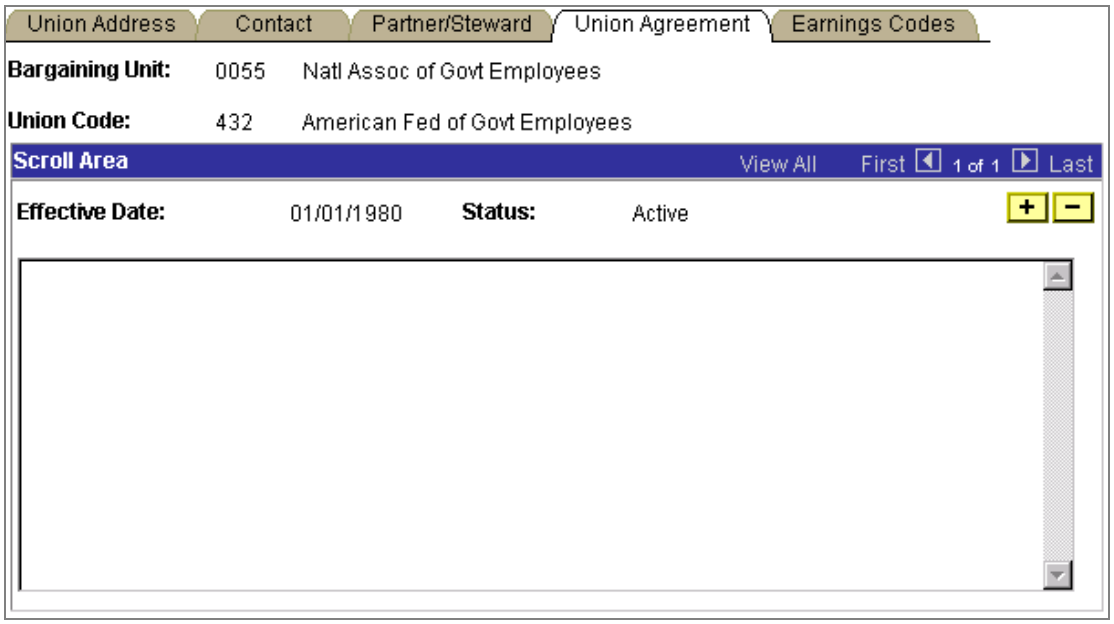
Scroll Area

Union Type Indicate whether this bargaining unit is part of a private, public, or federal government union.

Date Union Recognized Enter the date the union was recognized by your agency.

Entering Additional Bargaining Unit Contact Information

Access the Union Table - Union Agreement page.

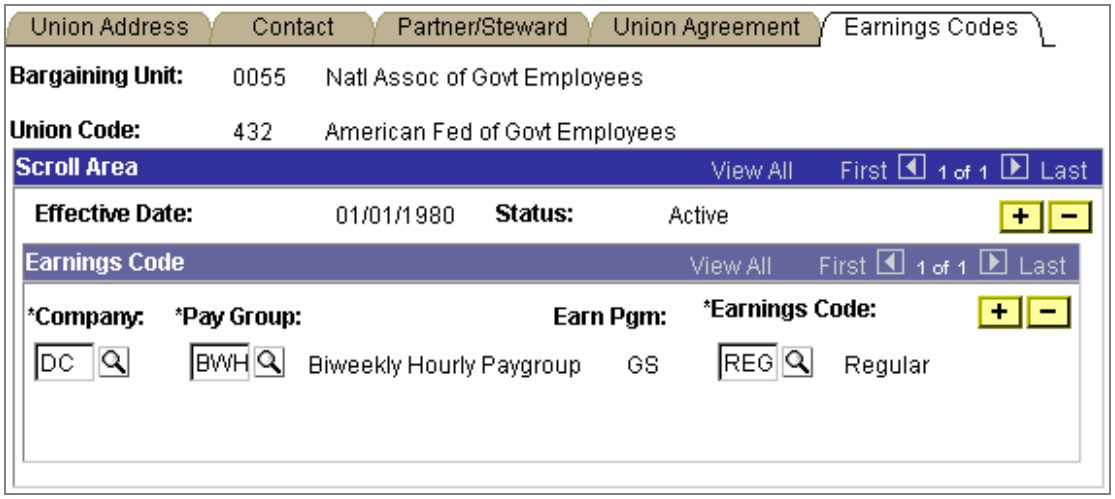


Union Table - Union Agreement page

Type highlights of the union agreement in the space provided for bargaining unit/union agreement text. Enter more text than is visible in the group box, if needed. Use the inner scroll bar to navigate to text off of the screen.

Entering Allowable Earnings Codes for Bargaining Unit Members

Access the Union Table - Earnings Codes page.



Union Table - Earnings Codes page

Company Designate the company name.

Pay Group, Earn Pgm (pay group, earnings program) Select the pay group. When you move out of this field, the system displays the associated earnings program.

Earnings Code Select each earnings code that is valid for this union within each pay group.

(USF) Entering Union Negotiability Appeals

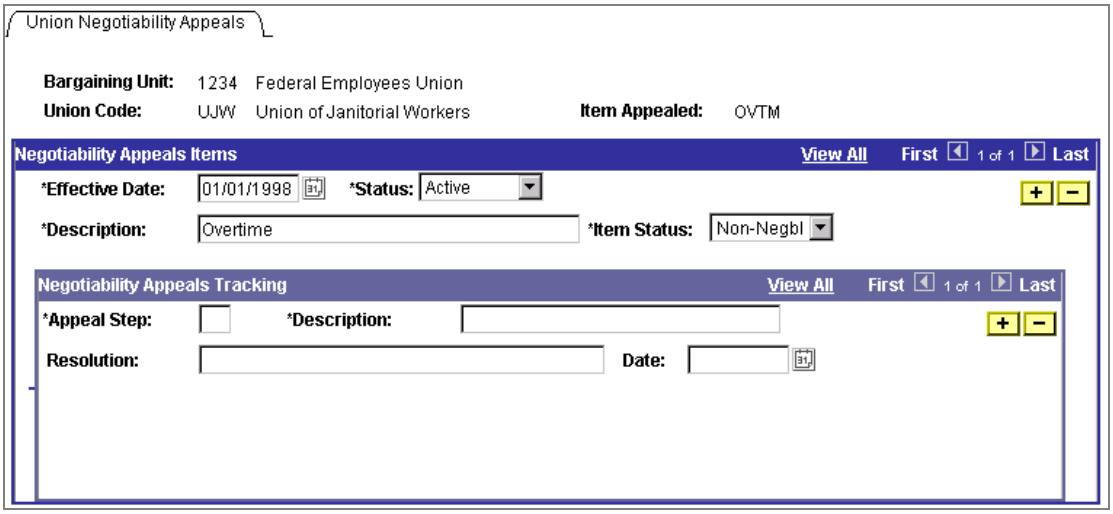
Once you've set up your union tables, use the Negotiability Appeals - Union Negotiability Appeals page to track union negotiability appeals items and the steps taken to resolve them.

Page Used to Enter Union Negotiability Appeals

Page Name	*Object Name*	*Navigation*	*Usage*
Union Negotiability Appeals	GVT_NEGBLTY_ITEMS	Administer Workforce, Manage Labor Relations (USF), Use, Negotiability Appeals, Union Negotiability Appeals	Track union negotiability appeal items. You must have previously set up your union tables.

Tracking Union Negotiability Appeals

Access the Negotiability Appeals - Union Negotiability Appeals page.



Negotiability Appeals - Union Negotiability Appeals page

Item Status Indicate the status of the appeal of this item. If the resolution affects the status of the item being appealed, update the **Item Status** field at the same time.

Appeal Step Use only for sequencing the events or steps. Enter steps *in the order* in which they happened, if known.

Resolution	When that step is resolved, describe the resolution.
Resolution Date	Enter the date on which the step was or will be resolved.

(USF) Creating Labor Relations Classifications

Labor disputes might arise in your agency periodically, both for individual employees and for groups, such as unions representing their members. To help you track the critical information you need to resolve conflicts, use the pages in the Manage Labor Relations and Administer Workforce (USF) menus.

In this section, we discuss how to:

- Specify disciplinary offenses.
- Enter disciplinary data for employees.
- Specify the first penalty matrix for indicating the offense level penalties.
- Define the recommended disciplinary actions for each offense level and type.
- Define disciplinary actions.

Pages Used to Set Up for Federal Labor Relations Management

Page Name	*Object Name*	*Navigation*	*Usage*
Disciplinary Offenses Table	DISCIP_TYPE_TABLE	Administer Workforce, Administer Workforce (USF), Setup, Disciplinary Offenses Table, Disciplinary Offenses Table	Enter disciplinary data for an employee.
Disciplinary Penalty Matrix 1	GVT_DISCIP_OFFNSES	Administer Workforce, Administer Workforce (USF), Setup, Disciplinary Offenses Table, Disciplinary Penalty Matrix 1	Specify the first penalty matrix for indicating the offense level penalties.
Disciplinary Penalty Matrix 2	GVT_RECMND_ACTIONS	Administer Workforce, Administer Workforce (USF), Setup, Disciplinary Offenses Table, Disciplinary Penalty Matrix 2	Enter the recommended actions.

Page Name	Object Name	Navigation	Usage
Disciplinary Step Table	GVT_DISCIP_STEP	Administer Workforce, Manage Labor Relations (USF), Setup, Disciplinary Actions Table, Disciplinary Step Table	Enter steps to be taken in the disciplinary process.
Disciplinary Events Table	GVT_DIS_EVENTS_TBL	Administer Workforce, Administer Workforce (USF), Setup, Disciplinary Events Table, Disciplinary Events Table	Delineate the disciplinary events that occur in pursuing disciplinary actions.

Specifying Disciplinary Offenses

To identify the various types of violations employees commit where managers may need to impose disciplinary actions and the recommended penalties for each offense, first set up the Disciplinary Offenses table, Disciplinary Penalty Matrix 1, and Disciplinary Penalty Matrix 2.

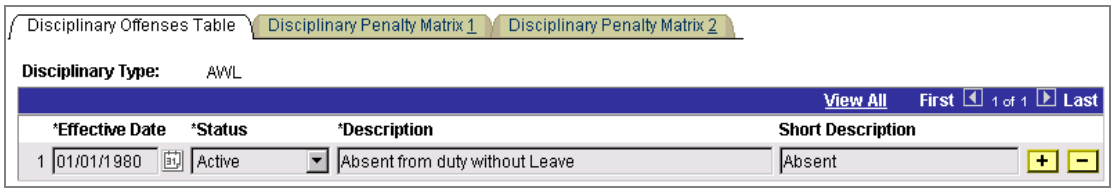
Sample Disciplinary Offenses and Descriptions

Your agency selects their disciplinary offenses and descriptions as needed. The following is a list of the values we have used in the model for managing labor relations.

Disciplinary Offenses	Descriptions
AWL	Absent without leave
DIS	Discrimination
FGH	Fighting
ICC	Improper use of credit card
INF	Inefficiency
INS	Insubordination
IPA	Improper political activity
ISL	Improper use of sick leave
LAT	Late for work
MIS	Misrepresentation
MVV	Safety violation-nonmotor vehicle
PER	Conducting personal affairs

Entering Disciplinary Data for Employees

Access the Disciplinary Offenses Table page.

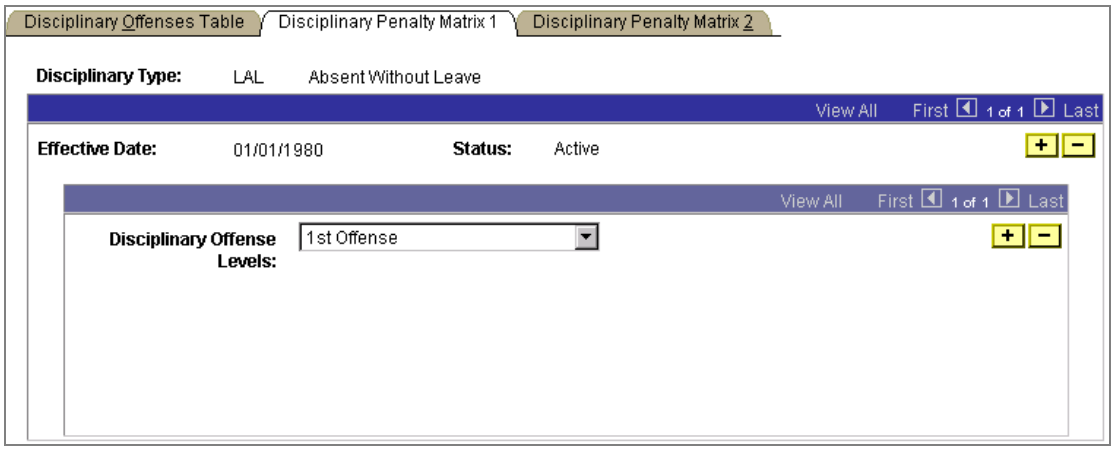


Disciplinary Offenses Table page

Effective Date Defaults to the system date, usually today's date. Change if you plan to use the **Disciplinary Type** listed for disciplinary actions that have an earlier effective date. We recommend that you set the effective date to a date that accounts for employee and job history, such as ***January 1, 1980.***T

Specifying the First Penalty Matrix for Indicating the Offense Level Penalties

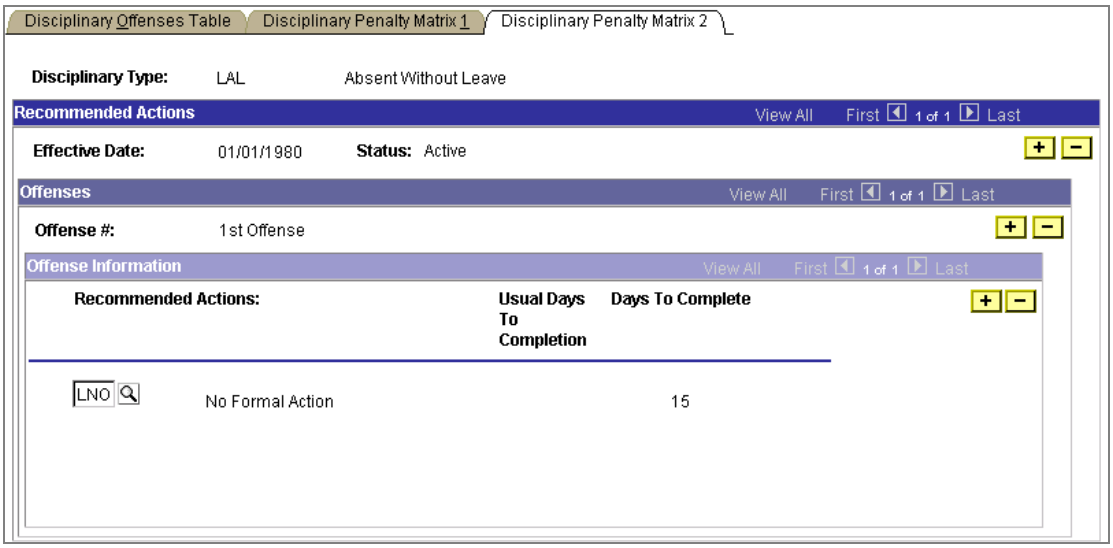
Access the Disciplinary Offenses Table – Disciplinary Penalty Matrix 1 page.



Disciplinary Offenses Table - Disciplinary Penalty Matrix 1 page

Defining the Recommended Disciplinary Actions for Each Offense Level and Type

Access the Disciplinary Offenses Table - Disciplinary Penalty Matrix 2 page.



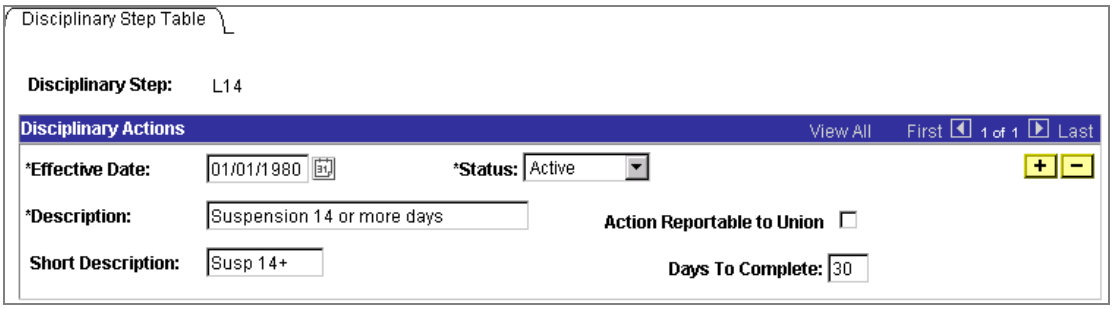
Disciplinary Offenses Table - Disciplinary Penalty Matrix 2 page

Recommended Actions Enter the recommended actions. The system automatically displays the **Usual Days To Complete,** as defined on the Disciplinary Events Table page.

This display helps managers approximate how long it will take to complete this action so they can plan how to fit each course of action into their workloads. Your labor relations specialists can establish these as experience dictates. However, government and agency policies or union agreements may affect these recommendations.

Defining Disciplinary Actions

Access the Disciplinary Actions Table - Disciplinary Step Table page.



Disciplinary Actions Table - Disciplinary Step Table page

Action Reportable to Union Select if the action disciplinary action should be reported to the union.

(USF) Using the Disciplinary Tracking System

Set up your disciplinary tables in either the Administer Workforce (USF) or the Manage Labor Relations (USF) menu. Once your disciplinary tables are set up, use the various disciplinary action pages to enter details and track actions for your agency's employees.

In this section, we describe how to:

- Describe disciplinary offenses.
- Record related disciplinary action.
- Enter disciplinary events to support disciplinary actions.

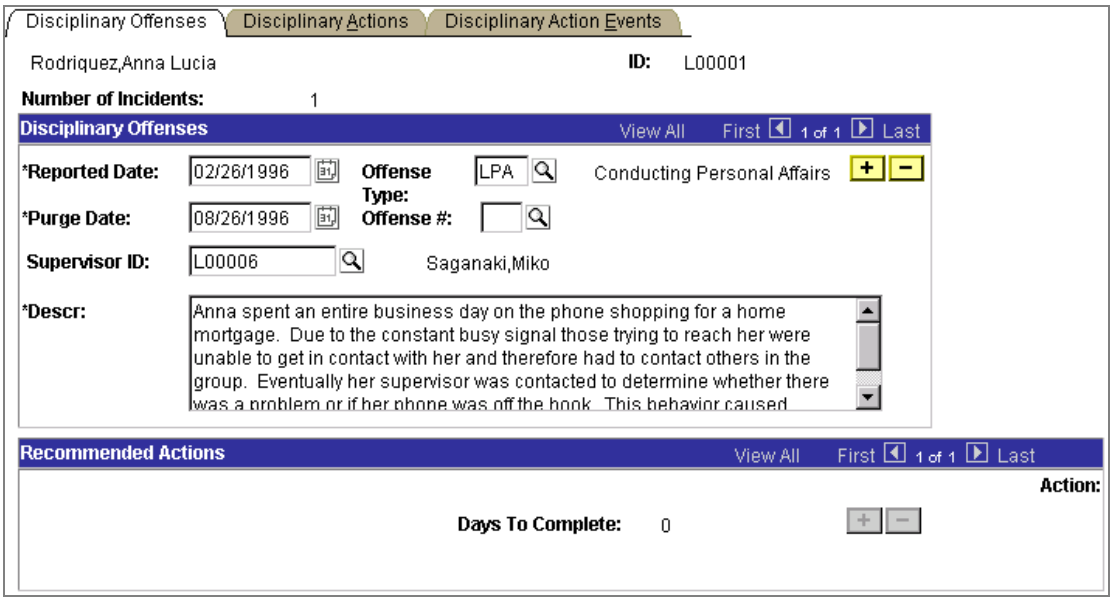
Pages Used to Enter Details About or Track Disciplinary Actions

Page Name	*Object Name*	*Navigation*	*Usage*
Disciplinary Offenses	GVT_DISCIPLIN_ACT1	Administer Workforce, Manage Labor Relations (USF), Use, Disciplinary Actions, Disciplinary Offenses	Enter details about the disciplinary offenses that led to the disciplinary action being taken. First set up offense types on the Disciplinary Offenses Table page.
Disciplinary Actions	GVT_DISCIPLIN_ACT2	Administer Workforce, Manage Labor Relations (USF), Use, Disciplinary Actions, Disciplinary Actions	Record what actions took place in response to the offense. First enter data on the Disciplinary Offenses page.
Disciplinary Action Events	GVT_DISP_ACTN_EVNT	Administer Workforce, Manage Labor Relations (USF), Use, Disciplinary Actions, Disciplinary Action Events	Enter an event that describes the steps of the disciplinary action that have taken place thus far. First enter data on the Disciplinary Offenses and Disciplinary Actions pages.

Note. Also access these pages through the alternate navigation, Administer Workforce, Administer Workforce (USF), Use2.

Describing Disciplinary Offenses

Access the Disciplinary Offenses page.



Disciplinary Offenses page

Number of Incidents — Each time you enter a new disciplinary offense for this employee, the system calculates and displays the total number of incidents.

Reported Date — Defaults to the system date, usually today's date. Change unless the disciplinary action begins today.

Purge Date — The system automatically inserts a purge date of six months from the reported date.

Offense Type and **Offense Number** — Select an offense type and number.

Once you have selected an offense type and number, the system automatically displays a list of all disciplinary actions recommended for this particular offense. The system also displays the recommended number of **Days To Complete** each action. These recommendations were created in the Disciplinary Penalties Matrices tables.

Supervisor ID — Defaults from the employee Employment Data page. Change if necessary.

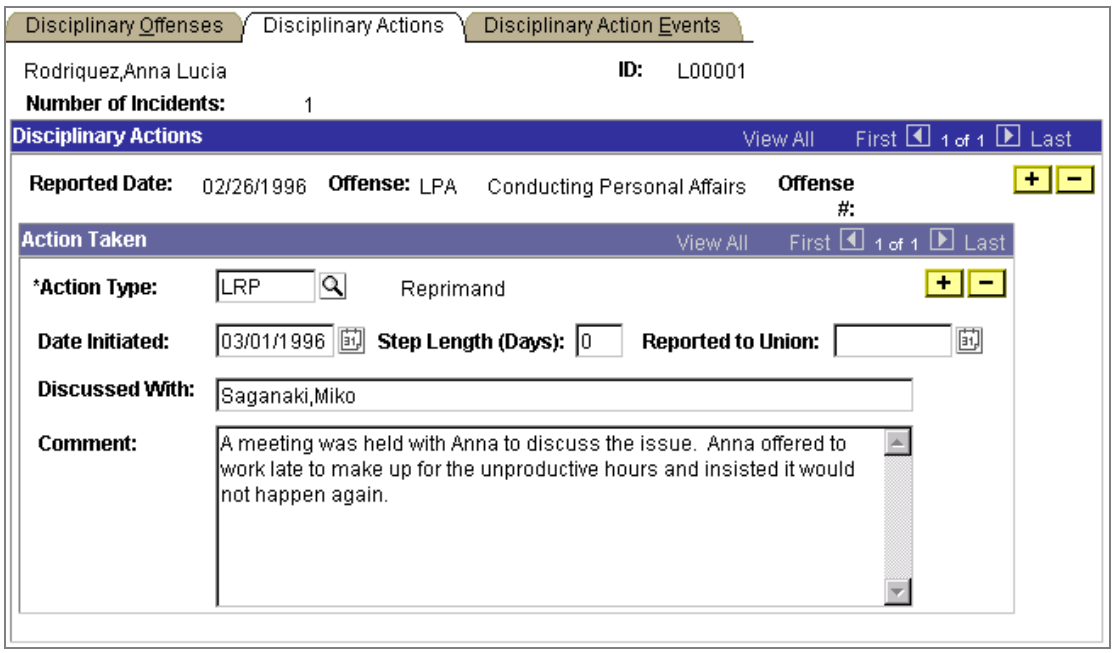
Incident Description — Enter an incident description longer than the lines shown.

See Also

(USF) Creating Labor Relations Classifications

Recording Related Disciplinary Action

Access the Disciplinary Actions page.



Disciplinary Actions page

Action Type Select an action type to record the action taken to resolve the problem.

Date Initiated Defaults to today's date. Change unless the action taken was initiated today.

Step Length (Days) If the action has a limited time frame, enter the duration, in days.

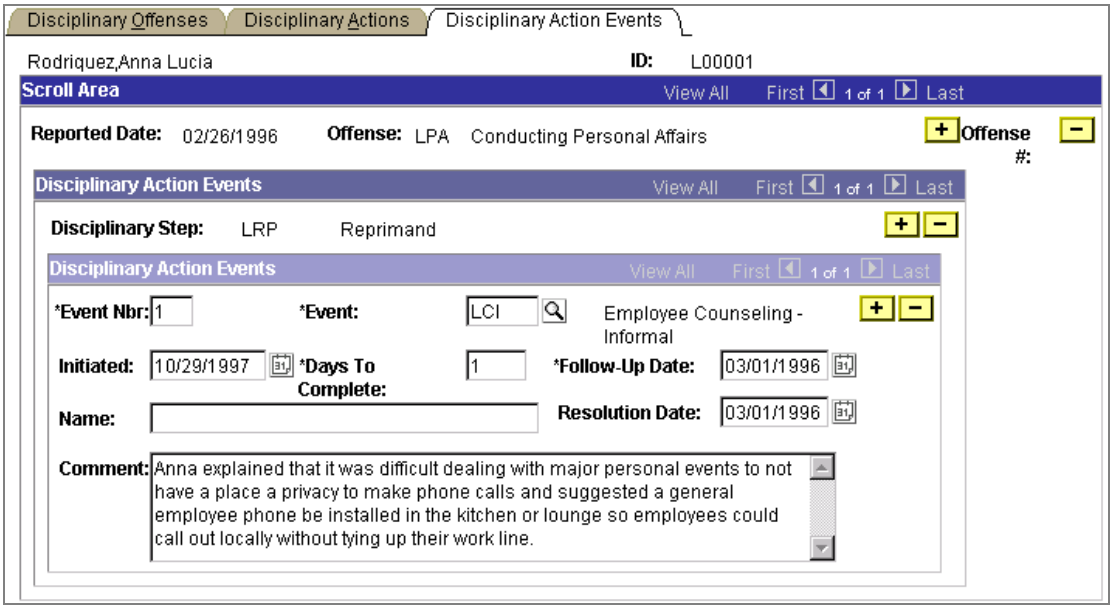
Reported To Union If your agency identified this type of action as reportable to the union(s), enter the date it was reported to the union(s).

Discussed With Enter the name of the person with whom you discussed the action (for example, a labor relations specialist).

Comment Once you have entered the data about the action taken, record the events supporting the action.

Entering Disciplinary Events to Support Disciplinary Actions

Access the Disciplinary Action Events page.



Disciplinary Action Events page

Event Nbr (event number)
These disciplinary action events are stored and presented in numerical order based on the event number you assign. We recommend that you assign event numbers chronologically to give yourself a picture of the events as they happened. For events initiated on the same day, the event number can play a critical role when trying to avoid or settle litigation.

Event
Select an event that describes what took place at this point.

Initiated
The date the event was initiated defaults to today's date. Change unless it was actually initiated today.

Days To Complete
(Optional) Estimate a number of days to complete this event if you want or let it default from the Disciplinary Events table.

Name
Include the name (if any) of the person who initiated this event or was primarily responsible for resolving it.

CHAPTER 13

Viewing Summary Workforce Information

This chapter provides an overview of how to:

- View employee job history.
- View employee personal and job data.
- View other summary pages in PeopleSoft Human Resources.

Viewing Employee Job History

Viewing employee job history provides a quick summary of important job details of current and historic employment records.

Pages Used to View Employee Job History

Page Name	*Object Name*	*Navigation*	*Usage*
Job Summary	JOB_SUMMARY	Administer Workforce, Administer Workforce (GBL), Inquire, Job Summary, Job Summary Administer Workforce, Administer Workforce (USF), Inquire, Job Summary, Job Summary	View an employee's job history.

Page Name	Object Name	Navigation	Usage
Salary Components	COMP_JOB_SUMM_SEC	Administer Workforce, Administer Workforce (GBL), Inquire, Job Summary, Compensation, Components Click the Components link on the Compensation tab of the Job Summary page.	View salary compensation information.

See Also

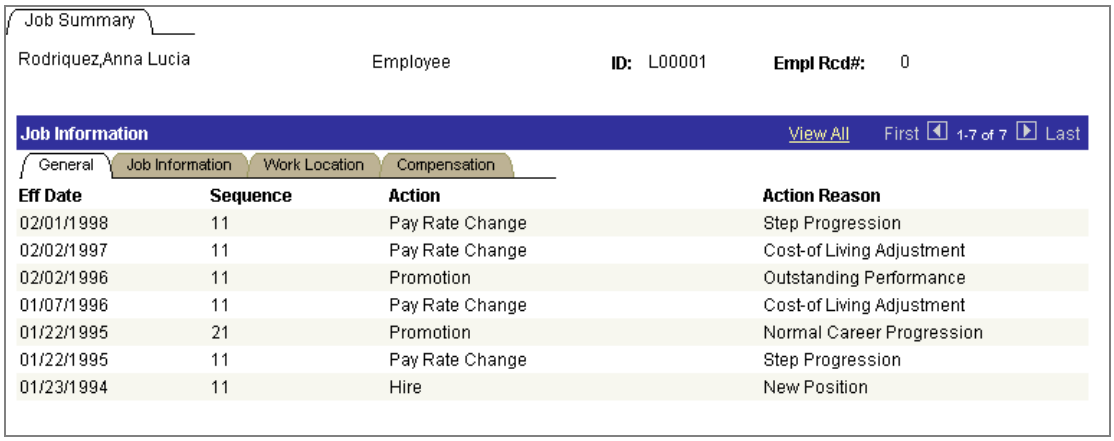
"Hiring Your Workforce"

"Updating Workforce Information"

"USF Processing Personnel Action Requests"

Job Summary Page

Access the Job Summary: General page.



Job Summary: General page

Common Page Information

Eff Date (effective date), **Sequence** — The effective date and effective date sequence, if any, is available for each personnel action. The effective date sequence tracks actions that occur on the same day.

General Tab

Action, Action Reason — Displays the action and action reason for the action.

Job Information Tab

General | Job Information | Work Location | Compensation

Eff Date	Sequence	Jobcode	Empl Type	Empl Status	Full/Part Time	Reg/Temp	Standard Hours	Work Period
02/01/1998	11	Per Asst 8	Salaried	Active	Full-Time	Regular	40.00	
02/02/1997	11	Per Asst 8	Salaried	Active	Full-Time	Regular	40.00	
02/02/1996	11	Per Asst 8	Salaried	Active	Full-Time	Regular	40.00	
01/07/1996	11	Per Clerk	Salaried	Active	Full-Time	Regular	40.00	Weekly
01/22/1995	21	Per Clerk	Salaried	Active	Full-Time	Regular	40.00	Weekly
01/22/1995	11	Clk Typist	Salaried	Active	Full-Time	Temporary	40.00	Weekly
01/23/1994	11	Clk Typist	Salaried	Active	Full-Time	Temporary	40.00	Weekly

Job Summary: Job Information page

Jobcode — View job code information for this employee after each personnel action.

Empl Type (employee type) — The employee type after each personnel action..

Empl Status (employee status) — The employee's status after each personnel action.

Full/Part Time — Indicates whether the employee is full or part time after each personnel action.

Reg/Temp — Indicates whether the employee is regular or temporary after each personnel action.

Standard Hours — The standard hours after each personnel action.

Work Period — The work period after each personnel action.

Work Location Tab

General | Job Information | Work Location | Compensation

Eff Date	Sequence	Position	Company	DeptID	Sal Plan	Grade	Pay Group	Frequency
02/01/1998	11	Personnel	DC	E&L Rel	0000	08	LBS	Biweekly
02/02/1997	11	Personnel	DC	E&L Rel	0000	08	LBS	Biweekly
02/02/1996	11	Personnel	DC	E&L Rel	0000	08	LBS	Biweekly
01/07/1996	11	Per Clerk	DC	E&L Rel	0000	05	LBS	Biweekly
01/22/1995	21	Per Clerk	DC	E&L Rel	0000	05	LBS	Biweekly
01/22/1995	11	Clk Typist	DC	Labor Rel	0000	04	LBS	Biweekly
01/23/1994	11	Clk Typist	DC	Labor Rel	0000	04	LBS	Biweekly

Job Summary: Work Location page

Position, Company, DeptID (department ID)**, Sal Plan** (salary plan)**, Grade, Pay Group, Frequency** — The employee's position, company code, department ID, pay group, and frequency for the job the employee was or is in, as well as the salary plan and salary grade.

Position Nbr (position number) — If you're driving part or all of PeopleSoft Human Resources by position, you'll see a position number for each position to which you've assigned this employee.

Compensation Tab

General | Job Information | Work Location | Compensation

Eff Date	Sequence	Annual Rt	Monthly Rt	Daily Rt	Hrly Rate	Currency	Change Percent	Components
02/01/1998	11	34,174.40	2,847.87		16.43	USD	0.000	Components
02/02/1997	11	32,406.40	2,700.53		15.58	USD	0.000	Components
02/02/1996	11	31,345.60	2,612.13		15.07	USD	0.000	Components
01/07/1996	11	23,524.80	1,960.40		11.31	USD	0.000	Components
01/22/1995	21	22,942.40	1,911.87		11.03	USD	0.000	Components
01/22/1995	11	21,091.20	1,757.60		10.14	USD	0.000	Components
01/23/1994	11	19,864.00	1,655.33		9.55	USD	0.000	Components

Job Summary: Compensation page

Annual Rt (annual rate), **Monthly Rt** (monthly rate), **Daily Rt** (daily rate), **Hrly Rate** (hourly rate), **Currency, Change Percent**
View the employee's compensation rate in annual, monthly, daily, or hourly terms, and in a given currency. If a personnel action results in a change in the compensation rate for this employee, the system displays the percentage of change.

Components
Click this link to display the Salary Components page.

Viewing Salary Compensation Information

Access the Salary Components page.

Salary Components

Rodriquez,Anna Lucia **ID:** L00001 **Empl Rcd#:** 0

Compensation Rate: 34,174.40 USD

Compensation Frequency: A Annual

Pay Components

Amounts | Changes

Rate Code	Seq	Details	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1	0	Details						

Salary Components page

Rate Code
Select a 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, or group-based rate code, is inserted as a default on the Compensation page, the values for these rate codes are display-only; you can't delete them.

Seq (sequence)
Indicates multiple use of the same rate code if it is used more than once.

Amounts Tab

Comp Rate (compensation rate), **Currency**	The compensation rate for the compensation components, and the currency.
Frequency	The compensation frequency for the employee.
Details	Click this button to open the Details page, where you can review the description, compensation rate type, and rate code class associated with the rate code.
Points	The salary points associated with this rate code, if any. Set the points monetary value on the Company Table page. Associate point value (an integer) with rate codes on the Default Compensation and Non-Base Compensation pages, Salary Step Components page, and Compensation page. To use points, select the Salary Points check box on the Installation Table page.
Percent	If the rate type for this rate code 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	Select a rate code group. A rate code group enables you to be more specific when calculating percentage-based components as part of your employee compensation package.

Changes Tab

Apply FTE (apply full time equivalent)	Select if you want the value associated with the rate code to be multiplied 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 rate codes of type percent.
Change Amount	The overall change amount in this pay component rate.
Change Points	The overall change amount (in points) for this pay component. This field is visible only if Salary Points is selected on the Installation Table page.
Change Percent	The overall change amount for this pay component. This field isn't available for rate codes that have a rate code type of percent or points.
Converted Comp Rate	The converted compensation rate for this pay component. The system converts all base pay components to the currency and compensation frequency you specify.

(USF) Viewing Employee Personal and Job Data

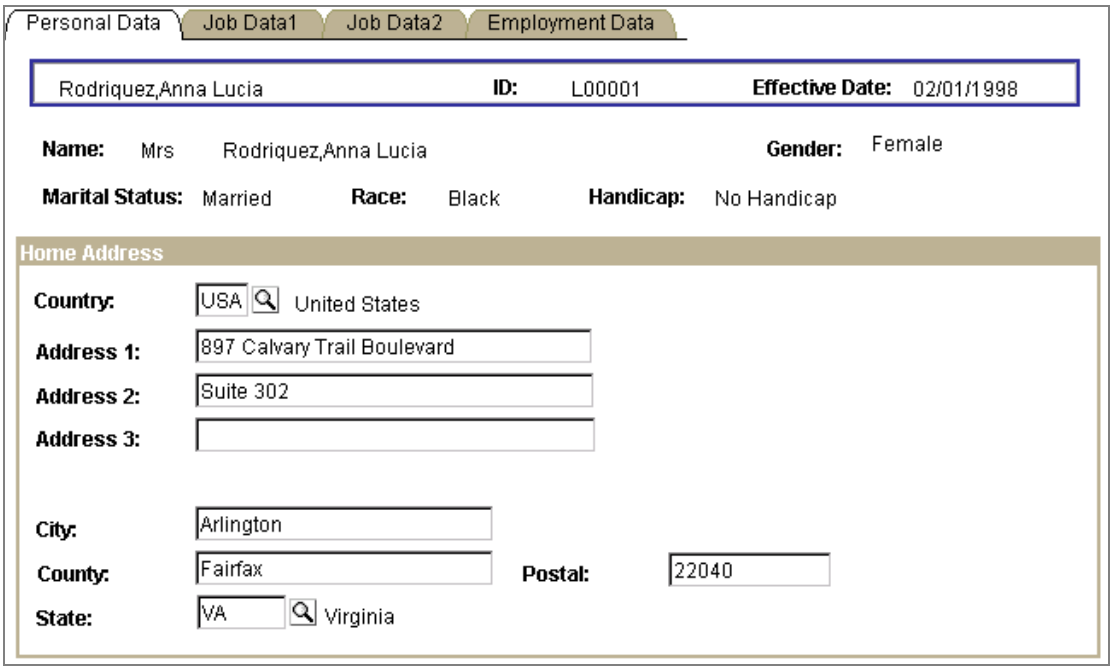
Use the Personal Data inquiry component to view employee personal and job data.

Pages Used to View Personal and Job Data

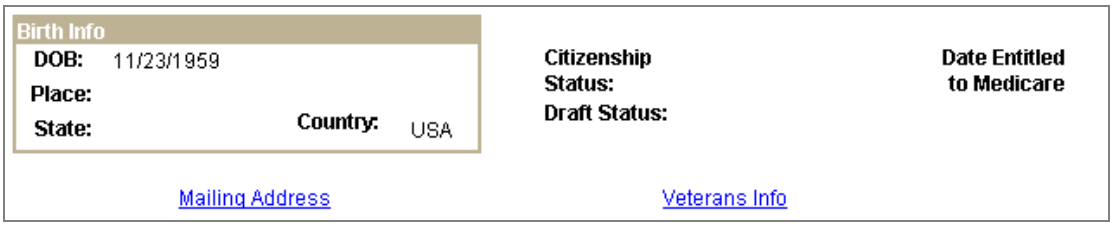
Page Name	*Object Name*	*Navigation*	*Usage*
Personal Data	GVT_PERS_INQ	Administer Workforce, Administer Workforce (USF), Inquire, Personal Data, Personal Data	View employee personal data.
Mailing Address	GVT_MAILADDR_SEC	Administer Workforce, Administer Workforce (USF), Inquire, Personal Data, Mailing Address	View the employee's mailing address.
Veterans Info (veterans information)	GVT_VETINF_INQ_SEC	Administer Workforce, Administer Workforce (USF), Inquire, Personal Data, Veterans Info	View veteran's information for this employee.
Job Data1	GVT_JOB_INQ	Administer Workforce, Administer Workforce (USF), Inquire, Personal Data, Job Data1	View employee job data.
Benefits/FEHB Data		Administer Workforce, Administer Workforce (USF), Use, Inquire, Personal Data, Job Data1, Benefits/Retirement Data	Specify the benefit program in which the employee is enrolled for benefits in PeopleSoft Human Resources or in PeopleSoft Benefits Administration.
Job Data2	GVT_JOB_INQ2	Administer Workforce, Administer Workforce (USF), Inquire, Personal Data, Job Data2	View additional job data.
Employment Data	GVT_EMPLOY_INQ	Administer Workforce, Administer Workforce (USF), Inquire, Personal Data, Employment Data	View employment data.

Viewing Employee Personal Data

Access the Personal Data page.



Personal Data page (1 of 2)

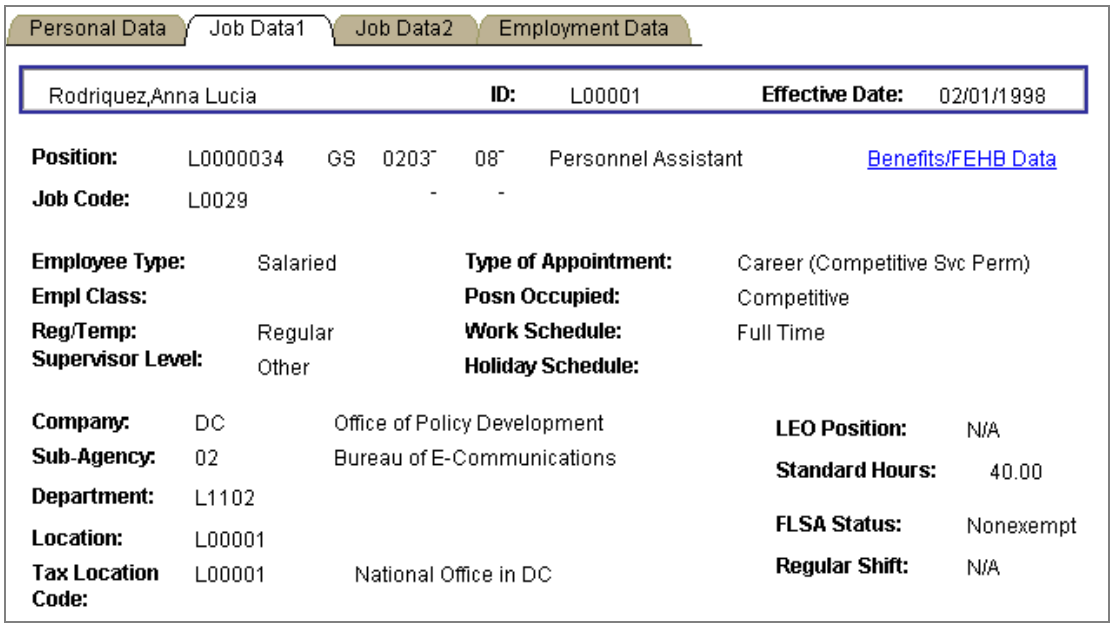


Personal Data page (2 of 2)

The Personal Data page displays information on employee hire date, birth date, home address, marital status, birth information, citizenship, draft status, Medicare entitlement, race, and handicaps. Click the **Mailing Address** link to view the employee's mailing address. Click the **Veterans Info** link to view veteran's information for this employee.

Viewing Employee Job Data

Access the Personal Data - Job Data1 page.



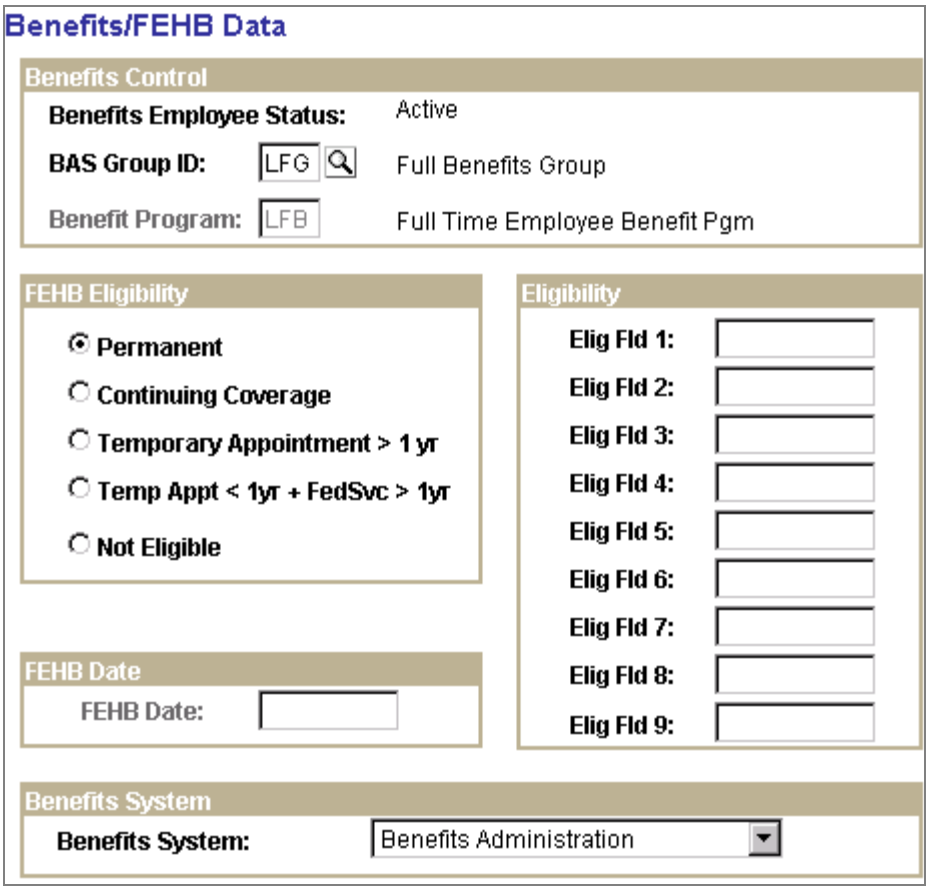
Personal Data -- Job Data1 page

Job Data1 displays the employee's position number, job code, employee type, class, type of appointment, position occupied, work schedule, agency, subagency, department, location, tax location, LEO position, FLSA status, and other job-related information.

Click the **Benefits/FEHB Data** link to view information on this employee's benefits and retirement data.

Specifying Employee Benefit Programs

Access the Personal Data - Job Data1: Benefits/FEHB Data page.



Personal Data - Job Data1: Benefits/FEHB Data page

BAS Group ID — Select a BAS group ID.

Benefit Program — Select a benefit program.

FEHB Eligibility (federal employees health benefits eligibility) — Click the appropriate option to indicate the federal employees health benefits eligibility. If you select ***Not Eligible,*** the **FEHB Date** field becomes available for entry, and you may enter the **FEHB Date**.

FEHB Date — Information field to capture the date that the employee is eligible for FEHB. Typically the date is one year from hire.

Eligibility

Elig Fld 1-9 (eligibility configuration fields 1-9) — Enter values for this employee. These are client-definable fields that can be used to further filter employees' eligibility for a specific benefit.

For information on availability of these fields, contact your Headquarters Agency's Personnel Policy officials.

Benefits System Choose which PeopleSoft benefits system you are using to administer this employee's benefits: ***Base Benefits*** or ***Benefits Administration.***

See Also

PeopleSoft Human Resources PeopleBook: Base Benefits, "Setting Up Benefit Support Tables" and "Enrolling Participants"

Viewing Other Summary Pages in PeopleSoft Human Resources

Several other display-only pages summarizing employee data are available for you to review in PeopleSoft Human Resources. Most of them derive information you enter in other PeopleSoft Human Resources business processes, such as Planning Salaries, Tracking Global Assignments, and Administering Training. However, you'll also find them useful for planning and analysis when you work in the Administer Workforce menus.

Following are some of the summary pages:

- Employee Data Summary: Displays information on employee current status, hire date, birth date, marital status, standard work hours, pay group, job code, and other job- and salary-related information.
- Career Assignment Summary: Displays the actual job path the employee has followed in the organization. By tracking employee movements through salary structures and manager levels, you'll get a feel for where the employee has been in your organization so far.
- Compensation History: Displays the history of all pay rate changes the employee has received, which is particularly useful when you are planning new increases.
- Immediate Family Summary: Lists all dependents that are a part of the employee's immediate family. Immediate family is defined as dependents that are the employee's spouse, son, or daughter. You'll find this page helpful for determining eligibility for various types of benefits your organization offers to employees, their spouses, and children.
- Training Summary: Displays student training history, which is helpful when determining whether students are receiving adequate training to perform their current jobs; to see if they've taken all course prerequisites; and for career and succession planning.
- Injury Summary: Provides an overview of the health and safety incidents in which this individual has been involved, including injuries and illnesses and the nature of the incidents.

The Employee Data pages are also in the Administer Base Benefits menu.

CHAPTER 14

(USF) Administering Personnel Action Requests

This chapter provides an overview of how to:

- Track and route a personnel action request (PAR) through reviews and completion.
- Understand workflow.
- Initiate and request personnel actions.
- Authorize and approve personnel actions.
- Process human resources personnel actions.
- Cancel or correct a personnel action request.
- Print request for personnel action and notice of personnel action reports.
- View summary pages.
- Generate a Wage and Separation report.

Overview of the Administering PAR System

The administering PAR system provides you with the power to process action requests quickly and easily. The system automatically routes a wide variety of requests directly to reviewing officials, and on to human resources, in the path your agency designates.

If anyone needs further information, the system automatically routes that inquiry back to the originator. All involved are included in the communication loop and always know that their requests are moving through a well-mapped review, authorization, and approval cycle.

Note. Keep in mind that the description and samples described throughout this book are illustrative, flexible models that you can adapt for your agency's personnel administration system. Your agency can set up the Administer Workforce system's routing, security, accessing, processing, and many other features to meet your individual agency needs and requirements.

Using a streamlined menu structure, you can navigate quickly and easily through the whole process. Using PeopleSoft workflow, you indicate the level of authorization and the system routes the request through the process for you.

Significant features of the PAR system include:

- Flexible work-in-progress processing.
- Cancellation and correction functionality.
- Reviewed flag processing for retroactive personnel actions.
- Enhanced navigation with pages.
- Issuing awards and bonuses.
- Detail assignment processing.
- Support for the personnel office identifier (POI) signature requirement.

Before You Begin

Note. Begin every personnel action request on the Data Control page. The first time you open the page, the most recent personnel action request appears automatically. Before creating a new request, you must insert a new row for all actions or changes.

In order to save time, the system assumes you want to continue viewing and updating information on the same employee, so when you move to a new page in the group, information for that same employee appears automatically.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "(USF) Setting Up Human Resources Management Tables" and "(USF) Setting Up the Work-in-Progress Management System"

Common Elements Used in This Chapter

PAR Status

The PAR status code automatically defaults to ***Requested*** for new actions. Leave this as a work-in-progress request with that status until you have complete data. After you have completed all the necessary information, keep the PAR status as ***Requested*** to send it on to human resources officials for approval and processing.

If you aren't ready to submit the request, change the status to ***Initiated,*** and keep working on it until you're done. Then change the status to ***Requested*** to submit it.

After completing the HR Processing pages and reviewing the data, assign a status of ***Processed by HR*** to approve and finalize this request.

Once you assign the status of ***Processed by HR,*** the request becomes an actual event and is posted in the system to interface with PeopleSoft Payroll, Benefits, or other related areas.

If the request is invalid or needs further information, assign a status of ***Disapproved*** or ***Return to Sender.***

Tracking and Routing a PAR Through Reviews and Completion

The Employee, Supervisor, and Human Resources Processing pages are identical. The only difference is in the type of data that is accessible to each group, according to security options and allowable actions.

Your agency determines the actions and data available to employees, supervisors, and human resources processors. Actions may include creating requests, issuing approvals and authorizations, and finalizing actions. Or they may require returning an action to the originator; asking for more information; or withdrawing, canceling, or correcting an action. Decisions on these issues are implemented using the WIP Activity Table (work-in-progress activity table) page.

Employees may request only their allowable actions; therefore, an operator sees only certain options, such as Family/Benefits Change or Retirement. Supervisors may request, approve, and authorize those and other specific actions. When a supervisor opens the pages, their list reflects whatever your agency designates, such as promotion, demotion, detail assignment, reassignment, bonuses and awards, and others. They may also return an action to the originator for more information, or disapprove a request and render it inactive.

Human resources officials have the authority to initiate, approve, and finalize all possible actions. Therefore, human resources officials, along with hiring, tenure changes, and other actions that an employee or supervisor wouldn't usually initiate, can access *all* of the personnel actions in any phase of the cycle. For *finalized* actions that have already completed the processing cycle, human resources has the exclusive right to cancel and correct.

The PAR processes provide both flexibility and modification capacity. You can process new personnel actions that are effective dated prior to existing personnel actions and define the codes for requests in a truly user-defined environment.

Adding and Updating Data

For U.S. Federal Government customers, in order to add, update, or change any employee data, you create a PAR. To submit and route and track a PAR automatically through the approval process, assign a PAR work-in-progress WIP status code that indicates its position in the request cycle and determines where to send it.

Automatically Routing the PAR

By changing the request status and saving the page, reviewers acknowledge receipt and approval, and send a PAR forward through workflow. Each review level serves as verification that the information is complete and that the necessary documents are attached. The reviewers may also enter their own comments. Your agency can set up and route request cycles for each type of request from creation through various reviews, including as many or few reviews as desired, and on to final Human Resources completion.

Selecting a PAR Status

If you want to open a request, fill in partial data and then complete it later, open a request and assign a PAR status of *Initiated.* While you gather additional information, the request stays within your own domain and control. You can revisit it as often as needed until you are ready to submit it for review.

When your request data is complete and you want to proceed with the automatic routing review cycle, submit the request by assigning a PAR status of *Requested.* By doing so, you make the request official. Once the originator submits a *Requested* action, workflow retrieves it and automatically routes it to others who are involved in the processing, and the authorizing and approving officials review its merits. It may go through a review cycle that includes *1st Authorized* and *2nd Authorized* by specific supervisors and managers, *Approved/Signed* by second-level managers, and finally to the status of *HR* (processed by HR), according to your agency's requirements.

If clarification or additional information is needed, a reviewer can choose the status of *Returned for More Information.* Returning it to the originator restarts the process. A reviewer can also disapprove a request by assigning the *Disapproved* status, which stops the process altogether. During the review cycle, the originator can also withdraw a request while it's still in the work-in-progress status.

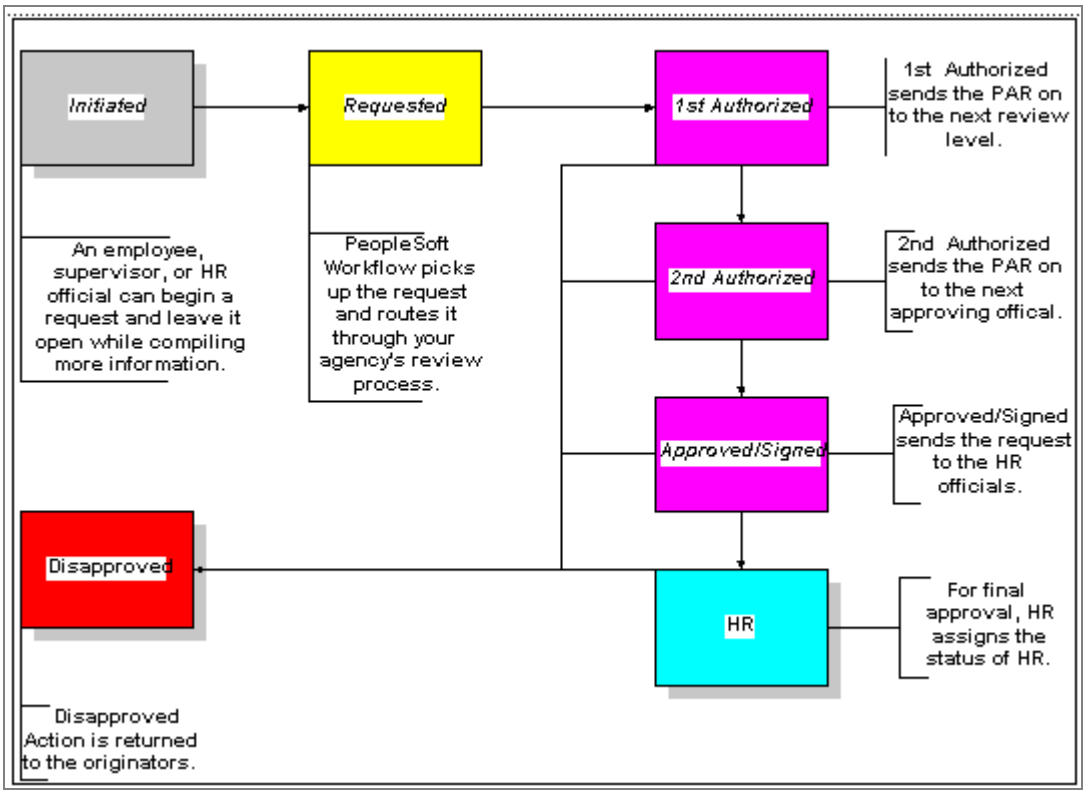
Only the originator can cancel or change and resubmit a request that is in progress. Because other supervisors, managers, and human resources officials don’t have the ability to change request data, if a request needs to be *Canceled,* you must return it to the originator.

When an operator chooses a work-in-progress status and assigns a PAR status code, this code indicates the request's status and position and enables workflow to route and monitor it through the approval cycle.

We provide a general example of the review cycle, though your agency can set it up differently if necessary.

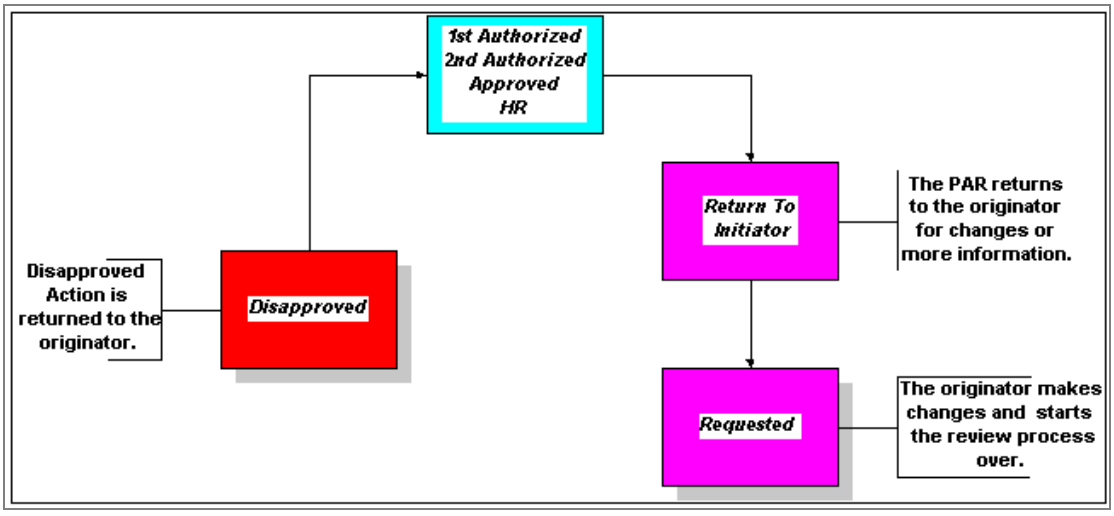
An Overview of PAR

Following is an overview of a sample process:



An example of the process of approving a PAR

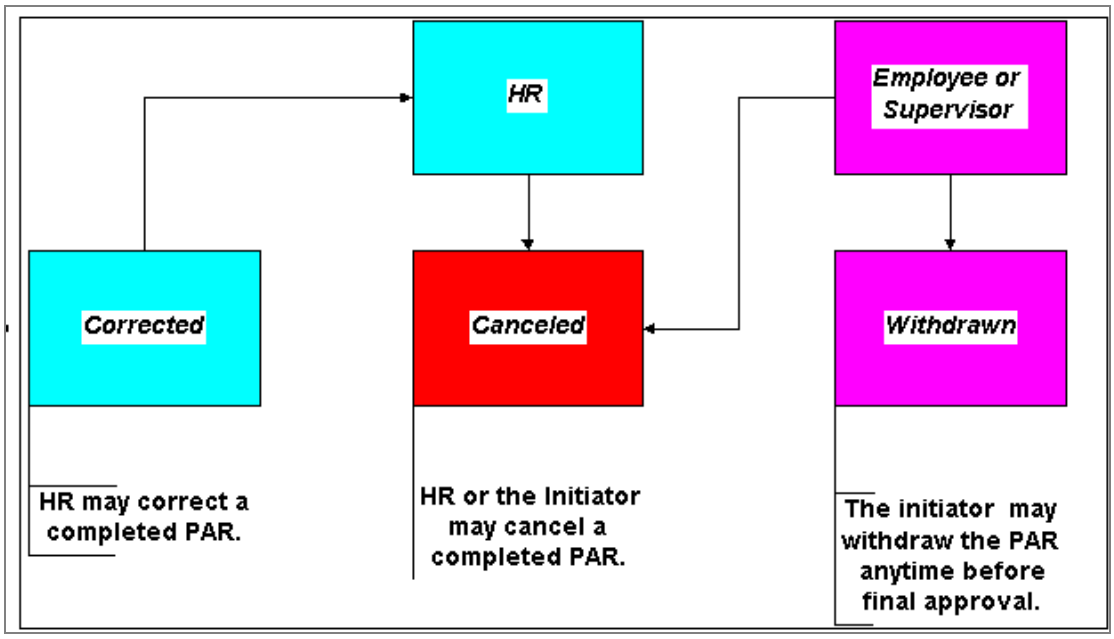
Disapproving or Returning a Request



Return or disapproval of a PAR before completion

Note. Although a status of Returned/Disapproved is delivered, workflow isn't part of this feature.

Cancellation, Correction, or Withdrawal of a Request



Cancellation, correction, or withdrawal of a PAR

Identifying PAR Status Codes

Following are definitions for each work-in-progress status and PAR status code that are set up in the sample data delivered with your system:

Work-In-Progress Status	*PAR Status Code*	*Definition*
Initiated	INI	Indicates an action is open, but not yet submitted as a request. For various reasons, originators may begin a request and then find they need additional time or data before completing their work on that action. By assigning a status of Initiated, originators can leave the request open until it's ready to submit. Supervisors may need extra time to develop supporting documentation, such as job codes, and can assign a status of *Initiated* to designate that their work is in progress.

Work-In-Progress Status	*PAR Status Code*	*Definition*
Requested	REQ	To submit a request, assign a status of *Requested.* Most requests then go automatically to the first-level supervisor for approval. An exception is the request for family/benefits change; you may want to set the system up to send this type directly to a human resources (HR) official to be processed. Or when a request originates in the HR department, it may go directly to an HR official to be processed.
1st Authorized	1st	The first-level reviewer assigns a status of *1st Authorized* to send a request forward to the next review level.
2nd Authorized	2nd	Another first-level reviewer sends a request forward to the next review level by assigning a status of *2nd Authorized.*
Approved/Signed	SIG	A second-level reviewer sends a request forward to an HR official to be processed by assigning a status of *Approved/Signed.*
Processed By Human Resources	HR	Only human resources officials can assign the status of *Processed By Human Resources.* They first review and complete the request and may add the appropriate Nature of Action code, Legal Authorities, and Remarks. They indicate final approval by assigning the status of HR. The request then becomes an actual event. A status of HR is final and can't be changed by anyone. Once a request becomes an actual event, it is then available for further consideration and processing by payroll, benefits, interface reports, and other areas.
Return for More Information	RET	Anywhere in the process, a reviewer can request more information or clarification by assigning a status of *Returned for More Information* and can include a comment such as, "I need further information." The request goes back to the originator. When originators get the returned request, they add the information, reassign a status of *Requested,* and the process begins again.
Withdrawn	WTH	The original creators of the request may withdraw a request if it is sent back to them for any reason. Human resources may withdraw a request when it is proven invalid or for some reason no longer is needed.

Work-In-Progress Status	*PAR Status Code*	*Definition*
Disapproved	DIS	At any point in the process, a reviewer can disapprove a request by assigning a status of *Disapproved* and entering the reason in the Comments field. This causes the request to be sent back to the originator either for cancellation or for the originator to change and resubmit it.
Corrected	COR	Only a human resources official has the authority to perform a correction after a request has completed the approval cycle and been finalized.
Canceled	CAN	A human resources official has the authority to perform a cancellation after a request has completed the approval cycle and been finalized. The *Canceled* status removes the request from the active request system, leaving only the tracking record history. Or if the originator receives a returned request, the originator may assign a status of *Canceled.*

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Using PeopleSoft Workflow"

Processing of PAR Actions

The PeopleSoft Human Resources for U.S. Federal Government system has separate tables for managing PAR, and these tables hold data until each action has been approved and completed by human resources. Any records held in the separate tables haven't completed the PAR process and so virtually don't exist to the rest of the system. After completion, the data is automatically updated to system tables to enable other processes, such as those in PeopleSoft Payroll, Benefits Administration, and Time and Labor.

In order to support the PAR processing concept, all of these records have been effective-dated and have been tied together with common keys. Because the three records (GVT_JOB, GVT_PERS_DATA, and GVT_EMPLOYMENT) work as one, when a user inserts a row on the PAR Data Control page, that action inserts a row into all three records.

Once a PAR has successfully worked its way through the approval process, is processed by human resources as completed, and has become an actual event, it is ready to be copied into the three counterpart records (JOB, PERSONAL_DATA, and EMPLOYMENT). The process is accomplished instantly, and the user is unaware of updating to the other tables.

However, if the PAR action has an effective date that is later then the system date, when the action is saved, then only JOB is updated. PERSONAL_DATA and EMPLOYMENT are updated only when the date of the action is equal to the system date. This is because the counterpart to GVT_JOB, which is JOB, is effective-dated. Therefore, it receives the future effective-dated action and ignores it until that date arrives.

Scheduling PAR Push

In order to push these future effective-dated rows at the correct time, PeopleSoft has developed an Application Engine process called PAR Push that should be scheduled to run at the beginning of each day.

The PAR Push process checks for any PARs that haven't been copied into the counterpart records and that have an effective date less than or equal to the system date, and then copies them over.

By scheduling the PAR Push process to run every day, no intervention by the user is required. The system is automatically always held in sync.

To schedule the PAR Push process, go to Administer Workforce, Administer Workforce (USF), Process, Process PAR Push.

Whether the online SQLExecs or the application engine is moving the data, the method used is basically the same. Three views have been created to extract the correct data from the PAR records. These views have been developed to have an output that is structured identically to the record into which data is inserted.

When the system determines that an action should be copied to the counterpart tables, it inserts into those tables with a subselect that is a Select * from the appropriate view where the keys equal the row that requires copying.

The other two, GVT_PD_PUSH_VW and GVT_EMP_PUSH_VW, select the completed row that is the Max Effective Date and Max Effective Sequence less than the system date. This is because the records being inserted aren't effective-dated. Therefore, only one row is inserted—the row that is correct on the date in question. The result of the use of these views is that all additions or removals of fields on the PAR records, and to their counterparts, require adjusting the views in order to keep them in sync.

Understanding Workflow

Many of the tasks you perform throughout the day are part of larger tasks that involve multiple steps and several people in your organization working together. PeopleSoft workflow tools help you build the larger process into your PeopleSoft Human Resources system, automating vital business tasks. You can tie together the individual steps so that PeopleSoft can help coordinate the activities. Because the system has the big picture and knows what you are trying to accomplish, it can automatically start the next step in the workflow, following your organization's business rules.

Using workflow capabilities for administering personnel actions, the PAR status indicates the steps in routing and provides employees, supervisors, and human resources professionals easy access, surveillance, and security in the request management process. While providing options along the way for more time, further information, or return to sender, workflow routes requests by sending personnel actions through a cycle to initiate, request, authorize, and approve requests. Workflow then sends them on to human resources for final processing. The automated workflow process ensures the action request goes through all the reviews your agency needs until it becomes an actual event.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Using PeopleSoft Workflow"

Initiating and Requesting Personnel Actions

Most of the various PAR are created in a similar way. A good representative example is a family/benefits change request, which we'll review in this chapter. In other chapters of this book, we cover other examples of the most highly used requests, such as hiring, awards and bonuses, leave with or without pay, data changes, and termination.

The only significant differences between submitting the various requests are the action and reason codes that you assign and the data that is entered. Most of the requests involve similar steps: You begin on the Data Control page, insert a new row and indicate the desired action, and then tab to another data page in the same group to enter further information, if necessary.

For example, when you initiate a request for changing benefit choices, enter data on the Data Control page and then move to the Personal Data page. For some requests, such as a leave without pay action, however, you enter data *only* on the Data Control page.

You can always view data on other pages, and view summary pages, for decision-support purposes.

See Also

"Hiring Your Workforce"

"USF Processing Personnel Action Requests"

Authorizing and Approving Personnel Actions

Once a request has been submitted, the PeopleSoft workflow system automatically routes the request to designated supervisors and managers for authorizations and approvals.

Supervisors and human resources officials can approve and authorize requests that cover many possible actions involving hire, return to duty, leave with or without pay, suspension, promotion, bonus, award, change in pay, and others. They can also return a request and ask for more data or disapprove it so that it is returned to the originator and its cycle ended.

If you are a designated reviewer, you see the request item in your worklist if you are using the PeopleSoft Navigator display. To authorize or approve a request, click **Work It!,** and the system automatically transfers you to the Authorization or Approval component. You can also access the request from the Administer Workforce menu.

You see the exact same screens that the initiator entered data into, beginning with the Data Control page. However, the information you see is display only and unavailable for entry. Review the data on the Data Control page, including the PAR Remarks and Tracking Data, as well as data on any other page that is relevant to the request. To approve the request, change the PAR Status code on the Data Control page to the appropriate choice, such as ***1st***

Authorized, 2nd Authorized, or ***Approved/Signed.*** The request is then routed to human resources officials for completion and processing.

If you need more information or want to disapprove the request, change the **PAR Status** code to ***Return for More Information*** or ***Disapproved.***

The authorization process works exactly the same way regardless of what the request is, such as data change, award, bonus, or recruitment. Once the authorizing officials have completed their work and entered a new PAR status code, the request goes automatically to the next level in the process.

Human Resources Processing of Personnel Actions

Once a request has been through the initiation and request process and has passed the authorization and approval processes, it goes directly to the human resources office for final processing. A human resources official can submit human resources-specific actions and review and finalize personnel actions that have already been requested, authorized, approved, and are ready to become actual events.

The HR Processing pages are reserved specifically for the human resources officials, so this part of the system has overviews, controls, additional navigational capacity, and maneuverability. Here you can *access* all requests, *view* all data, *finalize* all actions, and *print* all reports.

The HR Processing pages are the same as the Supervisor Request and Authorization pages, only with additional PAR Status options, such as *Processed by HR* and *Return to Sender.*

Canceling or Correcting a Personnel Action Request

Once a request has the PAR status *Processed by HR,* it remains as a record in the system. However, it's possible to correct it by, essentially, creating a new action that references the initial request and gives it a new status. Only human resources officials may perform a correction.

To access a processed request that you want to correct, open a new request in the Data Control page.

Insert a new row by clicking the Insert Row button or pressing F7. The system automatically enters a PAR Status of *COR*. Enter the correct data.

Printing Request for Personnel Action (SF-52) and Notice of Personnel Action (SF-50) Reports

Employees and supervisors can print an action request (SF-52) anytime. Human resources officials can also review a personnel action request report (SF-50) that summarizes various aspects of employee and job request data in printed form.

Printing from the menu Print command or clicking the Print SF-52 request button on the Data Control page produces a printed Request for Personnel Action form (SF-52). The system asks whether to print the SF-52 to a printer or to a file. If you choose Printer, you must specify the printer location.

Before saving and printing this request, ensure that the employee ID is the one you want to appear on the form. An assistant processing an action on an authorized official's behalf, who wants that official's information to appear on the SF-52 and become part of the official audit trail for this action, should select the Override Opr EmplID check box and enter the employee ID and employee record number of the official for the action on the Job Tracking Info page.

The system defaults your printer selection to *LPT1;* override this if needed. If you select File, specify the name of the file to send your output to (including the drive and directory names). Once you enter these parameters, the system runs a Structured Query Report (SQR) to create the SF-52 for you. You can print an SF-50 only when the action has a status of *Processed by HR*.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Appendix: PeopleSoft Application Fundamentals for HRMS Reports," Administer Workforce Reports

Viewing Summary Pages

To view a summary of employee data, use the dynamic inquiry pages and display-only pages that summarize data entered in other pages throughout the system, including Job Summary, Personal Data, Job Data 1 and 2, and Employment Data pages.

See Also

"Viewing Summary Workforce Information"

Generating a Wage and Separation Report

Periodically, Federal agencies are required to generate a Form ES-931 report (Request for Wage and Separation Information). State agencies use the information in this report to determine benefit eligibility for each claimant filing claims for Unemployment Compensation for Federal Employees (UCFE).

The generation of the ES-931 report is a two-part process.

1. Use the Setup Wage and Separation component to enter setup information.

2. Use the Print Wage and Separation component to generate the actual report.

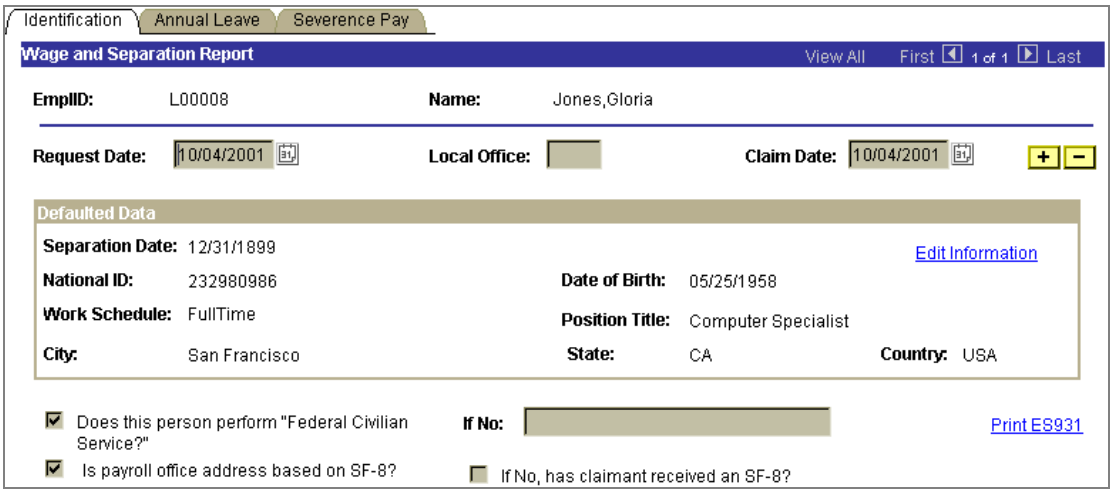
Pages Used to Set Up ES-931 Wage and Separation Report

Page Name	Object Name	Navigation	Usage
Setup Wage and Separation – Identification	GVT_UCFE_PG	Administer Workforce, Administer Workforce (USF), Report, Setup Wage and Separation, Identification	Use to enter employee identification information for the wage and separation report.
Setup Wage and Separation – Annual Leave	GVT_UCFE_PAY_PG	Administer Workforce, Administer Workforce (USF), Report, Setup Wage and Separation, Annual Leave	Use to enter annual leave information for the wage and separation report.
Setup Wage and Separation – Severance Pay	GVT_UCFE_SEV_PG	Administer Workforce, Administer Workforce (USF), Report, Setup Wage and Separation, Severance Pay	Use to enter severance pay information for the wage and separation report.

Note. The pages in the Setup Wage and Separation component will pre-populate the fields for which data is already available and those pre-populated fields will be inaccessible. You will enter data for the remaining fields since data is required in all of the fields.

Entering ES-931 Identification Information

Access the Setup Wage and Separation – Identification page.



Setup Wage and Separation – Identification page

Request Date The date the information was transmitted.

Local Office The numerical ID of the requesting/record holding office.

Claim Date	The effective date of the claim.
Print ES931	Click this link to navigate to the Print Wage and Separation component.

Defaulted Data

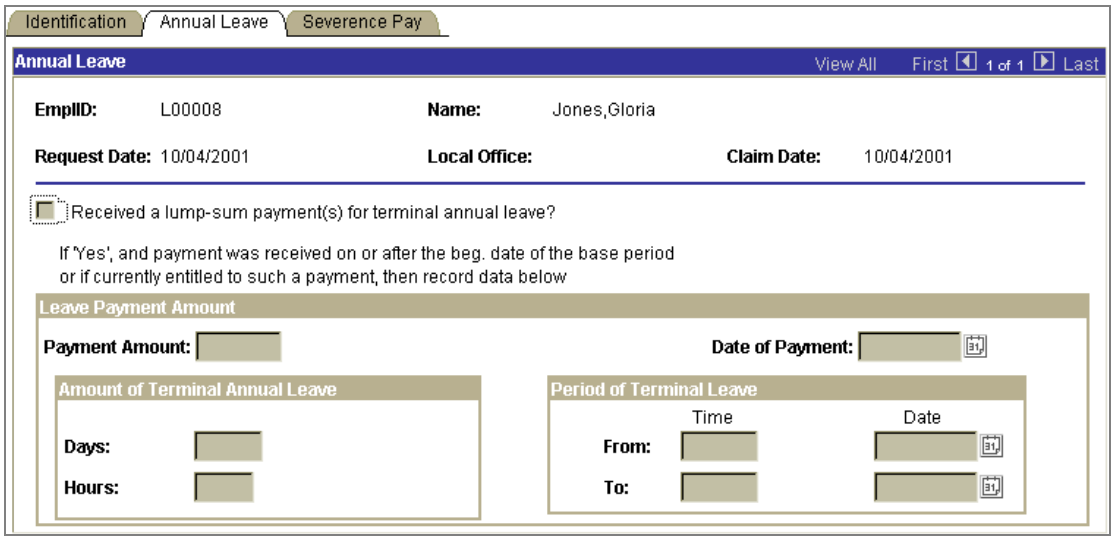
The information in this group pop is pre-populated from existing data, if that data exists. If you need to change a value in a field that was pre-populated, you can click on the **Edit Information** link to make the fields accessible for edit.

If the employee performs Federal Civilian Service, select **Does this person perform "Federal Civilian Service?"**. If the employee does not perform Federal Civilian Service, enter an explanation in the **If "No"** field.

If the payroll office is based on an SF-8, select **Is payroll office address based on SF-8?**. If the payroll office is not based on an SF-8, select **If 'No,' has claimant received an SF-8?** if the claimant has received an SF-8.

Entering ES-931 Annual Leave Information

Access the Setup Wage and Separation – Annual Leave page.

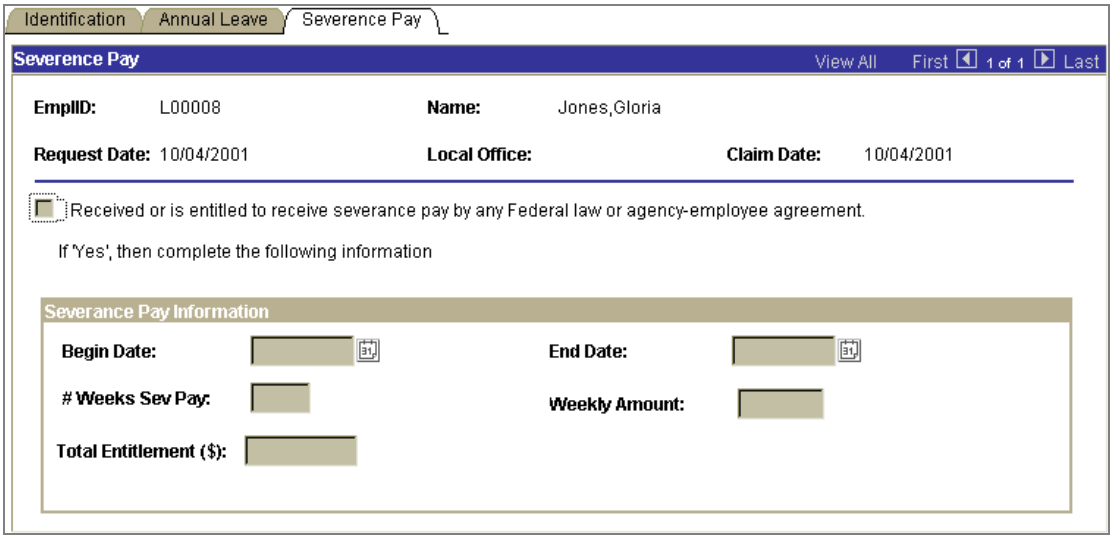


Setup Wage and Separation – Annual Leave page

If the employee received a lump-sum payment for terminal annual leave, select **Received a lump-sun payment(s) for terminal annual leave?**. If selected, and the payment was received on or after the beginning date of the base period, or if the employee is currently entitled to such a payment, enter the related data in the group box.

Entering ES-931 Severance Pay Information

Access the Setup Wage and Separation – Severance Pay page.



Setup Wage and Separation – Severance Pay page

If the employee has received or is entitled to receive severance pay, select **Received or is entitled to receive severance pay by an Federal law or agency-employee agreement.** If selected, enter the related data in the group box.

Generating the ES-931 Report

Once you have completed the necessary setup using the Setup Wage and Separation component, you can generate the ES-931 by accessing the Print Wage and Separation run control page.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Appendix: PeopleSoft Application Fundamentals for HRMS Reports," Administer Workforce Reports

CHAPTER 15

(USF) Processing Personnel Action Requests

In this chapter, we provide an overview of personnel action requests (PARs) and describe how to perform common personnel actions.

Note. PeopleSoft delivers a database providing a sample setup of PAR data. All discussions, overviews, and examples in this book are based on the sample setup. Your agency may choose a similar setup or vary the processes to reflect its own system and operational procedures.

Understanding Personnel Action Requests

An employee's history with an agency usually involves many job changes, such as promotions, leaves of absence, layoffs, retirement, pay rate changes, awards, and so on. To maintain both current records and a complete history of employee job data, your employees, supervisors, and human resources officials will regularly submit PARs for these changes in PeopleSoft Human Resources. (Before requesting personnel actions, verify that you've selected the Multiple Jobs Allowed check box on the Installation Table - Product Specific page.)

Note. The information you need to maintain your employees' career histories is the same type of information you enter to hire employees. Use the same pages for both. We discuss these pages in "Hiring Employees."

Requests for updates you want to make to employee job data begin in the Use menu, where the system prompts you for an employee ID. Depending on whether you are an employee requesting a change for yourself, a supervisor requesting a change on behalf of someone in your department, or a human resources official, choose Employee Request, Supervisor Request, or HR Processing, and go to Data Control. On the Data Control page, begin the request for a new action. From here, go to other pages to enter additional information for the personnel action that you're requesting.

The differences between employee, supervisor, and human resources requests are the types of requests available and the workflow routing of the requests after being submitted. Human resources officials may request any of the actions.

Following is a list showing a sample setup of the pages employees and supervisors can use to enter requests and where those requests can be routed.

Request Type	*Page*	*Submitted By*	*Routed To*
Accounting information	Data Control Compensation Data	Supervisors	Authorization
Agency transfer	Data Control Job Data	Supervisors	Authorization
Agency/sub-agency	Data Control Job Data	Supervisors	Authorization
Appointment/expiration data	Data Control Employee Data 1	Supervisors	Authorization
Awards	Data Control Award Data	Supervisors	Authorization
Benefits/retirement	Data Control Job Data	Supervisors	Authorization
Department reassignment	Data Control Job Data	Supervisors	Authorization
Departmental hierarchy (view only)	Data Control Job Data	Supervisors	Authorization
Draft status	Data Control Personal Data	Employees/supervisors	HR department
Earnings	Data Control Compensation Data	Supervisors	Authorization
Employee type	Data Control Position Data	Supervisors	Authorization
Expected pay (view only)	Data Control Compensation Data	Supervisors	Authorization
FLSA status	Data Control Position Data	Supervisors	Authorization
Holiday schedule	Data Control Position Data	Supervisors	Authorization
Job code #	Data Control Job Data	Supervisors	Authorization
LEO position	Data Control Position Data	Supervisors	Authorization
Locality/LEO adjustment	Data Control Compensation Data	Supervisors	Authorization
Location	Data Control Job Data	Supervisors	Authorization

Request Type	*Page*	*Submitted By*	*Routed To*
Marital status	Data Control Personal Data	Employees/supervisors	HR department
Medicare entitlement date	Data Control Personal Data	Employees/supervisors	Authorization
Military status	Data Control Personal Data	Employees/supervisors	Authorization
Name/address/birth/phone	Data Control Personal Data	Employees/supervisors	Authorization
Nonpay data	Data Control Employee Data 2	Supervisors	Authorization
Other pay data	Data Control Compensation Data	Supervisors	Authorization
PAR remarks	Data Control Par Remarks	Supervisors	Authorization
Pay group/frequency	Data Control Position Data	Supervisors	Authorization
Pay plan/table/grade/step	Data Control Compensation Data	Supervisors	Authorization
Permanent/RIF/tenure	Data Control Employee Data 2	Supervisors	Authorization
POI	Data Control Position Data	Supervisors	Authorization
Position #	Data Control Job Data	Supervisors	Authorization
Probation dates	Data Control Employee Data 2	Supervisors	Authorization
Quoted pay data	Data Control Compensation Data	Supervisors	Authorization
Reports to position	Data Control Employee Data 2	Supervisors	Authorization
Retained grade	Data Control Employee Data 2	Supervisors	Authorization
Review date	Data Control Employee Data 1	Supervisors	Authorization
Security info	Data Control Employee Data 2	Supervisors	Authorization
Service computation dates	Data Control Employee Data 1	Supervisors	Authorization
Service conversion dates	Data Control Employee Data 1	Supervisors	Authorization

Request Type	Page	Submitted By	Routed To
SF-50/SF-52	Data Control	Supervisors	Prints reports
SF-113 ceiling	Data Control Position Data	Supervisors	Authorization
Shift details	Data Control Position Data	Supervisors	Authorization
Tax location	Data Control Job Data	Supervisors	Authorization
Tracking (job) data	Data Control Tracking Data	Supervisors	Authorization
Union information	Data Control Employee Data 2	Supervisors	Authorization
Veteran's data	Data Control Personal Data	Employees/supervisors	Authorization
Within-grade-increase data	Data Control Employee Data 1	Supervisors	Authorization
Work schedule	Data Control Position Data	Supervisors	Authorization

In this section, we discuss:

- Personnel actions and employee status.
- The importance of effective dates.
- Multiple actions with the same effective date.

See Also

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

Personnel Actions and Employee Status

When you request a personnel action to make changes to employee job data, the employee status often changes. For example, when you select *Retirement,* the employee status changes from *Active* to *Retired.* Similarly, if you terminate an employee due to death, the employee status changes from *Active* to *Deceased.* The employee status is based on either the personnel action, or in a few cases, the reason for the action, such as death. The system sets employee status as follows.

When you select the personnel action	*The system sets the employee status to*
Hire Applicant hire Rehire Concurrent appointment Detail assignment End of detail Terminate detail assignment Return from LWOP Return from disability (LWP) Recall from suspension/furlough Intnl assignment	*Active*
Leave with pay Short-term disability Long-term disability	*Leave of Absence*
Paid leave of absence Short-term disability with pay Long-term disability with pay	*Leave with Pay*
Retirement with pay	*Retired with Pay*
Terminated with benefits Terminated with pay	*Terminated with Pay*
Furlough Suspension	*Suspended*
Retirement	*Retired*
Intl assignment completion Termination	*Terminated*
Termination (reason of death)	*Deceased*
Pay rate change Change to lower grade Data change Earnings distribution change Job reclassification Position change Probation Completion of probation Promotion Extension of NTE date Award-monetary Award-nonmonetary Bonus Reassignment/conversion Family benefits change	The system sets the employee status to the same status that's in the previous data row. If no previous data row exists, the system sets the status to *Active.*

When an employee status is set to *Active, Leave with Pay, Retired with Pay,* or *Terminated with Pay,* the system triggers payroll processing in PeopleSoft Payroll and PeopleSoft Payroll Interface.

If your agency uses PeopleSoft Payroll for North America, payroll paysheets aren't generated for employees whose status is *Retired* or *Terminated.* You may need to pay employees for a partial pay period or for a time after they leave the agency, however, so use either the personnel action *Retired with Pay* or *Terminated with Pay* to ensure that this occurs.

A change in employee status can affect both the PeopleSoft benefits modules and PeopleSoft Payroll processing. Specifically for benefits, you may need to suspend coverage during a leave of absence or a suspension. In addition, a promotion or a job reclassification might affect an employee's benefit coverage.

Changes in an employee's status can also impact pension administration.

See Also

PeopleSoft Human Resources PeopleBook: Base Benefits, "Setting Up Benefit Support Tables"

PeopleSoft Payroll for North America PeopleBook, Introducing PeopleSoft Payroll for North America

Importance of Effective Dates

You usually update employee job data in PeopleSoft Human Resources for U.S. Federal Government by adding effective-dated data rows to the employee records. Insert a new row on the Data Control page. When you do this, the system copies the contents of the previous row into the new row so that you don't have to retype the information that stays the same. (So before you insert a new row, ensure that you're on the data row that you want to copy.) The only new information you see is the effective date, which defaults to the system date, usually today's date, which you can change if necessary.

If you want to work on the Employment Data pages, for example, first insert a new data row on the Data Control page, and then move to the appropriate page in the Employment Data group to enter changes.

Effective dates enable you to maintain a complete chronological history of all your data and tables, whether you changed them two years ago or want them to go into effect in two months. With all this information at your fingertips, you can roll back your system to a particular time to analyze position data or employee records. Or you can roll forward and set up tables and data before they take effect.

The system also uses effective dates to compare pages and tables to ensure that the prompt tables list only the data that is valid as of the effective date of the page where you are working. For example, let's say you create a new department code with an effective date of May 1, 1997. If, on the Job Data pages, you enter a new data row for an employee or update an existing row that has an effective date *before* May 1, 1997, then when you select a department, you won't see the new code as a valid choice because it isn't in effect yet.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "(USF) Setting Up Human Resources Management Tables" and "(USF) Setting Up the Work-in-Progress Management System

Multiple Actions With the Same Effective Date

On occasion, you may need to enter more than one personnel action that takes effect on the same day. Entering two actions with the same effective date is particularly common when you need to track annual pay adjustments and career promotions that take effect on the same day. Use effective sequence numbers to combine multiple actions and specify which one to process first. On the Data Control page, enter an actual effective date and assign the action, and the system automatically assigns a transaction number/sequence for each personnel action: The first on that date as *1/1* and the second as *2/1*.

For example, an employee received a pay rate change and a promotion on the same day. As a result of this pay rate change, that employee's salary was raised by about 2.5 percent. And a promotion from a GS-07 position to a GS-09 position produced an additional 7.9 percent increase in salary.

Note. The sequence number for a request is always *1* unless you are canceling or correcting a request that has already been completed and processed. In this case, the system would assign a sequence number of *2* for that action.

To enter multiple personnel actions with the same effective date:

1. Open the Data Control page for the employee whose data you're requesting to update.
2. For the first personnel action, insert a new data row.
3. Enter a new actual effective date.

   Because it is the first action processed for this actual effective date, the Transaction#/Seq # field is *1/1*.
4. Enter any other information required to implement the action, either here or in other pages in the Data component.
5. Change the PAR Status on the Data Control page to *Requested* so that you can continue on to enter the next action.
6. To enter the second action, such as *Promoted,* insert another data row.
7. Enter the same actual effective date as the first action.

   The system enters a Transaction#/Seq of *2/1*.
8. Continue the same steps required for the first action, entering a new action each time.

Employee Data Security Considerations

When you reassign employees from one department to another using a data row containing an effective-date sequence number, the system currently allows operators with security access to the old or new department to have access to all the employee data. PeopleSoft delivers the system this way because implementing security in system views specific to the function Max (effseq) on PS_JOB would adversely affect online response time.

For example, when you reassign an employee from department one to department two and give the employee a promotion on the same day, because an effective-date sequence number is in the reassignment data row, operators with access to either department one or two have access to the employee data.

If you want to modify the system to prevent this, change the security views for the PeopleSoft applications you use. Bear in mind, however, that making the change affects system performance.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Administering PeopleSoft Security

Performing Common Personnel Actions

In this section, we discuss the following federal personnel actions:

- Entering promotional information.
- Requesting departmental reassignments.
- Requesting a leave of absence.
- Entering terminations and retirement requests.
- Requesting a supplemental or correction individual retirement record.
- Requesting terminations due to death.
- Requesting to rehire an employee.
- Granting performance awards.

Entering Promotional Information

When an employee changes pay grades or moves to a new job, salary changes are typically part of that personnel action.

To enter promotional information:

1. Insert a new data row on the Supervisor Request - Data Control page, and complete all fields.

2. When you are ready to submit the request, ensure that the PAR Status is *REQ.*

   The workflow system then picks up this information and routes it through the approval process. After that, you can still change, withdraw, or deny the information up until the point that the action has been finalized and has a status of *Processed.* To correct or cancel the request after it's been completed and has a status of *HR Processed,* go to the Cancellation or Correction pages.

   The information you change on the Data Control page and other pages varies according to the data for the former job and the new job. You will most likely select a new job code or a new position number by moving to the Job Data page. But all of the other entries on this page could also conceivably change in the event of a promotion.

   Again, the information you change on the Job Data page may vary, but you will most likely select a new pay plan, table, grade, or step and enter (or generate) a new base pay.

3. Once you've completed all the changes caused by the promotion, if necessary, move to other pages to enter relevant information.

   For example, move to the Personal Data page to enter new business phone numbers. Or move to the Position Data page to change the pay group or employee type, or to enter other relevant position details.

4. Change the position as necessary on the Supervisor Request - Job Data page.

5. Select a pay rate determinant on the Supervisor Request - Compensation Data page.

6. Set the options in the Within-Grade Increase Data group box on the Supervisor Request - Employment 1 page as follows:

Actions	***Impact***
Promotion (nature of action 702) WIGI (NOA 893) GM WIGI (NOA 891)	Sets the WIGI status to *waiting.* Sets the WIGI due date to the pay begin date, which is the first pay begin date after the employee has satisfied his or her next increase waiting period. Sets the LEI date and last increase date to the effective date of the action.

Actions	*Impact*
Quality step increase (QSI) (NOA 892)	Sets the WIGI status to *waiting.* Sets the WIGI due date to the pay begin date, which is the first pay begin date after the employee has satisfied his or her next increase waiting period. The WIGI due date is based on the last equivalent increase date, not the effective date of the action. Sets the last increase date to the effective date of the action. (Has no effect on the LEI Date.)
Change to lower grade (NOA 713)	Issues a warning message "Warning -- Change to Lower Grade Personnel Action may have an impact on WGI Due Date -- Adjust accordingly." Always review current or future-dated records and make manual adjustments that may be required for any change to lower grade action.
Temporary promotion (NOA 703)	Sets the WIGI status to *NA.* Sets the WIGI due date to *Blank.*

Requesting Departmental Reassignments

Note. The description given here is for reassigning employees among departments. Agency-to-agency transfers are processed as hires and terminations.

To enter a reassignment request when a person is assigned to a new department without changing job codes:

1. Use the Data Control page to enter reassignment requests.

   Reassignments usually imply that there is no change in pay grade or compensation.

2. If this action is to occur on the same day as another action, insert an Action# in the Action#/Sequence field.

3. Enter the Action of *Reassignment/Conversion.*

4. Enter the Reason Code, such as *Employee Reques*t or *Manager Request*.

5. Complete all other necessary changes, such as NOA Code and Authority (1) and (2).

6. Move to the Job page to enter additional changes for the employee being reassigned.

   Change the position number, job code, agency, and any other details that will change with the employee reassignment. When you select a new department for the employee, the

system automatically enters a new location and tax location if you've associated a location with the department in the Department table.

7. Move to other pages to enter any other employment or job information applicable to the reassignment.

   For example, you may need to go to the Personal Data page to enter a new phone number. On the Personal Data page, click the Personal Phone Numbers button, and on the Personal Phone Numbers page, enter a new business phone number. On Employment Data 2, change the supervisor ID to the manager of the new department. Move to other pages, such as the Position Data page to change the pay group, employee type, or other relevant position details.

Security Considerations

PeopleSoft Human Resources enables operators to assign employees into departments that they can't access for updates. If you want to prevent an user from reassigning an employee into a department for which they don't have access, PeopleSoft Human Resources contains a view (DEPT_TBL_ACCESS) that displays only those department IDs that users can access based on their user security profiles.

If you choose to use this view, you must create a class of operators who have access to all departments so that they can perform reassignments.

See Also

"Hiring Your Workforce"

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Administering PeopleSoft Security

Requesting Leave of Absence

At some point in their careers, many employees take leaves of absence. For example, when an employee or an employee's wife has a baby, the new parent may request a maternity or paternity leave.

To enter a leave of absence:

1. Access the Data Control page to submit a request for the employee who is temporarily leaving the agency.

2. Access the Non Pay Data page to enter leave of absence data for an employee.

   In the Last Date Worked field, enter the last date the employee worked. When you process the PAR to return the employee to pay status, you must update the other fields (SCD Hours, Probation Hours, and Career Tenure Hours), as appropriate.

3. When an employee returned from leave, return to the Data Control page to change that employee's status to *active*.

a. In the Action field, select *RFL* (return from leave without pay).

b. In the Reason Code field, select *RFL* (return from leave).

c. In the PAR Status field, select *Requested* or leave it as *Initiated* in case the return date changes for any reason.

d. Move to any other pages to make needed changes.

See Also

PeopleTools PeopleBook: Introduction to PeopleSoft Reporting

Entering Terminations and Retirement Requests

When employees leave the agency permanently, you render their records and their statuses inactive by registering them as *Terminated* or *Retired.* The processes for entering terminations and retirements are almost identical; the primary difference is the action you select on the Data Control page.

To enter termination and retirement requests:

1. Request a termination for an employee who has left the agency using the Data Control page.

   The Actual Effective Date field defaults to the system date, usually today's date, which you can change if necessary.

   Normally, the system uses the effective date to represent the *beginning* of an action; however, when an employee terminates or retires, the system treats the effective date you enter as the close of business of the day of the termination.

   For example, if an employee's last day of employment is September 1, the effective date is September 1 because the termination is effective at the close of business that day.

2. In the Action field, select one of the following: *Termination, Terminated with Pay, Terminated with Benefits,* or *Retirement.* Then select a reason code for the departure, if applicable.

   Depending on the action you selected, the system changes the employee status from *Active* to *Terminated, Terminated with Benefits or Pay,* or *Retired.*

3. If the employee is suitable for rehire, save this page.

   When you request a termination or retirement, the system generates an individual retirement record (IRR) control record for this employee.

Note. The IRR process is used by agencies using PeopleSoft Payroll. Payroll detail earnings and deductions for the fiscal history are used in the IRR process.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Using PeopleSoft Workflow," Using Workflow to Terminate Employees

PeopleSoft Payroll for North America PeopleBook, "USF Processing of Individual Retirement Records (IRR)," Overview of the IRR Process

Requesting a Supplemental or Correction Individual Retirement Record

After you process an employee's IRR, you may find that you need to supplement or make corrections to that IRR. This requires that you create another PAR using the Administer Workforce, Administer Workforce (USF), Use, Supplemental to IRR or Correction to IRR menu.

When you create the new PAR, the system creates an IRR control record with an IRR type of *C (correction)* or *S (supplemental).*

See Also

PeopleSoft Payroll for North America PeopleBook, "USF Processing of Individual Retirement Records (IRR)," Overview of the IRR Process

Requesting Terminations Due to Death

To request termination due to death:

1. Open the Data Control page for the deceased employee.
2. In the Action field, indicate that the employee is *terminated*
3. In the Reason Code field, select *Death* as the reason for termination.

   The system automatically changes the Employee Status field from *Active* to *Deceased.*

Requesting to Rehire an Employee

When you request to hire an employee who worked for your agency in the past, enter a *Rehire* action. Information on a rehired employee is already in PeopleSoft Human Resources unless the employee data was deleted or archived. If employee records aren't in the system, follow the new hire process described in "Hiring Your Workforce."

You can rehire only employees whose employee status is *Terminated, Terminated with Pay, Terminated with Benefits, Retired,* or *Retired with Pay.* If you rehire an employee whose records already exist in the system, you may want to ensure that the personal, employment, and job data for that person is current.

If you want to rehire an employee whose previous job was in a department (organizational entity) for which you don't have security access, give at least one user performing rehires security access to all departments.

To request to rehire an employee into the system:

1. Open the Data Control page for the employee and request a rehire.
2. Move to the other employee data pages to enter additional information.

Granting Performance Awards

Recognizing and rewarding employee performance is a critical component of attracting and keeping top talent. PeopleSoft Human Resources handles the complexity of this human resource area by making it easy to establish, record, track, and grant employee awards and bonuses.

Begin the process to grant an award by submitting a request to issue a bonus or award, and the data is automatically sent through the approval process, tracked, approved, recorded, and issued to the employee.

To issue an award:

1. Set up the Award Action Data page to define monetary and nonmonetary award types.
2. Request an award or bonus for your employee on the Data Control page.

   Submit your request the same as you would for other personnel actions.
3. Define the award set up using the Supervisor Request - Data Control page.

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies, "Setting Up Competencies and Accomplishments"

CHAPTER 16

(USF) Processing Automatic Actions for Probation, Tenure, and Within-Grade Increases

This chapter provides an overview of processing automatic actions and discusses how to:

- Perform automatic actions.
- Administer probation termination automatic actions.
- Administer tenure conversion automatic actions.
- Administer within-grade increases (WGIs).

Overview of Processing Automatic Actions

Your agency's human resources personnel have many tasks to oversee: recruiting new employees, making hiring decisions, administering reviews, and tracking changes in employees' personal data, among others. Unfortunately, much of their time can be spent processing routine, tedious data. PeopleSoft HRMS for U.S. Federal Government automates some of these routine tasks, leaving your professionals free to spend time on other projects that require their professional insight and skills.

The PeopleSoft Human Resources Administer Workforce module offers an Automatic Actions process to administer these routine tasks:

- Probation termination.
- Tenure conversion.
- Within-grade increases (WGIs).

If you activate workflow, PeopleSoft Human Resources alerts you of upcoming waiting period terminations or step increases and then automatically updates employee records without operator intervention. After you assign supervisors to review automatic action notices, you won't forget these important dates.

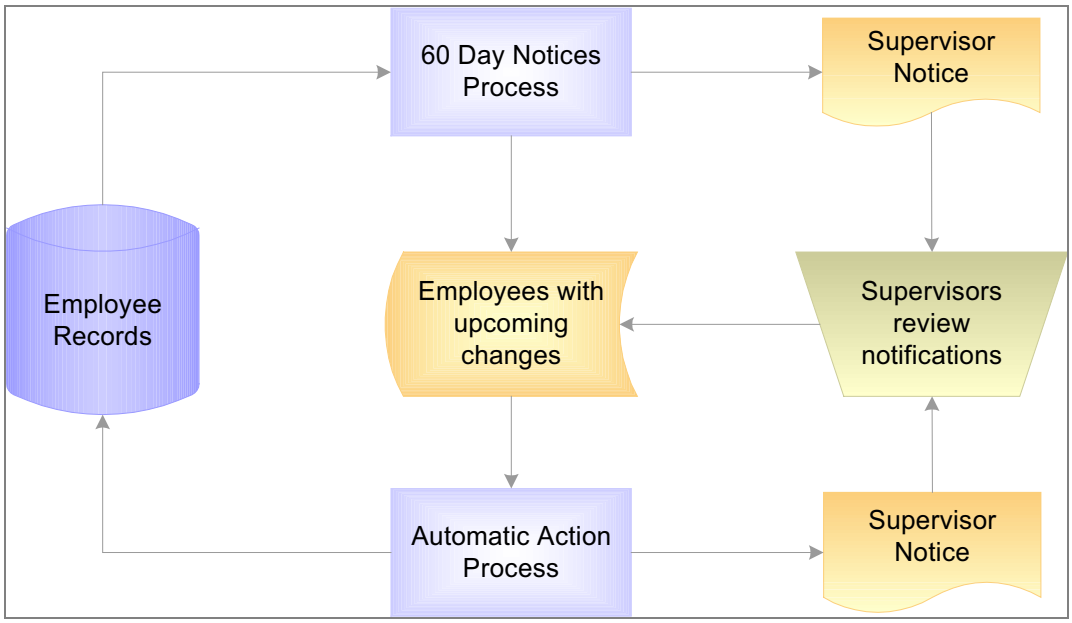
The procedure is identical for all three automatic actions:

1. Run a process to identify employees with upcoming probation terminations, tenure conversions, or within-grade increases in the next 60 days. The system creates online

notifications of upcoming changes and sends them to the worklist of designated supervisors.

2. Review online notifications and make any necessary changes to employee records. Unless you change status or date fields in the employee's records to stop the update from occurring, the respective process updates the employee's records.

3. Run a process on the specified date to change employee records. This process also creates notices and sends them to supervisor worklists.



Processing automatic actions

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Using PeopleSoft Workflow"

Before You Begin

For the Automatic Actions process to work as described, you must first activate workflow and set up supervisors in the workflow process. Consult your system administrator for information.

You should designate one or more employees, perhaps from your human resources or payroll office, to administer the Automatic Actions processes. As delivered, the system sends supervisor notifications to the employee's supervisor's worklist based on WGI, tenure, and probation information already in your system. This information, most of which you entered during the hire process, initiates the automatic action processes. Run the Automatic Action processes regularly, as determined by your organization's needs. If necessary, manually change employee records to process special cases.

Before implementing Automatic Actions, decide how often your agency should run each process. For example, within-grade increases generally take effect on the first day of a pay period, so you might choose to process step increases only once per pay period. On the other hand, if supervisors review notices every Thursday morning, you should run 60-day notification processes weekly. Some agencies run the notification processes nightly to accommodate multiple supervisors and to allow for maximum time to verify upcoming employee record changes.

Note. Before you can administer automatic actions for your employees, you must have already entered them into the system using the Hire, Concurrent Hire, Add Nonemployee, or Applicant Hire components in Administer Workforce (USF).

Performing Automatic Actions

The following table provides an overview of the menus and pages used for each automatic action process. However, this table does not include manual setup and verification. Run all of these processes from the Administer Workforce, Administer Workforce (USF) menu.

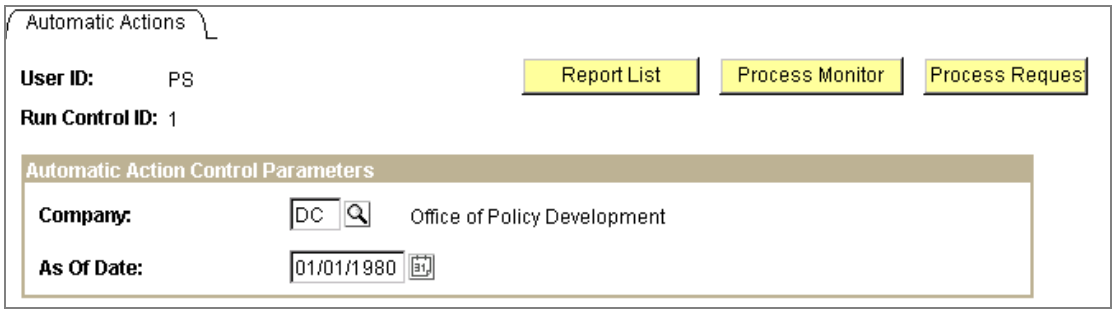
Step	*Function*	*Navigation*	*In PeopleSoft Process Scheduler, Select*	*Process Type and Name*
1	Identify employees, create notices, and send notices to supervisor worklists.	Process, Automatic Actions	60 Day Probation Term Notices	Application Engine FGHR003A
			Or 60 Day Tenure Notices	Application Engine FGHR004A
			Or 60 Day WGI Notices	Application Engine FGHR002A
2	Update employee records and send notices to supervisor worklists.	Process, Automatic Actions	Process Probation Terminations	Application Engine FGHR003B
			Or Process Tenure Conversions	Application Engine FGHR004B
		Or Process, Within Grade Incr. Auto Actn	Load with Grade Increases	Application Engine FGHR002B

Pages Used to Perform Automatic Actions

Page Name	Object Name	Navigation	Usage
Automatic Actions	RUNCTL_AUTO_ACTNS	Administer Workforce, Administer Workforce (USF), Process, Automatic Actions, Automatic Actions	Specify automatic action run control parameters for the probation termination and tenure conversion processes.
WGI Action	RUN_FGHR002B	Administer Workforce, Administer Workforce (USF), Process, Within Grade Incr. Auto Actn	Specify automatic action run control parameters for processing WGIs.
Gvt Prob End Note (Government probation end notice)	GVT_PROB_END_NOTE	Administer Workforce, Automatic Actions (USF), Use, Prob Term Supv Rev	View impending probationary period termination notifications online.
Gvt Ten End Notice (Government tenure end notice)	GVT_TEN_END_NOTICE	Administer Workforce, Automatic Actions (USF), Use, Tenure Conv Notice	View 60-day tenure notifications online.
Gvt WGI Notice (Government within-grade increase notice)	GVT_WGI_NOTICE	Administer Workforce, Automatic Actions (USF), Use, WGI Notice	View impending within-grade increases notifications online.

Processing Automatic Actions

Access the Automatic Actions page.



Automatic Actions page

Company	Enter the company for which you would like to identify employees and create notifications.
As Of Date	The as of date is set by default to the system date. The process identifies all rows with a probation date within 60 days in the future from this date.
Run	Click to run this request. PeopleSoft Process Scheduler runs the Automatic Actions process at user-defined intervals.

See Also

PeopleTools PeopleBook: Process Scheduler

Administering Probation Termination Automatic Actions

When you first hire an employee, your agency usually imposes a probation period; most new regular federal employees have one-year probation periods. Supervisory or managerial employees and Senior Executive Service (SES) employees often have different probation periods, which you track separately.

The Probation Termination automatic action, like other automatic actions, identifies employees who will reach their probation termination date within 60 days. After you have activated workflow, the system sends messages to employee supervisors who are designated to process automatic actions. After the supervisors approve the probation termination, you run the process to perform the actual changes to employee records, blanking out employee probation dates, indicating that they have met the probation period. Finally, you can send notices of completed probation periods to the designated supervisors' worklists.

Running the Probation Termination Automatic Action

To run the probation termination automatic action:

1. Verify all of the data required for automatic probation termination processing.

Verify the employee's probation waiting period (Probation Date) and the position to which the employee reports (Reports To Position) on the Employment 2 page, accessed from the HR Processing menu. If the employee has multiple data rows, verify only the current row.

Verify accumulated non-pay hours that affect the employee's probation termination date on the Non Pay Data page.

2. Run the 60-Day Probation Termination Notices process from the Automatic Actions page.

   During this process, the system performs the following functions:

- Identifies employees who have a probation termination within the next 60 days, and then creates supervisor notifications. After the notices are created, the supervisor has until the probation termination date to request an extension of the probation period. The system processes the probation termination if the supervisor doesn't respond in time.

- Adds a row to the automatic action control table (GVT_AUTO_ACTN), which records the employee ID, employee record number, automatic action type, and automatic action date. The system differentiates among the three probation termination types: standard, supervisor, and SES. This table also indicates whether the notification was sent to the specified worklist, whether the action was processed, and whether notification of the processed action was sent to the specified worklist.

3. Run the Process Probation Terminations process from the Automatic Actions page.

   The automatic action process updates the records of all employees previously identified in the 60-Day Probation Termination Notices process unless the supervisor has extended their probation periods. The probation termination automatic action performs the following functions on the probation termination date:

   - Edits the applicable row in the automatic action control table (GVT_AUTO_ACTN) to indicate that the probation termination was processed. This row was created during the 60-Day Probation Termination Notices process.

   - Clears the probation date on the employee's current Employment Data 2 page.

   - Creates a supervisor notice indicating that the probation termination was processed.

4. View notices of upcoming probation terminations on the Gov Prob End Note page (government probation end notification).

   Supervisors and human resources officials can view 60-day notifications online. After viewing these online messages of impending probationary period termination, they should verify that the employee will fulfill all of your agency's requirements by the specified date. To extend the probation period, the supervisor should request a personnel action to change the probation date on the employee's Employment 2 page. If the employee's probation date isn’t changed, the probation termination will occur on the date indicated.

See Also

“USF Hiring Employees,” Assigning Employees to Positions

Administering the Tenure Conversion Automatic Action

Most of your conditional and career-conditional new hires are subject to tenure conversion waiting periods. If you specify this period when you first hire the employee, the tenure conversion automatic action alerts you of upcoming tenure conversion dates and changes employee records to reflect the tenure conversion.

The Tenure Conversion automatic action, like other automatic actions, identifies employees who will reach their tenure conversion dates within 60 days. After you activate workflow, the system sends messages to the supervisors you have designated to process automatic actions. After the supervisors approve the tenure conversion, you run the process to perform the actual changes to employee records—clearing tenure conversion dates and changing tenure types. Finally, you can send notices of tenure conversions to the designated supervisors' worklists.

Running the Tenure Conversion Automatic Action

To run the tenure conversion automatic action:

1. Verify all of the data required for automatic tenure conversion processing processing.

   a. Verify the employee's service conversion dates, tenure status, and the position to which the employee reports (Reports To Position) on the Employment 2 page, accessed from the HR Processing menu.

   b. Verify accumulated non-pay hours that may affect tenure conversion waiting periods on the Non Pay Data page.

2. Run the 60 Day Tenure Notices process from the Automatic Actions page.

   During this process, the system:

   - Identifies employees who will reach their tenure conversion date within 60 days, and then creates supervisor notifications. After the notices are created, the supervisor has until the tenure conversion date to request an extension of the waiting period. The system processes the tenure conversion if the supervisor doesn't respond.

   - Adds a row to the automatic action control table (GVT_AUTO_ACTN). This table records the Employee ID, Employee Record Number, automatic action type, and automatic action date. The system differentiates between the two types of tenure conversions, career and career-conditional. This row also indicates whether the notification was sent to the specified worklist, whether the action was processed, and whether notification of the processed action was sent to the specified worklist.

3. Run the Process Tenure Conversions process from the Automatic Actions page.

   In this process, the system updates records of employees previously identified in the 60 Day Tenure Notices process, unless the supervisor extended the tenure conversion date. The tenure conversion automatic action performs the following functions on the tenure conversion date:

   - Edits the applicable row in the automatic action control table (GVT_AUTO_ACTN) to indicate that the tenure conversion was processed. This row was created during the 60-Day Tenure Notices process.

   - Inserts an employee data row with updated or deleted tenure conversion dates and changed tenure type.

- Creates a supervisor notice indicating that the tenure conversion was processed. As for the notices of upcoming tenure conversions, you can view these notices in the Administer Workforce, Automatic Actions (USF), Use menu.

4. View notices of upcoming probation terminations on the Tenure Conv Notice page (tenure conversion notification).

   Supervisors and Human Resources officials can view 60-day notifications online. After viewing online messages of impending tenure conversion, they should verify that the employee will fulfill all of your agency's requirements by the specified date. To extend the tenure conversion period, the supervisor should request a personnel action to change the date on the employee's Employment 1 page, as described previously. If they don't change the employee's tenure conversion date, the tenure conversion will occur on the date indicated.

See Also

"USF Hiring Employees," Assigning Employees to Positions

Processing Tenure Conversions

To understand the changes made to employee records during the Tenure Conversion process, let's look at an example of an employee's data rows.

Effective Date	*NOA*	*Conv Begin Date*	*Career Conv Date*	*Career-Cond Conv Date*	*Tenure*
01/01/99= old Career Conv Date	880 = Change in Tenure Status				Permanent
01/01/96= old Career-Cond Conv Date	880 = Change in Tenure Status	01/01/96= current effective date	01/01/99= Conv Begin Date + 3 years		Conditional
01/01/94	101 = Career Conditional Appointment	01/01/94		01/01/96	None

As you can see from the previous table, the system inserts a row with an effective date equivalent to the Career Conversion Date or Career-Conditional Conversion Date and Nature of Action code 880.

For career-conditional conversions, the system performs the following actions on the new row:

- Blanks out the Career-Conditional Conversion Date.

- Changes the Conversion Begin Date to the effective date of the current row.
- Inserts a Career Conversion Date three years in the future. You can change this date if necessary.
- Changes the Tenure type from *None* to *Conditional.*

For career conversions, the system performs these actions on the new row:

- Blanks out the Career Conversion Date.
- Blanks out the Conversion Begin Date.
- Changes the Tenure type from *Conditional* to *Permanent.*

Administering Within-Grade Increases (WGIs)

Keeping track of within-grade increases for all of your agency's employees can be a time-consuming, labor-intensive process. Using workflow, which you activate and set up, PeopleSoft Human Resources automates the entire process, from identifying upcoming step increases to updating employee records after the increase has occurred. You can be sure that all employees who meet minimum performance standards will receive the proper step increase and concurrent pay raise at the end of the step waiting period.

Running the WGI Automatic Action

To process automatic within-grade increases:

1. Verify all of the data required for automatic WGI processing.

To enable the system to run WGI automatic actions, you must first set up required position and employee data. You may have already entered the necessary information when hiring the employee. Now, verify information throughout your PeopleSoft Human Resources system, at both the table level and the employee level. If the employee has multiple data rows, you only need to verify the current row. All of the following conditions must be met for the system to process an automatic within-grade increase:

a. Selected the Pay Plan is Eligible for Auto Within Grade Increase check box on the Pay Plan Table page.

b. Defined pay calendars for the current year plus the next three years on the Pay Calendar Table page.

c. Ensured each step has a Next Step Increment value in the Weeks column on the Salary Step Table page.

d. Set the Overall Review Rating to *Satisfactory* or better within last 15 months on the Employee Appraisal 1 page.

e. Selected a Work Schedule of *Full Time, Baylor Plan,* or *Part Time* on the Position Data page.

f. Set WGI Status to *Waiting* or *Approved* on the Employment 1 page.

g. Ensured that the Reports To Position field contains a valid entry on the Employment 2 page.

h. Verified that the Step isn't the highest in grade on the Compensation Data page.

Note. If you are using Position Management, the Report To Position field on the Employment 2 page is unavailable for data entry. To edit the field, select the Position Override check box on the Position Data page and change the position this employee reports to. You can also identify the Reports To Position on the Position Data 1 page in the Manage Positions (USF) menu. To do this, select Develop Workforce, Manage Positions (USF), Use, Position Data, Position Data 1.

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2. Run the 60 Day WGI Notices process from the Automatic Actions page.

This process identifies employees with a WGI Due Date within the next 60 days and a WGI Status of *Waiting* or *Approved.* The system:

- Adds a row to the automatic action control table (GVT_AUTO_ACTN). This table records the Employee ID, Employee Record Number, automatic action type, and automatic action date. This table also indicates whether the notification was sent to the specified worklist, whether the action was processed, and whether notification of the processed action was sent to the specified worklist.

- Identifies employees who will receive a within-grade increase within 60 days and creates supervisor notifications. After the notices are created, the supervisor has until the WGI due date to deny or postpone the increase. If the supervisor doesn't respond, the system processes the step increase. To prevent the automatic within-grade increase from occurring, the supervisor must change the WGI Status to *Denied, Postponed,* or *N/A* on the current row and insert a new row with the new WGI Due Date and WGI Status of *Waiting* or *Approved.* The system also creates notices for employees who have a condition preventing automatic WGI processing.

- Changes the WGI Status on the employees' current Employment Data 1 pages to *Approved,* if the employees meet all of the WGI criteria.

- Sends upcoming WGI notices to supervisor worklists.

3. Run the Load Within Grade Increases process from the WGI Action page.

In this process, the system:

- Updates records of employees previously identified in the 60-Day WGI Notices process, unless you have denied or postponed their increases.

4. View notices of upcoming WGIs on the WGI Notice page.

After viewing these online messages of impending WGI due dates, they should verify that

the employee will fulfill all of your agency's requirements by the specified date. To prevent the WGI from occurring, you must change the employee's WGI Status to *Denied, Postponed,* or *N/A* on the current Employment 1 page. Also, insert a new row with an updated WGI Due Date and WGI Status of *Waiting.* You can also view notices for employees who do not receive automatic WGIs or for whom you must manually process a WGI.

See Also

PeopleSoft Payroll for North America PeopleBook, "Defining Earnings and Using Earnings Codes," USF Establishing Pay Plans

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Using Pay Calendars," Creating Pay and FLSA Calendars

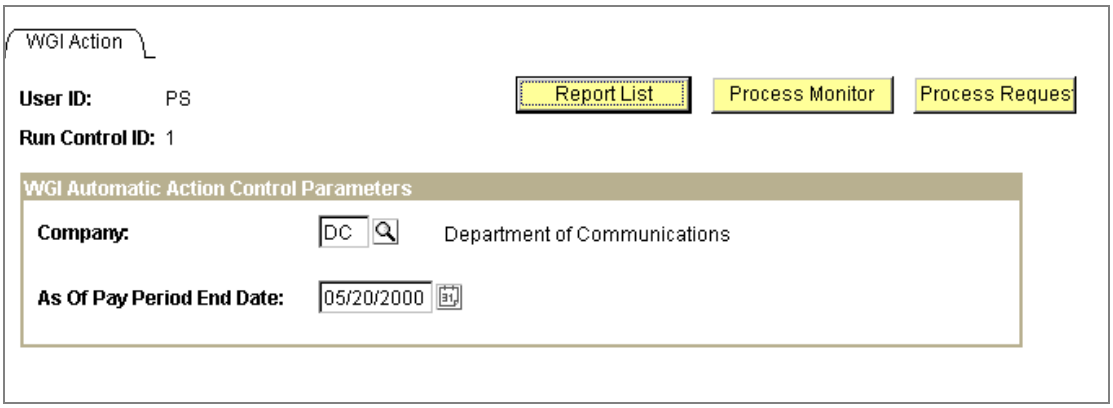
PeopleSoft Human Resources PeopleBook: Plan Salaries, "Defining Salary Plans, Grades and Steps"

PeopleSoft Human Resources PeopleBook: Manage Performance, "Tracking Employee Appraisals"

"USF Hiring Employees"

Running the Load Within Grade Increases Process

Access the WGI Action page.



WGI Action page

Company Enter the company for which you would like to process within-grade increases.

As Of Pay Period End Date This field is set by default to the system date, but you must change it to a valid pay period end date for the pay calendar you have created. The system processes within-grade increases for employees with a WGI due date before this date, usually the begin date for the same pay period.

However, the system also processes WGIs due before this pay period-retroactive WGIs.

Understanding the 60 Day WGI Notices

The system identifies and differentiates among employees who have a WGI Status of *Waiting* or *Approved* and a WGI Due Date up to 60 days in the future, but do not meet all automatic WGI criteria. Employees are classified into four different WGI automatic action types.

Automatic Action Type	*Explanation*
Within Grade Increase	These employees will receive an automatic WGI within 60 days.
Manual WGI	You need to process these employees' WGIs manually. For example, employees with intermittent or seasonal work schedules require manual WGI processing.
Retroactive WGI	These employees have a WGI Status of *Waiting,* but were due a WGI in a previous pay period.
WGI W/O Min. Performance	These employees have an Overall Review Rating below *Satisfactory* or do not have a review within the last fifteen months.

Different supervisor notifications are sent for each of these types. However, the system processes within-grade increases automatically for only the first and third types listed previously, Within Grade Increase and Retroactive WGI.

Understanding the Load Within Grade Increases Process

To understand the within-grade increase automatic action, consider what happens to an employee with this current row:

Effective Date	*NOA*	*Step*	*WGI Due Date*	*WGI Status*	*Last Increase Date*	*LEI Date*
01/01/01	Any	1	05/18/01	Waiting		

In March, the notification process identified this employee's upcoming WGI, after which you sent a notification to the supervisor. The supervisor approved the increase and didn't need to change any data.

On May 18, 2001, the WGI due date, the system processes this employee's within-grade increase. It changes the WGI Status in the old row and inserts a new row as follows:

Effective Date	*NOA*	*Step*	*WGI Due Date*	*WGI Status*	*Last Increase Date*	*LEI Date*
05/18/01=old WGI due date	893 = WGI	2	Pay period begin date after Step 2 waiting period	Waiting	05/18/01=old WGI due date	05/18/01=old WGI due date
01/01/01	Any	1	05/18/01	~~Waiting~~ Created		

As you can see, the system performs six actions during the within-grade increase process:

- Changes the WGI Status to *Created* in the row that was current when the WGI process occurred. If the employee has multiple rows with the same WGI due date, the system changes the status of all the rows to *Created.* Only the system enters a status of *Created.*
- Inserts a new row with Nature of Action Code 893 and Effective Date equal to the old WGI Due Date.
- Increments the Step by one in the new row, and updates step-dependent pay information.
- Calculates the WGI Due Date for the new row. This date corresponds to the beginning of the pay period following the waiting period for the new step.
- Sets the WGI Status on the new row to *Waiting.*
- Sets both the Last Increase Date and LEI Date on the new row to the old WGI Due Date.

WGI increases take effect only at the beginning of a pay period. If the WGI due date is the beginning of a pay period, the pay increase occurs on that date-the employee receives the increased pay for the entire period. However, if the WGI due date falls between the beginning and ending dates of a pay period, the pay increase takes effect at the beginning of the following pay period.

In addition to changing employee records, the system edits the applicable row in the Automatic Action Control table (GVT_AUTO_ACTN) to indicate that the WGI was processed. It also creates a notice indicating that the WGI was processed.

Entering Data That Affects WGI Automatic Actions

Because the automatic WGI process obtains information from many pages, you need to be aware of entering information that might affect some of the data the system uses.

- Creating a PAR for a Change to a Lower Grade. When you create a PAR with Nature of Action code 713, the system updates the WGI due date to reflect the change. However, the change may affect the WGI due date and status in many ways. You need to verify that the information entered is correct for your specific circumstances. To remind you, the system displays a warning message.

- Changing the WGI Due Date. When you change the WGI due date, the system checks that the date you entered is the beginning of a pay period. If it isn't, it issues a warning message.

- Based on the WGI due date you entered, the system suggests the beginning of the pay period in which your date falls and the beginning of the next pay period. You can enter one of these or keep your original date. If you decide to keep the date you've entered, the WGI process still identifies this employee as eligible for a step increase. However, if you enter a WGI due date in the middle of a pay period, the pay increase takes effect only at the beginning of the following pay period.

- Adding historical rows. When you insert a row with an effective date earlier than an automatic WGI that has already occurred, the system assigns a WGI Status of *Waiting*. You probably do not want the system to process this row in an automatic WGI and should change the WGI Status to *N/A*. Depending on the Nature of Action, you might need to check other information, for example Step, on this and subsequent pages.

- Inserting a row with an effective date equivalent to the current WGI Due Date. The system processes the WGI after all other actions with the same effective date. It increments the sequence number of the WGI row it adds.

CHAPTER 17

(USF) Managing Leave

This chapter applies only to the U.S. Federal government and explains how to:

- Administer automatic leave enrollment.
- Set up leave transfer programs.
- Administer leave donations.
- Administer leave recipients.
- View leave transfer data.
- Report on leave transfers.

Administering Automatic Leave Enrollment

This section provides an overview of automatic leave enrollment and tells how to:

- Set up the leave class rules template.
- Set up leave class rules criteria.
- Process automatic leave enrollment.
- Review automatic leave enrollment.
- Manually enter and adjust leave enrollment.

Overview of Automatic Leave Enrollment Administration

Use automatic leave enrollment functionality to automatically enroll an employee in an earnings accrual class with PAR activity or approval to participate in a leave program. The system automatically populates the employee's leave enrollment record with default enrollment values based on the leave class rules you set up. You can manually override the defaults.

Here are the steps in administering automatic leave enrollment:

1. Set up the Leave Class Rules template (one-time setup).

2. Set up Leave Class Rule criteria (one-time setup).
3. Process PAR activity or approval to participate in a leave program.
4. Run the Auto Leave Enrollment process.
5. Review the results of the Auto Leave Enrollment process.
6. Adjust enrollments as necessary.

Before You Begin

Set up Earnings codes and Earnings Accrual Classes.

See Also

PeopleSoft Payroll for North America PeopleBook, "Defining Earnings and Using Earnings Codes

Pages Used to Administer Automatic Leave Enrollment

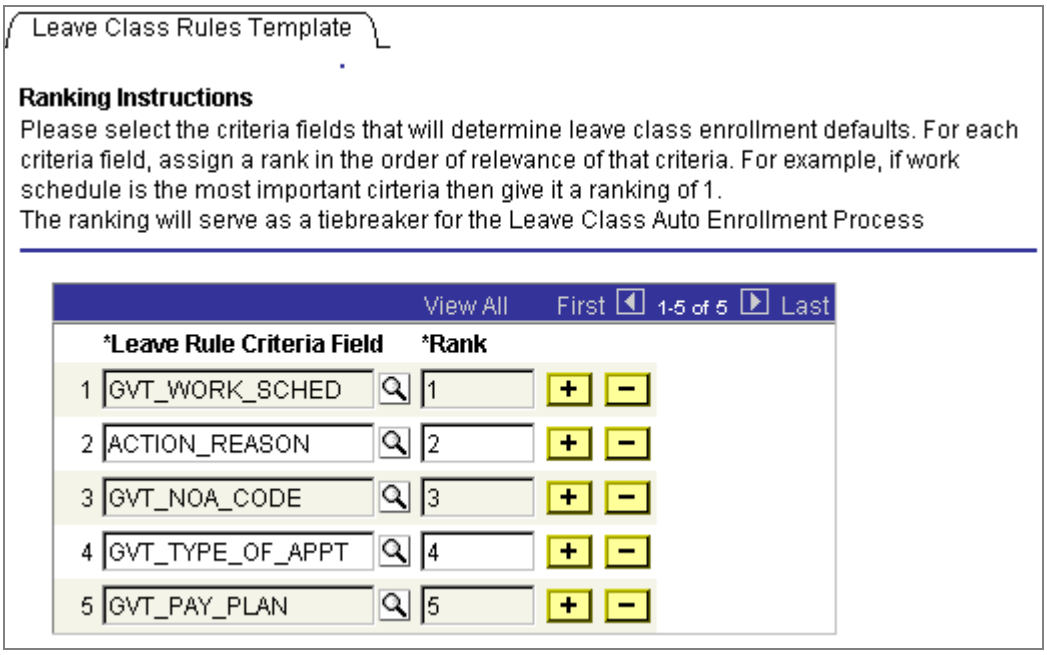
Page Name	*Object Name*	*Navigation*	*Usage*
Leave Class Rules Template	GVT_LVCLSRUL_TMPLT	Administer Workforce, Manage Leave (USF), Setup, Leave Class Rules Template.	Rank five rules criteria for the purpose of breaking ties if an employee qualifies under more than one leave class rule.
Leave Class Rules	GVT_LV_CLS_RULES	Administer Workforce, Manage Leave (USF), Setup, Leave Class Rules Criteria	Define your organization's rules for enrolling or terminating an employee from an earnings (leave) accrual class.
Automatic Leave Enrollment	RUNCTL_FGASOFDT	Administer Workforce, Manage Leave (USF), Process, Leave Class Auto Enrollment	Run the process that automatically enrolls employees in earnings accrual classes based on the PAR or leave program activity and the leave class rules.
Leave Class Auto Entry Audit	GVT_LVCLS_TRGR	Administer Workforce, Manage Leave (USF), Inquire, Auto Leave Enrollment Tracker	View the results of the Automatic Leave Enrollment process.

Page Name	*Object Name*	*Navigation*	*Usage*
Employee Accruals	GVT_ACCR_PLAN	Administer Workforce, Manage Leave (USF), Use, Employee Accruals Enrollment	Adjust employee enrollment in earnings accrual classes if there is a reason to override the automatic enrollment. If your organization does not use the automatic leave enrollment process, use this page to enroll employees in accrual classes.

Setting Up the Leave Class Rules Template

Set up the Leave Class Rules template only once.

Access the Leave Class Rules Template page.



Leave Class Rules Template page

Leave Rule Criteria Field Select the PAR criteria and rank them on this page. These criteria correspond to the PAR Criteria fields on the GVT Leave Class Rules page, where you select values for each criterion. The criteria that you select and rank are the following:

ACTION: action

ACTION_REASON: action/reason.

GVT_NOA_CODE: nature of action code.

GVT_PAY_PLAN: pay plan.

GVT_TYPE_OF_APPT: type of appointment.

GVT_WORK_SCHED: work schedule.

Rank Rank each criterion in order from 1 to 6, with 1 being the highest rank. The single rule where the employee transaction meets the highest-ranking criteria is the rule the system uses as a tiebreaker if an employee qualifies under more than one rule.

Example of Tie Breaking

The following example illustrates how the system uses ranking to resolve situations where the employee qualifies under two different Leave Class Criteria rules.

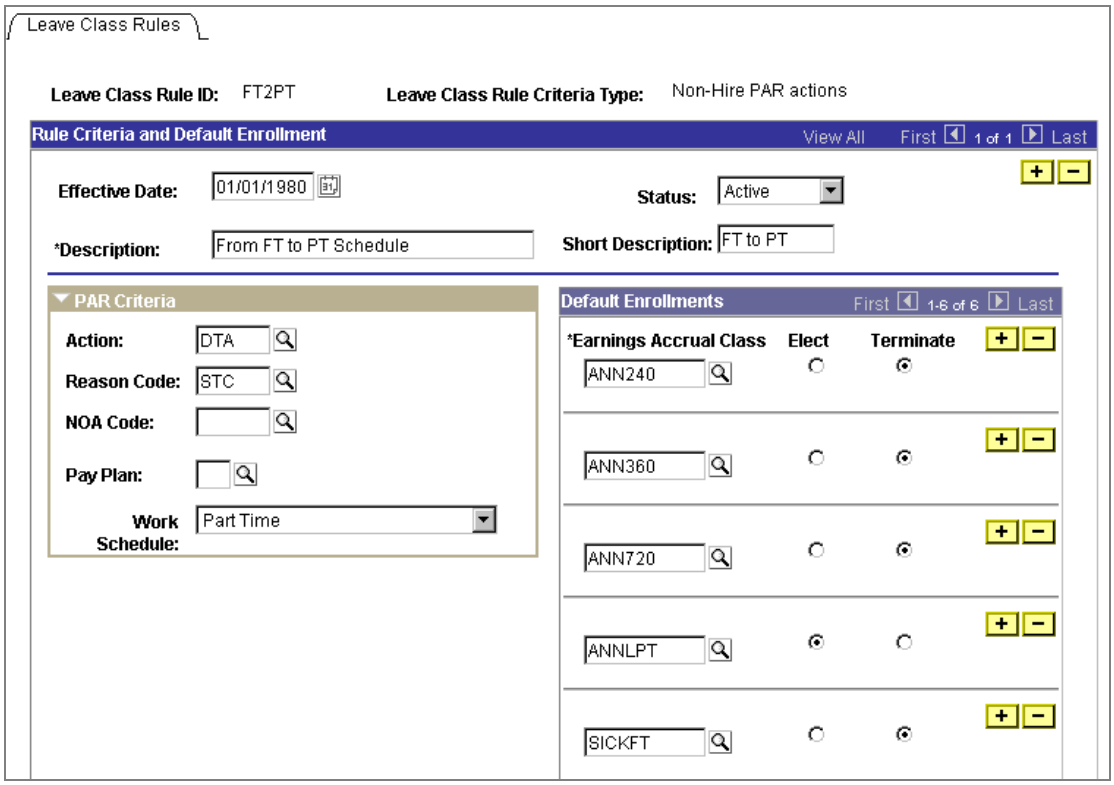
Rule 1 Definitions	*Rule 2 Definitions*
PAR Criteria: Action: HIR Work Schedule: Full-time Pay Plan: GS	**PAR Criteria:** Action: HIR Work Schedule: Full-time NOA code: 170
Default Enrollments: Annual Leave Sick Leave	**Default Enrollments:** Annual Leave Sick Leave Home Leave

The employee meets all criteria for both rules. The Action and Work Schedule criteria are the same in both rules.

- If pay plan is ranked higher than NOA code on the Leave Class Rules template, the system uses the first rule to enroll the employee in leave classes.
- If NOA code is ranked higher than pay plan on the Leave Class Rules template, the system uses the second rule to enroll the employee in leave classes.

Setting Up Leave Class Rule Criteria

Access the Leave Class Rules page.



Leave Class Rules page

Leave Class Rule ID Identify each leave class rule you create.

Leave Class Rule Type Assign a type to each new rule when you first enter the page. This value determines which additional fields are available on the page. Valid values are:

Hire/Rehire: for rules associated with hire or rehire actions.

Non-Hire PAR actions: for rules associated with PAR actions that are not hire or rehire.

Leave Transfer Status: for rules associated with leave bank and transfer processing.

PAR Criteria

Only the criteria you selected and ranked on the Leave Class template appear in this group box. Select a value for a criterion if you want to process leave enrollment based on a designated value for that criterion under this rule. The system processes enrollments based on the value of this field in the employee's PAR transaction.

Default Enrollments

Earnings Accrual Class Select the earnings accrual classes that apply to this rule.

Elect Select if you want to enroll employees in the earnings

	accrual class by this rule's criteria.
Terminate	Select if you want to terminate employees from the earnings accrual class by this rule's criteria.

Leave Transfer

This group box appears only if the leave class rules criteria type is *Leave Transfer Status*.

Leave Transfer Program	If an employee has been approved as a recipient of one of the leave transfer programs, you can define which accruals to enroll or terminate. Select the type of leave transfer program ***Bank, Emergency,*** or ***Voluntary***.

See Also

PeopleSoft Payroll for North America PeopleBook, "Defining Earnings and Using Earnings Codes," USF Defining Earnings Accrual Classes

Administering Leave Recipients

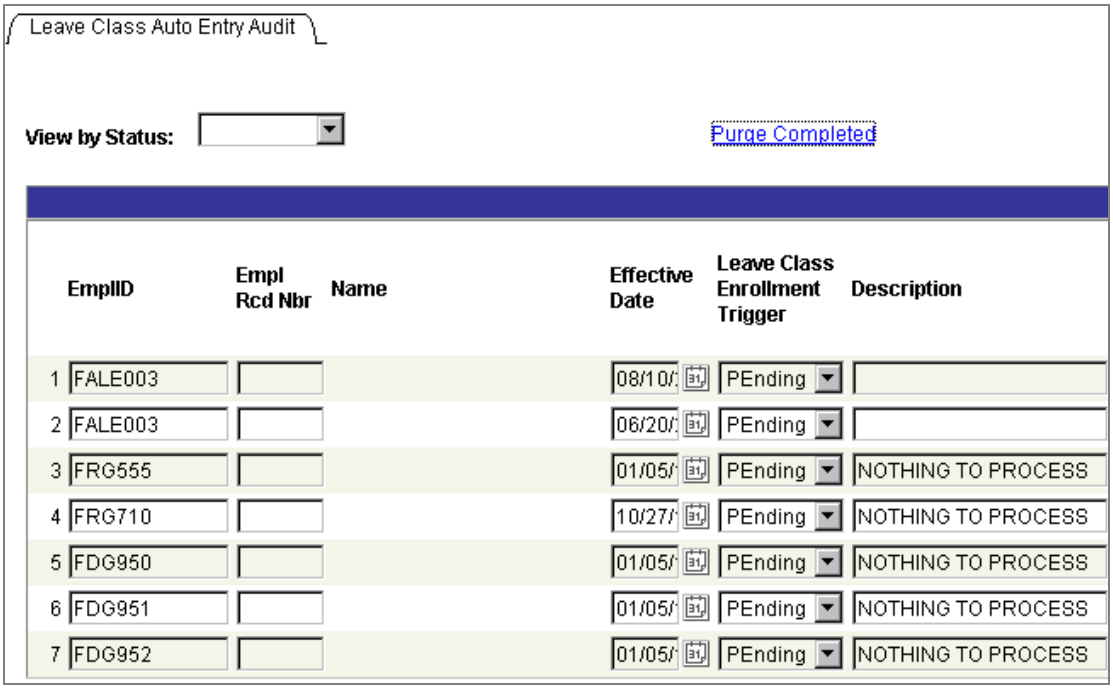
Processing Auto Leave Enrollment

After you set up the Leave Class Rules template and the Leave Class Rule Criteria, you process any hire, PAR transaction, or leave program approval as you normally would through Administer Workforce (USF).

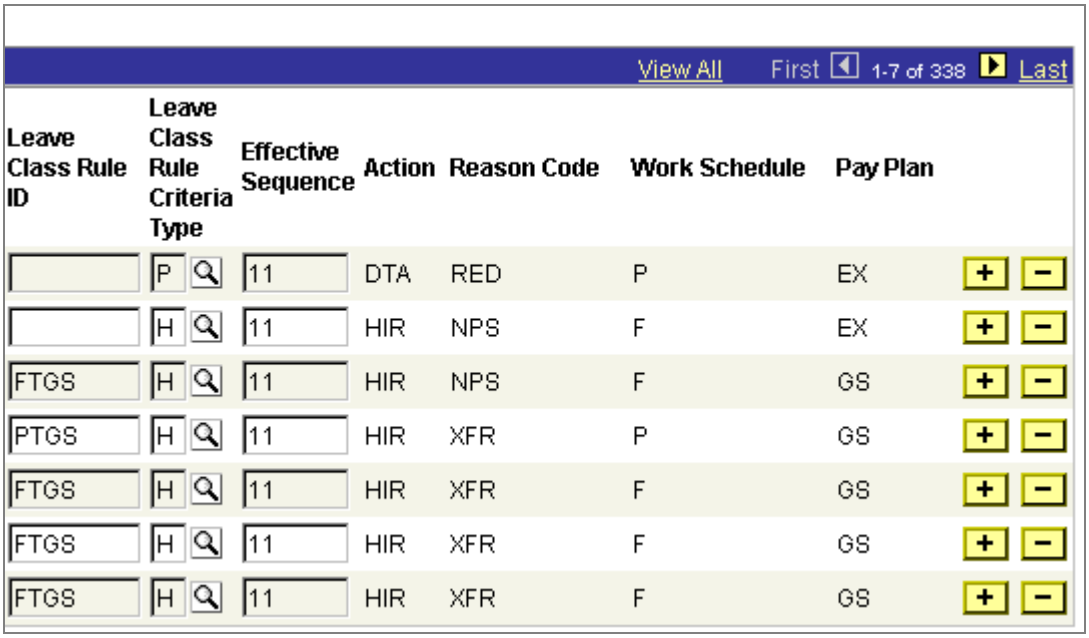
The Automatic Leave Enrollment process compares the PAR transactions and leave program approval against the leave class rule criteria and enrolls employees in the appropriate earnings accrual classes. You can set this process to run automatically or on demand. As Of Date is the run parameter.

Reviewing Auto Leave Enrollment

After the Automatic Leave Enrollment process runs, use the Leave Class Auto Entry Audit page to view the outcome of each transaction that was processed.



Leave Class Auto Entry Audit page (1 of 2)



Leave Class Auto Entry Audit page (2 of 2)

View by Status — You can sort the data by status (Leave Class Enrollment Trigger). Values are: ***Completed, Error,*** or ***Pending.***

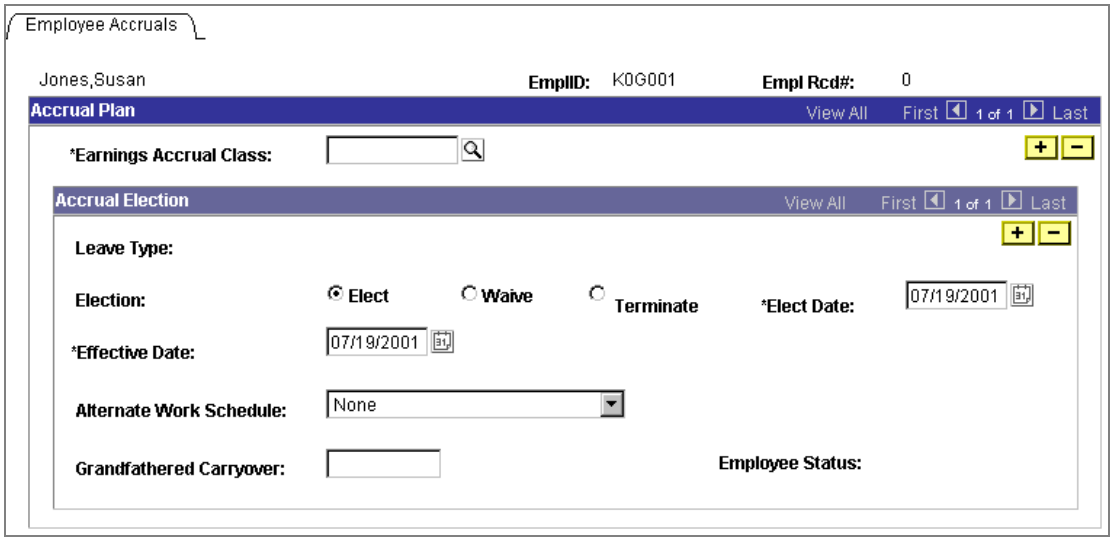
The system records employees on this table with the status of Pending as soon as a PAR action is completed or the employee is approved into a leave program.

The status changes to Completed when the auto enrollment process is complete.

Purge Completed — Click this link to delete all data rows with the status (Leave Class Enrollment Trigger) of *Completed.*

Manually Entering or Adjusting Leave Enrollment

Access the Employee Accruals page.



Employee Accruals page

Accrual Plan

Earnings Accrual Class — Select an earnings accruals class. The drop-down list displays the classes you created on the Earnings Accruals Class table.

Accrual Election

Leave Type — The leave type defaults from the accrual calculation box on the Earnings Accruals – Class Page.

Election — Select the enrollment status.

	Select ***Elect*** to enroll the employee in a class Select ***Waive*** to waive a leave just like a regular benefit. Select ***Terminate*** to end the employee's enrollment in a class.
Elect Date	Enter the date on which the accrual election change occurs.
Effective Date	Select a date to specify when this Accrual Election becomes effective and the employee will be in the new earnings accrual class.
Alternate Work Schedule	The purpose of the alternate work schedule is for those employees on the Credit Leave Accrual. When the employee's work schedule changes, the system creates an additional pay record for them to pay out their current balance.
Grandfathered Carryover	Enter the Grandfathered Carryover here, if applicable. A Grandfathered Carryover is when an employee has a balance greater than the new earnings accrual-ceiling amount. For example, an employee who carried an Annual Leave balance of 360 hours in a previous class can transfer to a new class that has a ceiling of 240 hours. The difference of 120 hours between the new ceiling amount and the current balance of 360 is called the *Grandfathered Carryover.*

See Also

PeopleSoft Payroll for North America PeopleBook, "Defining Earnings and Using Earnings Codes," USF Defining Earnings Accrual Classes.

Overview of Managing Leave Transfers

Each Federal Government agency may establish and administer procedures to permit the voluntary transfer of annual leave between Federal Government employees in a time of crisis. A crisis can be a personal medical emergency or a situation deemed as an emergency of the agency.

There are three types of programs in which employees may donate or receive annual leave hours. These programs have similar but slightly different eligibility or usage rules. Employees may participate in more than one program.

Voluntary Leave Transfer Program (VLTP)	Employees donate and receive annual leave hours directly from each other.
Emergency Leave Transfer Program (ELTP)	Employees donate and receive hours through an agency-managed emergency bank that has been created to deal with a specific emergency.

Leave Bank	Employees donate and receive hours through an agency-managed leave bank.

Setting Up Leave Transfer Programs

To set up leave transfer programs, define the programs and the earnings codes and accrual classes used for processing.

- Set up leave programs on the Leave Program Type Table page.
- Set up earnings codes for leave transfer on the Earnings Table component.
- Set up earnings accrual classes for leave transfer on the Earnings Accruals component.
- Set up Leave Class Rules for leave transfer on the Leave Class Rules page.
- Set up denial reasons on the Denial Code page.

Enter text to be printed on the Leave Denial Notifications report (FGPY031).

Pages Used to Set Up Leave Transfers

Page Name	*Object Name*	*Navigation*	*Usage*
Denial Code	GVT_DENIAL_CD_TBL	Administer Workforce, Manage Leave (USF), Setup, Leave Denial Code Table	Set up denial reasons and specify the text to be printed in denial notifications.
Leave Program Type	GVT_LV_XFR_TYP_TBL	Administer Workforce, Manage Leave (USF), Setup, Leave Transfer Type Table	Set up leave programs, specify the program type, and indicate limits on donations and balances.
Leave Bank Details	GVT_LV_BANKMEM_SEC	Click the Leave Bank Details button on the Leave Program Type Table page	Enter Leave Bank board members.
Emergency Leave Transfer Details	GVT_LV_DON_TGT_SEC	Click the Emergency Leave Transfer Details button on the Leave Program Type Table page	Enter the number of donation hours targeted.

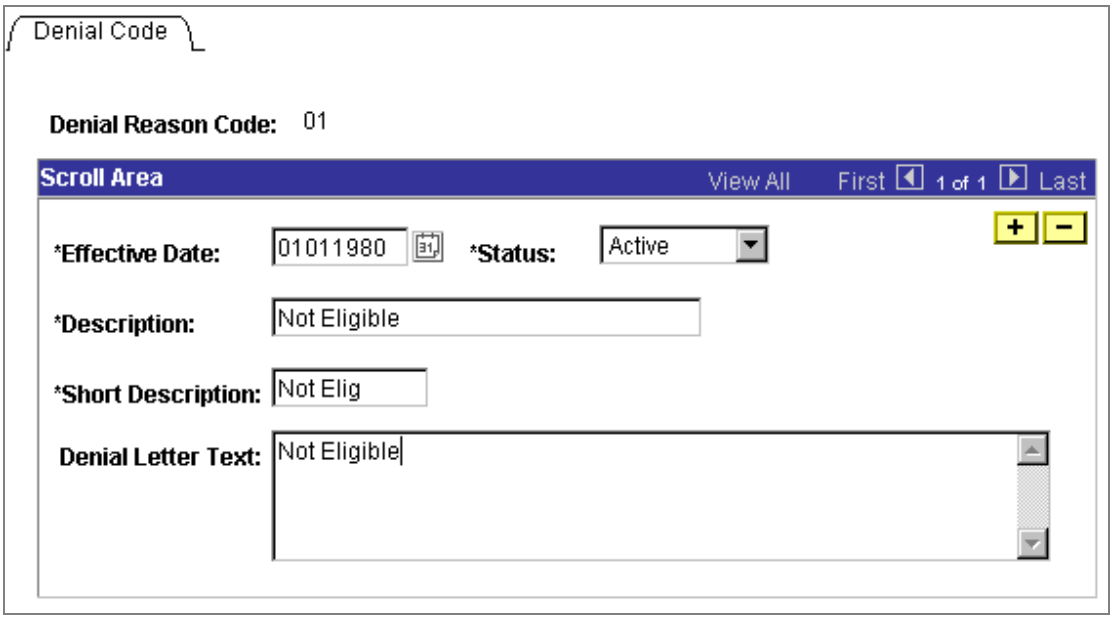
See Also

PeopleSoft Payroll for North America PeopleBook, "Defining Earnings and Using Earnings Codes," USF Defining Earnings Accrual Classes.

Setting Up Leave Class Rule Criteria

Setting Up Denial Codes and Denial Notification Letter Text

Access the Denial Code page.

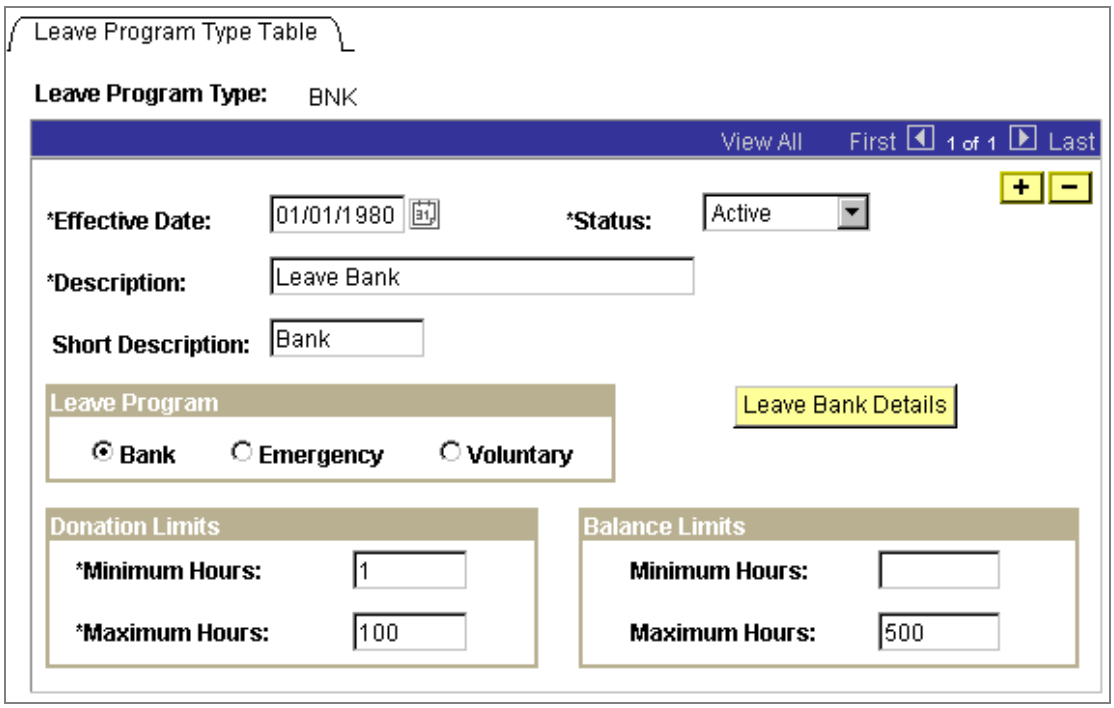


Denial Code page

Denial Letter Text Enter details of the reason for denial that you want to be included in the denial notification.

Setting Up Leave Transfer Programs.

Access the Leave Program Type Table page



Leave Program Type Table page

Leave Program Type Define your leave program codes.

Leave Program Select the type of leave transfer program (Bank, Emergency, Voluntary) to associate with this Leave Program Type code.

Donation Limits

Balance Limits Enter the **Minimum Hours** and **Maximum Hours** allowable for donations and balances.

Leave Bank Details If you select *Bank* in the **Leave Program** group box, the system adds the **Leave Bank Details** button to the page when you save. Use this button to access the Leave Bank Details page, where you enter the Leave Bank board members and indicate those who are labor representatives.

Emergency Leave Transfer Dt (emergency leave transfer details) If the Leave Program Type is Emergency, the system adds the **Emergency Leave Transfer Details** button to the page when you save. Use this button to access the Emergency Leave Transfer Details page, where you record the number of donation target hours.

Understanding Leave Earning Type

PeopleSoft provides five Leave Earning Type codes as translate values. Associate these types with earnings codes that you set up for processing leave transfers. The type code you select

defines the function of the earnings code within the leave bank and transfer program. The following table summarizes the processing that is triggered by these codes.

Leave Earn Type	*Leave Bank and Transfer Process*	*Earning Accrual Process*
Donate to Bank	Updates the donor's Additional Pay page with the hours contributed to a Leave Bank Program. Use the Bank Application page to enter requests. Updates Leave Bank Ledger inquiry page with hours contributed.	Donor's Annual: • Increase Hours Taken YTD • Reduce Balance YTD
Donate to Emergency	Updates the donor's Additional Pay page with the hours contributed to an Emergency Leave Transfer Program (ELTP). Use the Bank Application page to enter requests. Updates the Leave Ledger with hours contributed.	Donor's Annual: • Increase Hours Taken YTD • Reduce Balance YTD
Donate to Recipient	Updates the donor's Additional Pay page with the hours contributed in the Voluntary Leave Transfer Program (VLTP). Use the Voluntary Contributions page to enter requests. Updates the Leave Donation Tracking page.	Donor's Annual: • Increase Hours Taken YTD • Reduce Balance YTD
Received from Bank	Updates the recipient's Additional Pay page with the hours received from the Bank or ELTP. Use the Recipient Application page to enter requests. Updates Leave Ledgers with hours withdrawn.	Leave Program Recipient: • Increase Balance YTD

Leave Earn Type	*Leave Bank and Transfer Process*	*Earning Accrual Process*
Received from Donor	Updates the recipient's Additional Pay page with the hours received through the VLTP. Use the Recipient Application page to enter requests.	Leave Program Recipient: • Increase Balance YTD

See Also

PeopleSoft Payroll for North America PeopleBook, "Defining Earnings and Using Earnings Codes," Establishing Earnings Codes

Setting Up Earnings Codes for Leave Transfer

Set up three unique earnings codes for three distinct purposes:

- For donors to donate leave to transfer programs.
- For recipients to receive (accrue) leave from transfer programs.
- For recipients to use leave accrued from transfer programs.

Setting Up Earnings Codes for Donors and Recipient Accruals

Use the Earnings Table Component.

- General page: In the Payment Type field, select *Hours Only*. Leave transfer earnings codes process hours only; there are no earnings or deductions associated.
- Taxes page: There are no taxes taken. In the Earning Allocation group box, select Maintain Earnings Balances.
- Federal Additional Earnings page: In the Leave Bank and Transfer Type group box, select the appropriate Leave Earnings Type.
- Calculation Page: The Multiplication Factor must be 0.0000 to ensure no earnings.

Setting Up an Earnings Code for Recipients to Use Transferred Leave

Use the Earnings Table Component.

- General page: In the Payment Type field, select *Hours Only*.
- Taxes page: The earnings are fully taxable. In the Earning Allocation group box, select Add to Gross, Maintain Earnings Balances, and Hours Only.
- Calculation Page: The Multiplication Factor must be 1.0000 to ensure the earning is paid at the regular hourly rate.

See Also

PeopleSoft Payroll for North America PeopleBook, "Defining Earnings and Using Earnings Codes," Establishing Earnings Codes

Understanding Leave Earning Type

Setting Up Earnings Accrual Classes for Leave Transfer

Set up earning accrual classes for the following purposes:

- Leave program recipient:

  Once an employee is approved as a recipient in either a Bank, ELTP or VLTP, they must be enrolled into an Earning Accrual Class to track hours received and used during their program participation.

- Deferred Annual/Sick

  When an employee is participating in either an Agency Bank or VLTP, they must terminate their enrollment from regular annual and sick leave plans and enroll into the deferred annual and sick earning accrual classes. The deferred programs will track service hours and entitlement to a defined maximum accrual. For example, full time employees may accrue to the maximum of 40 hours.

  Employees participating in an ELTP are not subject to the accrual limit and do not need to be enrolled into the deferred programs.

- Annual Leave:

  All donated hours are taken from the employee's annual leave accrual class. You will need to update each of your annual accrual classes with the three donor earning codes defined with Donate to Bank, Donate to Emergency, and Donate to Recipient leave earning types.

Setting Up Earnings Accrual Classes for Leave Program Recipients

Use the Earnings Accruals Component.

- Class page: In the Leave Type field, select *Leave Program*.
- Balance page: The values you enter depend upon the purpose of the earnings code you're adding to the class.

  For earnings codes used to accrue recipient leave transfer, select *Add to Hours Earned.*

  For earnings codes used when recipients use transferred leave, select *Add to Service Hours* and *Add to Hours Taken*.

Setting Up Earnings Accrual Classes for Deferred Annual/Sick

You need a deferred earning accrual class for every annual and sick accrual class that has a different accrual maximum during an employee participation in the leave bank or transfer programs.

Deferred Accrual Classes need to mirror the accrual classes that they are replacing; the only difference in the two classes is the Leave Type and Accrual Ceiling.

For example, the Deferred Annual Accrual Class mirrors the Annual Accrual Class by having the same accrual calculation, carryover, expiration/termination, accrual rates, and balance earning codes. The only difference in the two classes is the Leave Type and Accrual Ceiling.

Use the Earnings Accruals Component.

- Class page: In the Leave Type field, select *Deferred Annual*.
- Ceiling/Carryover page: Set up the accrual ceiling as desired for the deferred accrual class.

Setting Up Annual Accrual Classes for Leave Transfer Processing

All donated hours to bank and transfer programs are withdrawn from the employee's Annual Leave Accrual Class. You must update all your Annual Accrual Class Balance tables with the three earning codes you set up with the Leave Earnings Types: Donate to Bank, Donate to Emergency, and Donate to Recipient.

See Also

PeopleSoft Payroll for North America PeopleBook, "Defining Earnings and Using Earnings Codes," (USF) Defining Earnings Accrual Classes

Setting Up Leave Class Rules for Leave Transfer

You can define leave class rules to automatically enroll an approved recipient into the accrual class that you create to track leave program activity. On the Leave Class Rules page, define the automatic enrollment rule for each leave program type you set up.

- Select *Leave Program Status* as the Leave Class Rules Criteria Type.
- Select the appropriate Leave Program Type.

See Also

Setting Up Leave Class Rule Criteria

Administering Leave Donations

Employees may donate hours to an agency Bank, ELTP or VTLP. The contribution process is the same for the Bank and ELTP programs where hours are donated to a common pool.

However the contribution process is a little different for the VLTP, where the hours are donated directly to an employee.

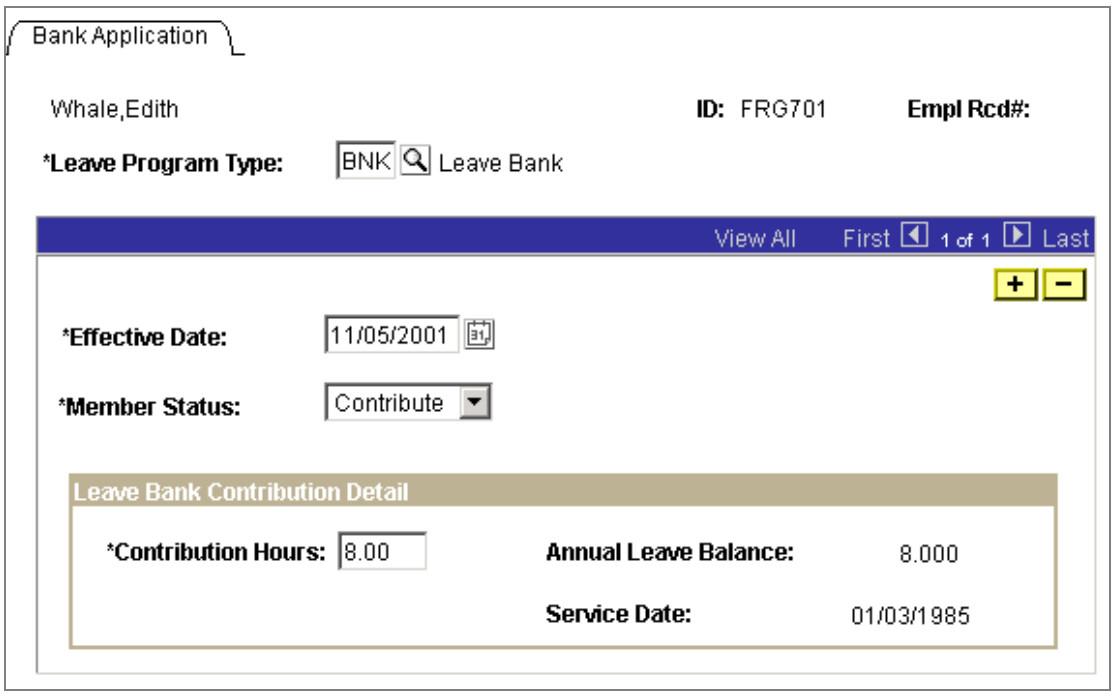
- Enter employee requests to contribute leave to a Leave Bank or ELTP on the Leave Bank Application page.
- Enter employee donations to the VLTP on the Voluntary Contributions page.
- Enter employee requests to donate to another agency's leave transfer program on the External Leave Donations page.
- Run the Leave Bank and Transfer process to process donations and update accruals, additional pay, and leave ledgers.

Pages Used to Administer Leave Donations

Page Name	*Object Name*	*Navigation*	*Usage*
Bank Application	GVT_LV_BANK_APP	Administer Workforce, Manage Leave (USF), Use, Bank Application	Enter employee requests to contribute leave to a Leave Bank or ELTP.
Voluntary Contributions	GVT_LV_DON_CONTRIB	Administer Workforce, Manage Leave (USF), Use, Voluntary Contributions	Enter employee donations to the VLTP.
External Leave Donations	GVT_LV_DON_EXT	Administer Workforce, Manage Leave (USF), Use, External Donations	Enter employee requests to donate to another agency's leave transfer program.
Process Leave Bank / Transfer	RUNCTL_FGPY022	Administer Workforce, Manage Leave (USF), Process, Leave Bank and Transfers	Run the Leave Bank and Transfer process to process donations and update accruals, additional pay, and leave ledgers

Entering Employee Donations to a Leave Bank or Emergency Leave Transfer Program

Access the Bank Application page.



Bank Application page

Leave Program Type Select the leave program type to which the employee is donating. Valid values are the Leave Program Types you set up for Bank and Emergency leave programs.

Effective Date The request date of the application.

Member Status Select or view the member status of the leave request. Valid values are:

Applied: The Leave Bank Board has not processed the request and no annual leave contributions have been taken from the employee's current Earnings Accrual Class balance.

Approved: The leave review board has approved the donor's leave request. The system processes only *Approved* requests.

Contribute: the system processes the hours during the next payroll cycle and updates the hours on the employee's Additional Pay to reduce the balance by the donation hours on the application. Only the system can update the applicant's request to *Contribute*; it issues an error message if you select this value.

Cancelled: Indicates any other reason that the request is terminated.

Denied: The Leave Bank Board has evaluated the request and denied the donor's leave request.

Denial Reason 1 and 2 — If you select Denied as the Member Status, the Denial Reason fields appear. You must provide the applicant with at least one reason for denial.

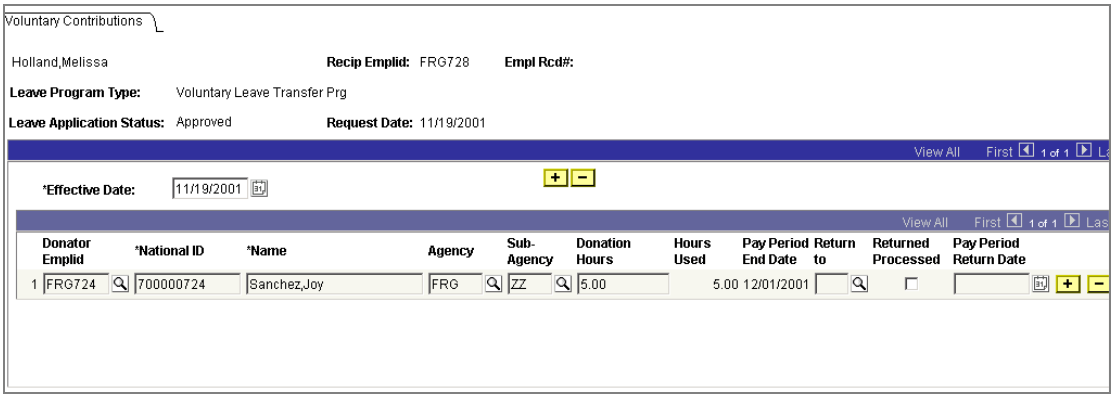
Contribution Hours — Specify the number of hours the donor is contributing to the leave bank or ELTP.

Annual Leave Balance — The number of hours of annual leave the employee has as of this request date (Effective Date).

Service Date — The basis for determining the length of service, on which the required contribution minimum is based.

Entering Employee Donations to Voluntary Leave Transfer Program

Access the Voluntary Contributions page by entering the recipient's ID and the leave program type.



Voluntary Contributions page

Recipient information is displayed at the top of the page.

Effective Date — The date of the donation.

Donor Tracking

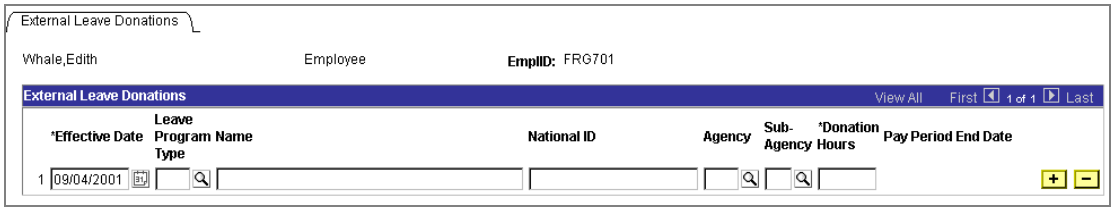
In this group box, enter the donor information. The system enters the pay period in which the donation was processed. Donations are not processed until the recipient's application is approved.

The **Return to, Returned Processed,** and **Pay Period Return Date** assist you in recording your manual leave donation return process. If an employee has donated leave, and it is not needed, it may be returned to the donor.

Return to	Acknowledges the donor's choice for the disposition of where the leave should be returned in the case that any unused leave is returned. Valid values are ***Donor*** or ***Bank***. This field is informational only and used to used to track the return of excess leave donation hours.
Returned Processed	When a leave recipient has excess leave when their emergency is over, select this check box when the leave amount to be returned is restored to the Donor. This field is informational only and used to track the return of excess leave donation hours.
Pay Period Return Date	Informational only and used to track the return of excess leave donation hours. Update this field with the date the leave is restored to the Donor.

Entering External Leave Donations

Access the External Leave Donations page.



External Leave Donations page

Record the details of donations made by an employee in your agency to another agency's leave transfer program. The system updates the donor's accrual balances when you run the Leave Bank / Transfer process.

Running the Leave Bank / Transfer Process for Donors

Run the Leave Bank & Transfers process (FGPY022) after employees have donated hours. The process loads the Additional Pay page and applies the donation amount to the Leave Ledgers. The process can be run multiple times and should be run prior to your payroll cycle.

The system processes all employee leave bank applications with Member Status *Approved* and an Effective Date equal to or before the **As of Date** you enter on the run control page.

See Also

PeopleSoft Payroll for North America PeopleBook, "Maintaining Payroll Data," Entering Additional Pay Earnings Information

Running the Leave Bank / Transfer Process for Approved Recipients

Administering Leave Recipients

Employees may receive hours from a Bank, ELTP or VTLP. The process to receive hours from all leave program types is the same.

1. Enter employee requests to receive hours from any of the leave program types. Use the Recipient Application page.
2. Verify the employee's leave accrual class and switch annual and sick leave to deferred accrual classes if appropriate. Use the Employee Accruals page.
3. Run the Leave Bank and Transfer process to process approved recipients and update accruals, additional pay, and leave ledgers.
4. View and adjust the data entered by the process on the Leave Ledger page.
5. View recipient accrual balances on the Accrual Summary page.

Pages Used to Administer Leave Recipients

Page Name	*Object Name*	*Navigation*	*Usage*
Recipient Application	GVT_LV_RECIP_INFO	Administer Workforce, Manage Leave (USF), Use, Recipient Application	Enter employee requests to receive hours from any of the leave program types.

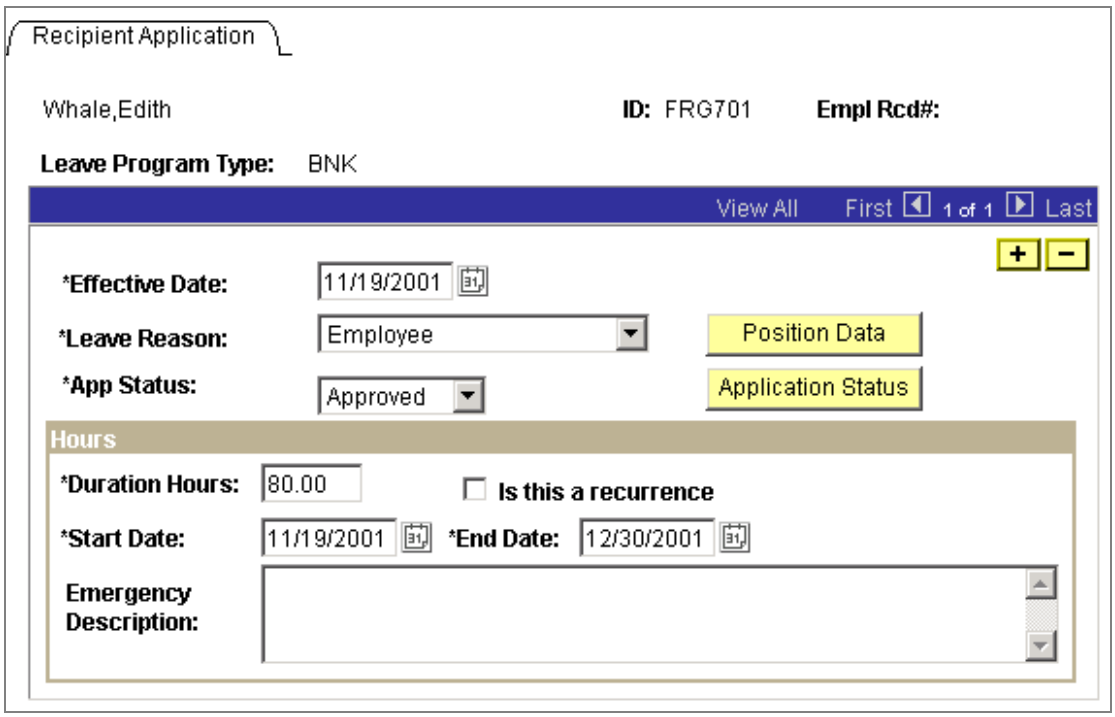
See Also

Manually Entering or Adjusting Leave Enrollment

Pages Used to Administer Leave Donations

Entering Requests to Receive Transferred Leave

Access the Recipient Application page.



Recipient Application page

Effective Date — The date that leave program participation was requested.

Leave Reason — Select the reason for the emergency leave requested. Valid values are ***Employee, Family Member,*** and ***Agency Emergency***.

App Status (application status) — Select the status from the following values:

Pending: The leave review board has not processed the request.

Approved: The leave review board has approved the request.

Denied: The leave review board has denied the request.

Separated: The employee separates from Federal service before the originally requested end date.

Cancelled: Any other reason that the request is not active.

Position Data — Click this button to view the position number, pay plan, grade, and step of the potential leave recipient as of the request date. Standard hours and tour of duty are used to validate the minimum number of absence hours.

Application Status	Click this button to identify the Approver and the Status Date. If the Leave Recipient Application has a status of Denied, then you may enter up to two. You must enter at least one denial reason. These codes are used later when generating Leave Recipient Denial letters.

Hours

Duration Hours	The number of hours requested (to the quarter-hour).
Is this a recurrence	Select if the reason is a recurrence.
Start Date **End Date**	The days on which the recipient requests the leave to begin and end.
Emergency Description	Detail the reasons for needing transferred leave, including a brief description of the nature and severity of the medical emergency.

Enrolling Recipients in the Leave Program Accrual Class

While receiving hours from a leave program, the recipient must be enrolled in the leave program accrual class to record hours donated and used.

If the program is either a Bank or VLTP, terminate enrollment from their regular and sick earnings accrual classes. Then enroll the recipient into the deferred accrual classes to track accruals during the program participation and enforce the maximum entitlement.

If there is an auto enrollment Leave Class Rule set up for leave programs, then once the approved request is saved, the application opens the employee's Employee Accruals page and inserts the earning accrual defined in the class rule. While in the page, you may terminate the annual and sick and enroll in the employee in the deferred annual and sick accrual classes.

See Also

Manually Entering or Adjusting Leave Enrollment

Running the Leave Bank / Transfer Process for Approved Recipients

The Leave Bank & Transfer process (FGPY022) processes *Approved* recipients.

If the employee is participating in a Bank or ELTP, the process:

- Updates the recipient's Additional Pay page with the earnings code defined on the Earnings Code Table with *Received from Bank* as the Leave Earning Type.
- Updates the Leave Ledger with hours withdrawn.

- If the employee is participating in a VLTP, the process updates the recipient's Additional Pay page with earnings code defined on the Earnings Code Table with *Received from Donor* as the Leave Earning Type.

See Also

Running the Leave Bank / Transfer Process for Donors

Viewing Leave Transfer Data

After you run the Leave Bank / Transfer process, you can view leave transfer data.

- View and adjust the data entered by the process on the Leave Ledger page.
- View the recipients to whom a donor has contributed through VLTP on the Leave Donation Tracking page.
- View donor contributions or hours received by recipients on the Additional Pay page.
- View donor and recipient accrual balances on the Accrual Summary page after payroll is processed and leave accruals are run.
- View a summary of participation in a leave transfer program on the Leave Program Summary page.

Pages Used to View Leave Transfer Data

Page Name	*Object Name*	*Navigation*	*Usage*
Leave Ledger	GVT_LV_BANK_LDGR	Administer Workforce, Manage Leave (USF), Inquire, Leave Bank Ledger	View and adjust Leave Bank and ELTP data entered by the process.
Leave Donation Tracking	GVT_LV_DON_TRACK	Administer Workforce, Manage Leave (USF), Inquire, Leave Donation Tracking	View the number of hours and the recipients to whom a donor has contributed through VLTP.
Leave Program Summary	GVT_LV_PRGM_SUMM	Administer Workforce, Manage Leave (USF), Inquire, Leave Program Summary	View a summary of participation in a leave transfer program.

See Also

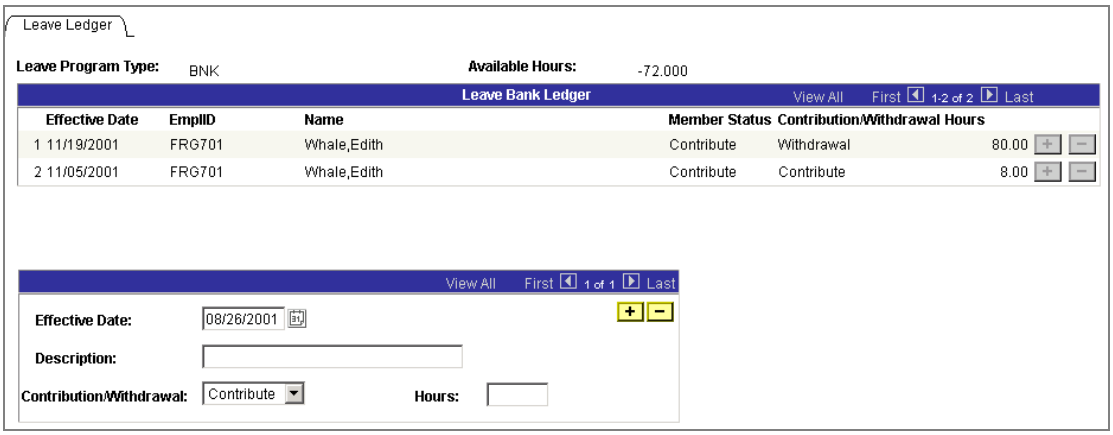
PeopleSoft Payroll for North America PeopleBook, "Maintaining Payroll Data," Entering Additional Pay Earnings Information

PeopleSoft Payroll for North America PeopleBook, "Adjusting Employee Balances," (USF) Adjusting Leave Accrual Balances

Viewing Leave Donations to Leave Bank and Emergency Leave Transfer Programs

The Leave Ledger tracks the activity within the Bank and ELTP leave programs. The Leave Bank & Transfer process updates the ledgers with the transactions it has processed.

Access the Leave Ledger page.



Leave Ledger page

Available Hours The total number of hours available in the bank or ELTP. The system updates this value when you adjust **Contribution/Withdrawal** and **Hours** fields.

Leave Bank Ledger

Effective Date The As Of Date on the Leave Bank / Transfer process run control page.

EmplID / Name List of all the employees who have participated in the bank.

Member Status The member status for the transfer.

Contribution / Withdrawal Indicates whether each transaction is a contribution or a withdrawal.

Hours The number of hours contributed or withdrawn in each transaction.

Agency Ledger Adjustments

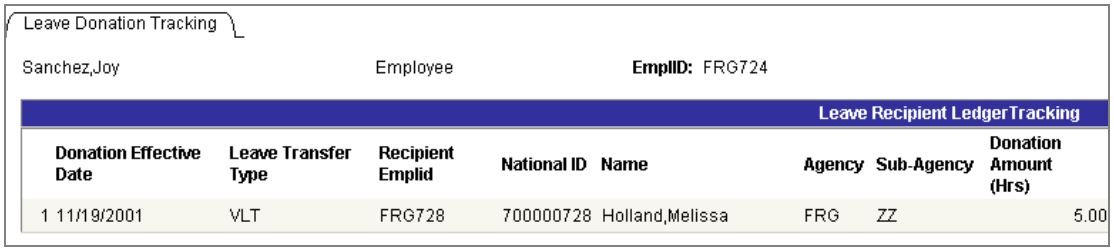
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To adjust the hours, enter the effective date, the reason for the adjustment, and the hours to add or subtract. The system updates the **Available Hours** balance at the top of the page.

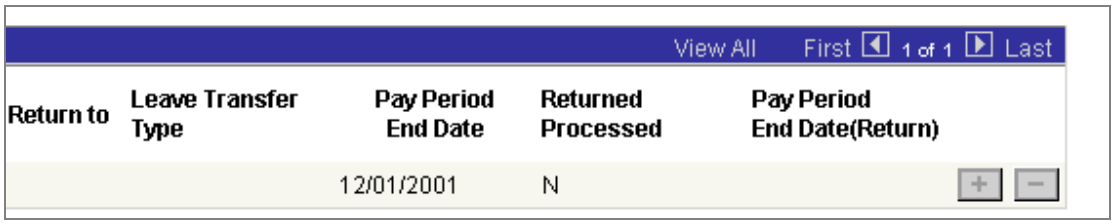
Viewing Leave Donations to Voluntary Leave Transfer Programs

The Leave Donation Tracking page tracks the activity within the VLTP program. The Leave Bank & Transfer process updates this page with the transactions it has processed.

Access the Leave Donation Tracking page.



Leave Donation Tracking page (1 of 2)



Leave Donation Tracking page (2 of 2)

The page lists the donor's contributions by effective date and recipient.

Viewing Accrual Summaries

View donor and recipient accrual balances on the Accrual Summary page after payroll is processed and leave accruals are run.

- Donors: The fields Hours Taken Year-to-Date and Hours Balance Year-to-Date are updated with the hours contributed.
- Recipients: Leave program earning accrual is updated with the hours received. When the recipient uses hours, the Hours Taken Year-to-Date and Service Hours YTD are updated.
- Recipients who terminate regular and sick accrual classes and enroll in deferred accrual classes: The deferred accrual class is updated with the pay period's Service Hours YTD, Hours Earned Year-to-Date, and Hours Balance Year-to-Date

See Also

PeopleSoft Payroll for North America PeopleBook, "Adjusting Employee Balances," (USF) Adjusting Leave Accrual Balances

Viewing Additional Pay

The Leave Bank & Transfer process inserts a row in the Additional Pay page for hours donated or received.

Earnings Code — The earnings code associated with the appropriate Leave Earn Type.

Effective Date — The As Of Date on the Leave Bank / Transfer process run control page.

Earnings End Date — The end date of the pay period in which the Effective Date falls.

Hours — The hours donated or received.

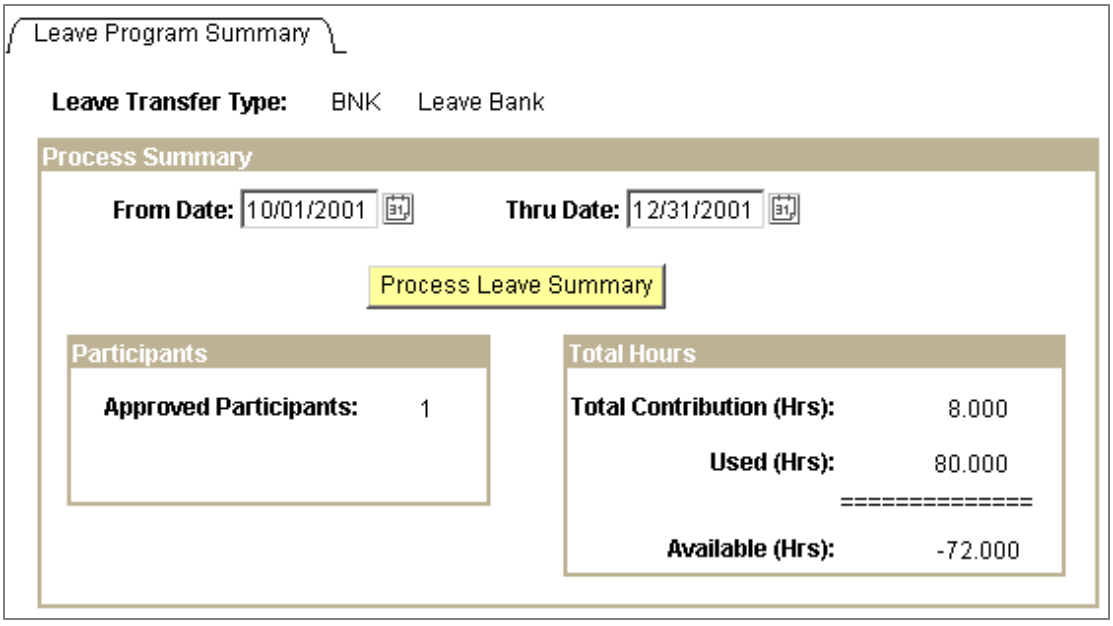
See Also

PeopleSoft Payroll for North America PeopleBook, "Maintaining Payroll Data," Entering Additional Pay Earnings Information

Understanding Leave Earning Type

Viewing Leave Program Summary Data

Access the Leave Program Summary page by selecting a Leave Transfer Program type.



Leave Program Summary page

From Date
Thru Date — Define the time period for which you want to see the summary.

Process Leave Summary	Click this button after completing the date range. The system displays summary information.
Participants	The system displays the number of **Approved Participants** and **Denied Participants.**
Total Hours	The system displays the **Total Contribution** hours, **Used** hours. **Available** hours is derived from the contribution hours and used hours.

Reporting on Leave Transfer Programs

PeopleSoft provides the following leave transfer reports:

- FGPY028 – Leave Acceptance Notifications.
- FGPY029 – Leave Bank Participants (required by OPM).
- FGPY030 – Leave Transfer Participants (required by OPM).
- FGPY031 – Leave Denial Notifications.

See Also

PeopleSoft Payroll for North America PeopleBook, "Appendix A: PeopleSoft Payroll for North America Reports"

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