



# PeopleSoft 8.3 Human Resources PeopleBook: Administer Salaries for The Netherlands

PeopleSoft 8.3 Human Resources PeopleBook: Administer Salaries for The Netherlands

SKU HRMSr83HNS-B 1001

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Printed in the United States.

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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](http://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.

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**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.

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### 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.

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### 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.

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**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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### Hardcopy Documentation

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

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

## 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.

| <b>Field</b>                           | <b>Definition</b>                                                                                                                                                                                                                         |
|----------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Address 1, Address 2, Address 3</b> | Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.                                                                                                            |
| <b>As of Date</b>                      | The last date for which a report or process includes data.                                                                                                                                                                                |
| <b>Block (Bloque)</b>                  | 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.                                                                                |
| <b>Business Unit</b>                   | 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.                                              |
| <b>City</b>                            | Name of city for address.                                                                                                                                                                                                                 |
| <b>Comment(s)</b>                      | Freeflow text entry that enables you to add comments.                                                                                                                                                                                     |
| <b>Company</b>                         | 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. |

| <b>Field</b>                               | <b>Definition</b>                                                                                                                                                                                                                                                                                                                                                                                  |
|--------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Country</b>                             | Country for address. Other address fields will be adjusted to reflect Country choice.<br><br>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. |
| <b>County (also Prefecture and Parish)</b> | Name of county (prefecture/parish) for address, if applicable.                                                                                                                                                                                                                                                                                                                                     |
| <b>Currency Code</b>                       | The 3-letter code in which the currency is specified.                                                                                                                                                                                                                                                                                                                                              |
| <b>Description</b>                         | Freeflow text up to 36 characters that describes what you are defining.                                                                                                                                                                                                                                                                                                                            |
| <b>Department</b>                          | An identification code that represents an organization in a company.                                                                                                                                                                                                                                                                                                                               |
| <b>Door (Puerta)</b>                       | In Spanish addresses, identifies the door name or number.                                                                                                                                                                                                                                                                                                                                          |
| <b>Effective Date</b>                      | 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.                                       |
| <b>Email</b>                               | The email address for a person or organization.                                                                                                                                                                                                                                                                                                                                                    |
| <b>EmplID (employee ID)</b>                | Unique identification code for an individual associated with your organization.                                                                                                                                                                                                                                                                                                                    |
| <b>Empl Rcd# (Employee Record Number)</b>  | A system-assigned number that indicate an employee has more than one record in the system.                                                                                                                                                                                                                                                                                                         |
| <b>Fax (also Fax Number)</b>               | The fax number for a person or organization.                                                                                                                                                                                                                                                                                                                                                       |
| <b>Floor (Piso)</b>                        | In Spanish addresses, identifies the floor name or number.                                                                                                                                                                                                                                                                                                                                         |
| <b>House</b>                               | Identifies the type of house.                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Initials</b>                            | Initials of individual.                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Language</b>                            | Language spoken by employee/applicant/non-employee.                                                                                                                                                                                                                                                                                                                                                |
| <b>Language or Language Code</b>           | 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.<br><br>Language also refers to the language spoken by an employee, applicant, or non-employee.                                                                                                                                                            |
| <b>Last Run On</b>                         | The date that a report or process was last run.                                                                                                                                                                                                                                                                                                                                                    |
| <b>Locality</b>                            | A tax location within an organization.                                                                                                                                                                                                                                                                                                                                                             |
| <b>Name</b>                                | Name of individual.                                                                                                                                                                                                                                                                                                                                                                                |

| <b>Field</b>                       | <b>Definition</b>                                                                                                                                                                                                                                                                                                                                                                                                  |
|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>National ID</b>                 | 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.                                                                 |
| <b>Number</b>                      | 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.                                                                                                                                                                                                                                    |
| <b>Phone</b>                       | The phone number for a person or organization.                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Phone Extension</b>             | The phone extension number for a person or organization.                                                                                                                                                                                                                                                                                                                                                           |
| <b>Phone Type</b>                  | Identifies the type of phone number entered in the Telephone field. Valid values are <b>Business</b> , <b>Campus</b> , <b>Cellular</b> , <b>Dormitory</b> , <b>FAX</b> , <b>Home</b> , <b>Other</b> , <b>Pager 1</b> , <b>Pager 2</b> , or <b>Telex</b> .                                                                                                                                                          |
| <b>Post Code (also Postal)</b>     | Postal code for address.                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Prefix</b>                      | Prefix for individual (such as Mr., Ms., Mrs., Dr., and so on)                                                                                                                                                                                                                                                                                                                                                     |
| <b>Process Frequency group box</b> | Designates the appropriate frequency in the <b>Process Frequency</b> group box:<br><br><b>Once</b> executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to <b>Don't Run</b> .<br><br><b>Always</b> executes the request every time the batch process runs.<br><br><b>Don't Run</b> ignores the request when the batch process runs. |
| <b>Process Monitor</b>             | This button takes you to the Process List page, where you can view the status of submitted process requests.                                                                                                                                                                                                                                                                                                       |
| <b>Regulatory Region</b>           | 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.                                                                                                                        |
| <b>Report ID</b>                   | Identifies a report.                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Report Manager</b>              | 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).                                                                                                                                                                                            |
| <b>Request ID</b>                  | A request identification that represents a set of selection criteria for a report or process.                                                                                                                                                                                                                                                                                                                      |
| <b>Run</b>                         | 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.                                                                                                                                                                                                                                                         |

| <b>Field</b>                 | <b>Definition</b>                                                                                                                                                             |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Run Control ID</b>        | Identifies specific run control settings for a panel.                                                                                                                         |
| <b>Run Date</b>              | The date that a process was run or a report was generated.                                                                                                                    |
| <b>Run Time</b>              | The time that a process was run or a report was generated.                                                                                                                    |
| <b>SetID</b>                 | 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. |
| <b>Short Description</b>     | Freeflow text up to 15 characters.                                                                                                                                            |
| <b>Stair (Escalera)</b>      | In Spanish addresses, identifies the stair name or number.                                                                                                                    |
| <b>State (also Province)</b> | State (Province) for address.                                                                                                                                                 |
| <b>Status</b>                | Indicates whether a row in a table is <i>Active</i> or <i>Inactive</i> .                                                                                                      |
| <b>Street Type</b>           | 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.                    |
| <b>Telephone (Phone)</b>     | The telephone number for a person or organization.                                                                                                                            |
| <b>User ID</b>               | 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.

|                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|---------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Title</b>                    | 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.                                                                                                                                                                                                                                                                                                                                       |
| <b>Prefix and Name Prefix</b>   | Select a Prefix or Name Prefix, if applicable.                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Royal Prefix</b>             | Select a Royal Prefix, if applicable.                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>First Name</b>               | Enter the employee's official first name.                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Preferred First Name</b>     | 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.                                                                                                                                                                                                                                                                                                 |
| <b>Last Name Preference</b>     | 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.                                                                                                                                                                                                                                                                                         |
| <b>Middle</b>                   | Enter the employee's middle name, if applicable.                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Last Name</b>                | Enter the employee's official last name.                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Suffix</b>                   | Select a suffix, if applicable.                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Second Last Name</b>         | For Spanish employees, enter the second surname (mother's surname).                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Alternate Character Name</b> | <p>Use this field to enter the employee's name using alternate characters (such as Japanese phonetic characters).</p> <p><b>Note.</b> 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.</p> <p><b>Warning!</b> Be sure to select the correct character set on the Installation Table – Alternate Characters page. Using the wrong character set generates an error message.</p> |
| <b>Royal Suffix</b>             | 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.                                                                                                                                                                                                                                                                                                                  |
| <b>Name</b>                     | The system displays the employee's name as it will appear in the system.                                                                                                                                                                                                                                                                                                                                                                                                                                     |

Displaying Japanese Names on Pages

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

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

Person Name

Last:

津村

First:

友則

Alternate Character Name:

ツムラトモリ

Name:

津村 友則

Japanese name format on a page

See Also

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

Entering Address Information

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

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

|               |                                                                  |
|---------------|------------------------------------------------------------------|
| House Type    | Enter the house type, if applicable.                             |
| Postal Search | Click <b>Postal Search</b> to use international address formats. |

Entering or Viewing Pay Components

Amounts Tab

Pay Components

First1 of 1Last

AmountsChangesConversion

| *Rate Code | Seq | Details                 | Comp Rate | Currency | Frequency | Points | Percent | Rate Code Group |
|------------|-----|-------------------------|-----------|----------|-----------|--------|---------|-----------------|
| 1          |     | <a href="#">Details</a> |           |          |           |        |         |                 |

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.<br><br><b>Note.</b> 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 <b>Details</b> 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 <b>Percent</b> rate codes.                                                       |
| Points                                                 | The salary points associated with this rate code, if any.                                                                                                                                                                                                                                                                   |
| Percent                                                | If the rate code rate type is <b>Percent</b> , 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**

|                         |                                                                                                      |
|-------------------------|------------------------------------------------------------------------------------------------------|
| <b>Comp Rate Code:</b>  | TSDFLT                                                                                               |
| <b>Description</b>      | Salaried Default                                                                                     |
|                         | <input checked="" type="checkbox"/> <b>Base Pay</b> <input type="checkbox"/> <b>Use Highest Rate</b> |
|                         | <input type="checkbox"/> <b>Default Without Override</b>                                             |
| <b>Rate Code Type:</b>  | Flat Amount                                                                                          |
| <b>Rate Code Class:</b> |                                                                                                      |

### Comp Rate Code Secondary Panel

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

### See Also

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

### Changes Tab

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

### Pay Components – Changes page

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

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

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

### Pay Components – Conversion

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

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

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

Example of a required field label

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

## Typographical Conventions and Visual Cues

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

Please take a moment to review the following typographical cues:

|                             |                                                                                                                                                                                                                                                                                                                                                                                                                |
|-----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <code>monospace font</code> | Indicates PeopleCode.                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Bold</b>                 | 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).<br><br>We also use boldface when we refer to navigational paths, menu names, or process actions (such as <b>Save</b> and <b>Run</b> ). |
| <i>Italics</i>              | Indicates a PeopleSoft or other book-length publication. We also use italics for <i>emphasis</i> and to indicate specific field values. When we cite a field value under the page on which it appears we use this style: <i>field value</i> .<br><br>We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>0</i> , not the letter <i>O</i> .     |
| KEY+KEY                     | Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.                                                                                                                                                                                                  |
| <b>See Also</b>             | 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:<br><br><b>See Also</b><br><br><i>About These HRMS PeopleBooks</i> , <b>PeopleSoft 8.3 HRMS PeopleBooks Preface</b>                    |

---

**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.

| <b>Page</b>       | <b>System Name</b>                                                                                                                                                        | <b>Navigation</b>                         | <b>Usage</b>                          |
|-------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------|---------------------------------------|
| 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<br>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: Netherlands Administration

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

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.

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**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.

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

| <b>Field</b>                     | <b>Definition</b>                                                                                                                                     |
|----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Deduction</b>                 | Any amount taken from an employee's pay check to offset all or part of the cost of the employee's benefits.                                           |
| <b>Deduction Code</b>            | The code assigned to a benefit deduction.                                                                                                             |
| <b>FSA Maximum Annual Pledge</b> | 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. |
| <b>FSA Minimum Check Amount</b>  | This is the minimum amount for which a check will be printed.                                                                                         |
| <b>Plan Type</b>                 | 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

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## 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 Your Salary Administration System

This chapter provides an overview of administering salaries for the Netherlands and shows you how to:

- Set up your salaries for the Netherlands system.
- Define earnings and payments.
- Define benefits and other deductions.
- Organize your payroll processes.
- Establish additional benefits features.
- Specify employee bank information.

## Understanding Administering Salaries for the Netherlands

The Administer Salaries for the Netherlands business process of PeopleSoft Human Resources enables you to collect the information you need to process payroll, such as information about payments to employees (including regular salary and related additional earnings) and deductions from pay (including benefits deductions and related incidental deductions). The business process helps you manage various payments and deductions, and ensure the correct, timely payment of wages to employees—regardless of which payroll system you use.

The Administer Salaries for the Netherlands business process integrates with and supplements the basic personnel administration features of PeopleSoft Human Resources. Existing salary, personal, and job data for employees are incorporated into the Administer Salaries for the Netherlands pages so that you enter the information into the system only once. The additional employee personal and beneficiary information that you provide in this business process supplements the existing personal and job data for both your employees and their dependents. There are additional pages to enter information about incidental payments and deductions, which aren't addressed elsewhere in the system.

## Before You Begin

Before you enter information about payments, benefits, and deductions for your employees, complete the following information:

- Enter employee personal and job data in the Administer Workforce business process.
- Enter any companies that you plan to run payroll for in the Company table, and their employer tax identification numbers and default pay group.
- Create the appropriate salary plans and grades for your companies on the Salary Plan and Salary Grade tables.

Use the Salary Plan table to distinguish salary plans for different types of employees, such as permanent and temporary hires. Use the Salary Grade table to specify the salary grades for your companies and the corresponding salary ranges (minimum, midpoint, and maximum) for each grade.

### See Also

*PeopleSoft Human Resources PeopleBook: Administer Workforce*, “Hiring Your Workforce”

*PeopleSoft Application Fundamentals for HRMS PeopleBook*, “Working With Companies,” Setting Up Companies, Agencies, and Locations

*PeopleSoft Human Resources PeopleBook: Plan Salaries*, “Setting Up Salary Plans, Grades, and Steps”

## Standard Terms

The following table defines the terminology used throughout the application and this documentation:

|                                      |                                                                                                                                                                                                                                                        |
|--------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Salary Administration</b>         | The functionality that ensures that all of the information about payments and pay deduction for employees is included within your PeopleSoft Human Resources system. Third-party systems need this information to process your organization’s payroll. |
| <b>Pay Groups (or Salary Groups)</b> | Groups of staff that are distinguished from others by a unique set of working conditions, salary packages, and benefits programs. Pay groups can be distinguished across departments within a company.                                                 |
| <b>Permanent (or Semipermanent)</b>  | Payments or deductions that cover a time period with an initial and final date. The final date is open, and the payment or deduction continues indefinitely until the final date is closed.                                                            |
| <b>Incidental</b>                    | Payments or deductions that cover a time period that is closed. The payment or deduction is one-time.                                                                                                                                                  |

|                           |                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Salary</b>             | Refers either to an employee's annual gross salary, or an employee's regular salary (regular earnings) for a pay cycle.                                                                                                                                                                                                                                                                                                             |
| <b>Earnings</b>           | Payments made to employees. Total earnings comprise regular salary and additional earnings. Earnings are either permanent or incidental. For example: regular salary is a permanent payment, permanent additional payment is a traveling allowance for commuting, and incidental additional payment is a performance bonus.                                                                                                         |
| <b>Benefits</b>           | Benefits, in contrast to salary and other earnings, usually involve deductions. Benefits deductions are generally considered permanent or semi-permanent. An example of a permanent benefit deduction is a health insurance deduction.                                                                                                                                                                                              |
| <b>Deductions</b>         | All payroll deductions for benefit plans and other general payments, not including taxes. There are two types of deductions: benefit deductions and general deductions.                                                                                                                                                                                                                                                             |
| <b>General Deductions</b> | Payroll withholdings other than benefits deductions and taxes that are either permanent or incidental (although the term <i>general deductions</i> is most often used in reference to the permanent type). Examples of permanent general deductions include loan payments, parking charges, cafeteria charges, charitable contributions, and union dues. An example of an incidental deduction is the settlement of a cash advance. |
| <b>Taxes</b>              | Payroll withholdings required for payment to the government. In the Administer Salaries for the Netherlands business process of PeopleSoft Human Resources, taxes aren't considered deductions or general deductions; they are just taxes.                                                                                                                                                                                          |

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**Note.** Generally, the pages documented throughout this chapter show only Netherlands Salary Administration functionality.

---

## Setting Up Your Salaries for the Netherlands System

|                                                                                |
|--------------------------------------------------------------------------------|
| <b>To set up the Administer Salaries for the Netherlands business process:</b> |
|--------------------------------------------------------------------------------|

1. Evaluate the data needs of your payroll system.
2. Review the setup tables in the Administer Salaries for the Netherlands business process to see which tables you need to complete to collect all of the data that your payroll system needs.
3. Enter company and employee-specific information into the setup tables.

PeopleSoft recommends that you complete the setup tables in the following order:

| <b>General Category</b>        | <b>Table/Page Name</b>           |
|--------------------------------|----------------------------------|
| General Tables                 | Company Table                    |
|                                | Salary Plan Table                |
|                                | Salary Grade Table               |
| Income and Earnings Tables     | Earnings Table                   |
|                                | Shifts Table                     |
|                                | Earnings Program Table           |
| Deductions and Benefits Tables | Provider Table                   |
|                                | Provider Policy Table            |
|                                | Deduction Table                  |
|                                | General Deduction Table          |
|                                | Benefit Plan Table               |
|                                | Coverage Code Table              |
|                                | Benefits/Deduction Program Table |
| Payroll and Banking Tables     | Holiday Schedule                 |
|                                | Banking Table                    |
|                                | Account Code Table               |
|                                | Pay Group Table                  |
|                                | Pay Run Table                    |
|                                | Pay Calendar Table               |
| Additional Benefits Tables     | Leave Planning Table             |
|                                | Pension Plan Table               |
|                                | Age-Graded Rate Table            |
|                                | Coverage Group Table             |
|                                | Dependent/Beneficiary Component  |

## Defining Earnings and Payments

An employee's total earnings include regular salary and all additional earnings from bonuses, commissions, and other payments. In the PeopleSoft Human Resources system, information about an employee's regular salary resides in the Job Data record. This information is entered into the system using the Job Data component in the global or local Administer Workforce menus.

For all of an employee's earnings, whether regular salary or additional earnings, you must define earnings codes and earnings programs to use to enter these earnings into the system.

### See Also

*PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce"*

## Pages Used to Define Earnings and Payments

| Page Name                            | Object Name           | Navigation                                                                                              | Usage                                                                                                                                                                                                    |
|--------------------------------------|-----------------------|---------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Earnings Table -<br>Earnings Table 1 | EARNINGS_TABLE1_NL    | Define Business Rules, Define General Data (NLD), Setup, Earnings Table, Earnings Table 1               | Enter information about your earnings methods.                                                                                                                                                           |
| Earnings Table -<br>Earnings Table 2 | EARNINGS_TABLE3_NL    | Define Business Rules, Define General Data (NLD), Setup, Earnings Table, Earnings Table 2               | Define the adjustment factors and tax class for your earnings code. Your payroll system can use the adjustment factors and limits that you enter on this page to adjust calculations for earnings codes. |
| Earnings Program Table               | EARNINGS_PROG_TBL_NLD | Define Business Rules, Define General Data (NLD), Setup, Earnings Program Table, Earnings Program Table | Set up an earnings program.                                                                                                                                                                              |
| Shift Table                          | SHIFT_TABLE           | Define Business Rules, Define General Data (NLD), Setup, Shift Table                                    | Establish work shifts for your company and to define shift differential pay if you have work shifts and if shift differential pay is provided to your employees.                                         |

## Creating Earnings Codes

Earnings are payments made to employees, whether for regular salary or additional payments, such as sick pay, bonuses, and commissions. The Earnings table is the basis for the way the system calculates and taxes earnings. Create a work sheet to map the way that you want to define earnings and shifts within the system before you set them up. Also decide on the three-character codes that represent earnings codes, such as REG (regular), VAC (vacation), and HOL (holiday).

At a minimum, establish earnings codes to specify regular earnings and overtime pay. Regular earnings are normally associated with a regular salary or regular hours worked. Regular earnings are typically taxed by all taxing entities and consist of a simple rate-multiplied-by-time calculation, or a flat amount. Overtime pay uses a slightly different method of calculation based on regular earnings. For example, overtime, double time, or triple time earnings codes apply a multiplication factor to the earnings.

Also set up earnings codes for leave pay, such as sick pay, holiday pay, and vacation pay. Set up your earnings codes for these to process accrual accounting, as well. If you want your payroll system to track holiday, vacation, sick, jury duty, personal time off, and so on for leave accruals, set up earnings codes for these leave categories and report the applicable hours.

Depending on your organization's requirements, you may want to create other types of earnings to do the following:

- Record non-hourly earnings, such as bonuses, commissions, or automobile allowances.
- Differentiate between earnings that should or shouldn't be taxed, such as automobile allowances or expense advances.
- Identify the earnings codes you use to pay earnings resulting from late paperwork or collective bargaining.

After you define earnings codes on the Earnings table, assign the basic earnings codes for pay groups using the Pay Group Table – Calc Parameters page.

## Entering Information About Your Earnings Methods

Access the Earnings Table - Earnings Table 1 page.

The screenshot displays the 'Earnings Table 1' page. At the top, there are tabs for 'Earnings Table 1' and 'Earnings Table 2'. Below the tabs, the 'Earnings Code' is 'A05'. The 'Table 1 Details' section includes fields for 'Effective Date' (01/01/1980), '\*Status' (Active), '\*Description' (Admin Uncontrollable OT 5%), and 'Short Description' (AUO 05%). There are also 'View All', 'First', '1 of 1', and 'Last' navigation links. Below the details, there are two sections: 'Permanent/Incidental' with radio buttons for 'Incidental', 'Permanent', and 'Both' (selected); and 'Payment Type' with radio buttons for 'Flat Amount', 'Unit/Override Rate', 'Hours Only', 'Amounts Only', 'Defined by Salary System', 'Both Hours and Amount OK', and 'Either Hours or Amount OK' (selected).

Earnings Table - Earnings Table 1 page

***Permanent/Incidental***

|                   |                                                                                                                                                                                                               |
|-------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Incidental</b> | Select if the payments or deductions cover a closed time period, with a one-time payment or deduction.                                                                                                        |
| <b>Permanent</b>  | Select if the payments or deductions cover a time period with an initial and final date, but where the final date is open and the payment or deduction continues indefinitely until the final date is closed. |
| <b>Both</b>       | Select if the payments or deductions are incidental <i>and</i> permanent.                                                                                                                                     |

***Payment Type***

|                                  |                                                                                                                                                                                                                                                                                                                                                                                          |
|----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Flat Amount</b>               | Select to define an earnings code as a flat amount. Also specify the amount. For example, you might want to give multiple employees a specific flat amount of additional pay. You can maintain this type of flat amount on the Earnings table and make mass changes to the flat amount on the Earnings table, instead of changing multiple additional pay records at the employee level. |
| <b>Unit/Override Rate</b>        | Select and specify a rate if you want to set up your payroll system to override the hourly rate on the employee's job record, or if you want to provide an earnings code for piecework earnings.                                                                                                                                                                                         |
| <b>Hours Only</b>                | Select if you want to enable the entry of hours for earnings.                                                                                                                                                                                                                                                                                                                            |
| <b>Amounts Only</b>              | Select if you want to enable the entry of amounts for earnings.                                                                                                                                                                                                                                                                                                                          |
| <b>Defined by Salary System</b>  | Select if a third-party payroll system defines the way to process the payment for earnings.                                                                                                                                                                                                                                                                                              |
| <b>Both Hours and Amount OK</b>  | Some companies need the ability to enter both hours and an amount for earnings. Use this option to record an employee's hours (for your records only) and to enter the actual amount of pay that you want them to receive.                                                                                                                                                               |
| <b>Either Hours or Amount OK</b> | Select if you want to enable the entry of either hours or amount, but not both, for earnings.                                                                                                                                                                                                                                                                                            |

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**Defining the Adjustment Factors and Tax Classes for Your Earnings Code**

Access the Earnings Table - Earnings Table 2 page.

| Earnings Table 1                                                                     |                      | Earnings Table 2                                                                                                                                                    |        |
|--------------------------------------------------------------------------------------|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| <b>Table 2 Details</b> <span style="float: right;">View All First 1 of 1 Last</span> |                      |                                                                                                                                                                     |        |
| <b>Earnings Code:</b>                                                                | A05                  | Admin Uncontrollable OT 5%                                                                                                                                          |        |
| <b>Effective Date:</b>                                                               | 01/01/1980           | <b>Status:</b>                                                                                                                                                      | Active |
| <b>Rate Adjustment Factor:</b>                                                       | <input type="text"/> | <b>Tax Class</b><br><input checked="" type="radio"/> WT, SS<br><input type="radio"/> WT, NoSS<br><input type="radio"/> NoWT, SS<br><input type="radio"/> NoWT, NoSS |        |
| <b>Hours Adjustment Factor:</b>                                                      | <input type="text"/> |                                                                                                                                                                     |        |
| <b>Multiplication Factor:</b>                                                        | 0.0500               |                                                                                                                                                                     |        |
| <b>Earnings Adjustment Factor:</b>                                                   | <input type="text"/> |                                                                                                                                                                     |        |
| <b>Maximum Yearly Earnings:</b>                                                      | <input type="text"/> |                                                                                                                                                                     |        |

## Earnings Table - Earnings Table 2 page

**Rate Adjustment Factor** The amount that applies to adjustments in pay rates. For example, if your collective labor agreement included an hourly cost of living adjustment, enter the value in this field for any applicable earnings (such as regular, overtime, vacation, and sick). Any employee getting this type of earnings is paid that hourly amount in addition to the compensation rate specified on their job record.

**Hours Adjustment Factor** Enables you to indicate the adjustment to the number of hours associated with an earnings code, such as 40 hours for regular earnings. This can be either a positive or negative number.

**Multiplication Factor** Used to calculate hourly earnings, such as overtime or double time, for which a specific number or factor (such as 1.5 or 2.0 for double time) multiplies the earnings for overtime.

**Earnings Adjustment Factor** If you want to indicate a specific amount that doesn't affect pay rate or hours, enter it as a flat amount here. Use this type of definition for earnings codes for which the amount always remains the same for all employees, such as an ANG 50.00 Christmas bonus. When you set up this type of earnings, also set the multiplication factor to zero.

**Maximum Yearly Earnings** Enter a value to set a yearly ceiling on the earnings code.

**Tax Class**

**Tax Class** To specify the tax class that applies to this earnings code, select from the appropriate options.

**WT, SS** (wage taxes, social security premiums) For wage taxes, social security premiums.

**WT, NoSS** (wage taxes, no social security premiums) For wage taxes, no social security premiums or doesn't apply.

|                                                                |                                                                                   |
|----------------------------------------------------------------|-----------------------------------------------------------------------------------|
| <b>NoWT, SS</b> (no wage taxes, social security premiums)      | For no wage taxes or doesn't apply, social security premiums.                     |
| <b>NoWT, NoSS</b> (no wage taxes, no social security premiums) | For no wage taxes or doesn't apply, no social security premiums or doesn't apply. |

---

## Reviewing Earnings Codes

Use the Earnings report to review all the earnings codes established with the payroll calculation characteristics that you assign to each.

### See Also

*PeopleSoft Application Fundamentals for HRMS PeopleBook*, “Appendix: PeopleSoft Application Fundamentals for HRMS Reports,” Generating an Earnings Report

---

## Building Earnings Programs

After you define earnings codes, establish earnings programs on the Earnings Program table. An earnings program is a set of valid earnings codes for one or more pay groups. A single company may have any number of earnings programs. An individual employee may belong to only one earnings program, based upon his or her pay group, and the codes for that program are the only valid earnings codes for that employee.

For example, executives ordinarily do not get overtime pay, so their pay group's earnings program shouldn't include overtime as a valid earnings code. You might also want to exclude part-time employees who work less than 30 hours a week from holiday pay eligibility.

Normally, employees are assigned to earnings programs through their pay group. The earnings program that you enter on the Company Table - Default Settings page becomes the default earnings program for the pay groups that you set up on the Pay Group table. To override this default, specify a different earnings program for a pay group on the Setting Up Pay Groups for Salary Administration. You cannot override the pay group earnings program at the employee level if an employee belongs to a certain pay group.

---

## Setting Up an Earnings Program

Access the Earnings Program Table page.

Earnings Program Table

Earnings Program ID: ES

**Earnings Details** View All First 1 of 1 Last

\*Effective Date: 01/01/1984 \*Status: Active

\*Description: Senior Executive Schedule

Short Description: SES

**Earnings Code** View All First 1 of 1 Last

\*Earnings Code

+

-

Earnings Program Table page

**Earnings Code** Select each earnings code that you want in the program.  
Insert additional data rows if necessary.

## Establishing Work Shifts and Defining Shift Differential Pay

Access the Shift Table page.

Shift Table

SetID: LBH Biweekly Hourly Paygroup

Shift: 1

**Shift Table Information** Find View All First 1 of 1 Last

\*Effective Date: 01/01/1980 \*Status: Active

Description: First Shift

Short Description: 1st shift

Shift Hours: 8 : to 15 : 59

**Employee Shift Differential?**

☒ Specified at Employee level

Rate:

Factor:

Shift Table page

**Shift Hours** The **Shift Hours** time format uses a 24-hour clock, so if you're setting up a shift from 8 a.m. to 4 p.m., enter **8:00** to **16:00**.

|                                    |                                                                                                                                                                                                  |
|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Specified at Employee level</b> | If shift premiums vary from employee to employee, select this check box, which enables you to define the shift premium rate or factor for employees assigned to the shift at the employee level. |
| <b>Rate</b>                        | If you didn't select <b>Specified at Employee Level</b> , enter the rate. At the employee level, use the Shift/Rate/Factor fields on Job Data - Job Information page.                            |
| <b>Factor</b>                      | If you didn't select <b>Specified at Employee Level</b> , enter the factor. At the employee level, use the Shift/Rate/Factor fields on Job Data - Job Information page.                          |

## Defining Benefits and Other Deductions

An employee's benefits program usually involves deductions from pay, such as a contribution to a health care program or a pension program. A benefits program is, from a salary administration viewpoint, a collection of various deductions. An employee may also have additional pay deductions, both permanent and incidental. The setup tables documented in this section help you set up standardized benefits' providers, plans, programs, and deductions in your PeopleSoft Human Resources system and make your subsequent data entry easier and more efficient.

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### Specifying How Deductions Are Processed

Deductions comprise all payroll deductions for benefit plans and other general payments, not including taxes. There are two basic types of deductions: benefits deductions and general deductions. We refer to deductions for taxes as *taxes*. When setting up deductions in PeopleSoft Human Resources, remember that there are two parts to defining a deduction.

|                               |
|-------------------------------|
| <b>To define a deduction:</b> |
|-------------------------------|

1. Use the Setting Up Permanent and Incidental Deductions for Tax Purposes to specify, for all benefits deductions and general deductions, whether a deduction is permanent or incidental and how the deduction affects taxes.
2. Define the actual calculation of a deduction on the Setting Up General Deduction Data or on the Benefits tables, depending on the type of deduction that you specify.

Use the General Deduction Table page for non-benefit deductions, such as parking fees, union dues, or garnishments. Use the Benefits tables for benefit deductions, such as those for medical and life insurance plans. For each entry on the General Deduction Table page or in the Benefits table, there should be a corresponding entry on the Deduction Table page.

## Pages Used to Define Benefits and Other Deductions

| <b>Page Name</b>                                                                     | <b>Object Name</b> | <b>Navigation</b>                                                                                         | <b>Usage</b>                                                                                                                                                                                                                                                             |
|--------------------------------------------------------------------------------------|--------------------|-----------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Deduction Table                                                                      | DEDUCT_TABLE1_NL   | Define Business Rules, Define General Data (NLD), Setup, Deduction Table, Deduction Table                 | Specify, for all benefits deductions and general deductions, whether a deduction is permanent or incidental and how the deduction affects taxes.                                                                                                                         |
| General Deduction Table                                                              | GENL_DEDUCT_TBL_NL | Define Business Rules, Define General Data (NLD), Setup, General Deduction Table, General Deduction Table | Define general deductions.                                                                                                                                                                                                                                               |
| Provider Table - Vendor Information                                                  | VNDR_ID1           | Define Business Rules, Define General Data (NLD), Setup, Provider/Vendor Table                            | Add a new provider                                                                                                                                                                                                                                                       |
| Provider Table - Addresses                                                           | VNDR_ADDRESS       | Define Business Rules, Define General Data (NLD), Setup, Provider Table                                   | Add an address for a new provider.                                                                                                                                                                                                                                       |
| Benefit Plan Table                                                                   | BENEFIT_PLAN_TABLE | Define Business Rules, Define General Data (NLD), Setup, Benefit Plan Table                               | Add a benefit plan definition.                                                                                                                                                                                                                                           |
| Coverage Code Tbl (coverage code table) page                                         | COVRG_CD_TBL       | Define Business Rules, Define General Data (NLD), Setup, Coverage Codes.                                  | Add new coverage codes. PeopleSoft suggests that you give the coverage code a numerical value. The delivered coverage codes have numerical values of 1 through 7. Coverage codes should be ordered according to their complexity, with <i>Employee Only</i> being first. |
| Benefit Program Tbl - Benefit Program (benefit program table - benefit program) page | BEN_PROG_DEFN1     | Define Business Rules, Define General Data (NLD), Setup, Benefit Program Tbl                              | Define basic benefit program information.                                                                                                                                                                                                                                |

| Page Name                                                                                      | Object Name    | Navigation                                                                               | Usage                                                                                                                                          |
|------------------------------------------------------------------------------------------------|----------------|------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| Benefit Program Tbl - Plan Type and Option (benefit program table - plan type and option) page | BEN_PROG_DEFN2 | Define Business Rules, Define General Data (NLD), Setup, Benefit Program Tbl             | Link plan types to the benefit program and to add important information about plan types.                                                      |
| Benefit Program Tbl - Cost (benefit program table - cost) page                                 | BEN_PROG_DEFN3 | Define Business Rules, Define General Data (NLD), Setup, Benefit Program Tbl             | Link a benefit program and plan type to rate and calculate rules. Use the outer scroll bar to enter information about more than one plan type. |
| Prog. Clone Util. (benefit program clone utility) page                                         | BN_CLONE       | Define Business Rules, Define General Data (NLD), Process, Benefit Program Clone Utility | Identify a benefit program and have the system make an exact copy of that program with a different effective date.                             |

## Setting Up Permanent and Incidental Deductions for Tax Purposes

Access the Deduction Table page.

The screenshot displays the 'Deduction Table' page. At the top, it shows 'Plan Type: 00 General Deduction' and 'Deduction Code: KCAVPB'. Below this is a 'Deduction Details' section with a 'View All' button and navigation controls. The 'Effective Date' is set to '01/01/1980'. The 'Description' is 'Advance Payback' and the 'Short Description' is 'AdvPayBack'. There are two main sections: 'Permanent/Incidental' with radio buttons for 'Incidental', 'Permanent', and 'Both' (selected); and 'Tax Class' with radio buttons for 'WT, SS' (selected), 'WT, NoSS', 'NoWT, SS', and 'NoWT, NoSS'.

Deduction Table page

**Note.** Deductions on the Deduction table are grouped by plan type. The plan type code for general deductions is always **00**. Benefit deduction plan type codes vary depending on the nature of the benefit, but are already coded into the system as translate values. If you want to create plan types, use **Z0** through **ZZ**. You must also ensure that the deduction codes that you create are the same that you use in the General Deduction table and the Benefits tables.

***Permanent/Incidental***

Use this group box to indicate whether the deduction code that you are defining is incidental, permanent, or both.

|                   |                                                                                                                                                                                                                                      |
|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Incidental</b> | For one-time payments or deductions, like a bonus, that occur during a specific and closed time period.                                                                                                                              |
| <b>Permanent</b>  | Select this option (or semipermanent) for payments or deductions that occur during a time period with a set initial date and an open-ended final date. The payments or deductions continue indefinitely until the final date closes. |
| <b>Both</b>       | Select if the payments or deductions are incidental and permanent.                                                                                                                                                                   |

***Tax Class***

Use this group box to specify the tax class that applies to this earnings code.

|                   |                                                                                     |
|-------------------|-------------------------------------------------------------------------------------|
| <b>WT, SS</b>     | For wage taxes, Social Security premiums.                                           |
| <b>WT, NoSS</b>   | For wage taxes, no Social Security premiums or does not apply.                      |
| <b>NoWT, SS</b>   | For no wage taxes or does not apply, Social Security premiums.                      |
| <b>NoWT, NoSS</b> | For no wage taxes or does not apply, no Social Security premiums or does not apply. |

---

**Defining General Deductions**

In PeopleSoft Human Resources, a general deduction is any deduction, permanent or incidental, which isn't a benefit deduction. Charitable deductions, union dues, parking fees, garnishments, bonds, and so forth all fit into this category.

Use the General Deduction Table page to define how these nonbenefit deductions are calculated (for benefit deductions you use one of the benefits tables).

For general deductions, you do not have to specify a plan type because it is always 00 (zero zero). However, you need to create a matching entry on the Setting Up Permanent and Incidental Deductions for Tax Purposes that contains a plan type of 00 and the same deduction code that you enter on this table.

---

**Setting Up General Deduction Data**

Access the General Deduction Table page.

| General Deduction Table                                                                                                               |                                                  |
|---------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|
| <b>Deduction Code:</b>                                                                                                                | KN0001                                           |
| <b>Description:</b>                                                                                                                   | Staff Association Contribution                   |
| <b>Deduction Details</b> <span style="float: right;">View All First 1 of 1 Last</span>                                                |                                                  |
| <b>*Effective Date:</b>                                                                                                               | 01/01/1980                                       |
| <b>Deduction Rate or %:</b>                                                                                                           |                                                  |
| <b>Deduction Calculation Routine</b> <span style="float: right;">+ -</span>                                                           |                                                  |
| <input checked="" type="radio"/> Flat Amount<br><input type="radio"/> Percentage<br><input type="radio"/> Calculated by Salary System |                                                  |
| <b>Amount Per Pay Period</b> <span style="float: right;">View All First 1 of 1 Last</span>                                            |                                                  |
| <b>*Pay Frequency:</b>                                                                                                                | M Monthly <span style="float: right;">+ -</span> |
| <b>Deduction Flat/Addl Amount:</b>                                                                                                    | \$15.00                                          |

### General Deduction Table page

#### Deduction Calculation Routine

For each general deduction, indicate the type of deduction calculation routine that your payroll system uses to determine the amount of the deduction. If you select a deduction calculation routine that uses a **Deduction Rate or %**, also enter a **Flat/Addl Amount Per Pay Period** to be deducted. However, you need to indicate the amount here only if it's the same for all employees within a pay frequency.

#### Flat Amount

Select if the deduction calculation is for a flat amount. Enter the amount in the **Flat/Addl Amount Per Pay Period** field.

#### Percentage

Select if the deduction calculation is for a percentage. Enter the percentage in the **Deduction Rate or %** field.

#### Calculated by Salary System

Select if the deduction is calculated by the payroll system.

#### Amount Per Pay Period

Select an amount to be deducted from an employee's pay every pay period.

#### Pay Frequency

If you have a deduction that varies by pay frequency, indicate the amount deducted in each pay period for each pay frequency. For example, if there is a ANG 50.00 per month parking deduction for the company GBI, set up the deduction for the semimonthly pay group *KN2* so that it applies only to the last pay period of the month. Rather than taking out ANG 25.00 each pay period, take the full ANG 50.00 at the end of the month. To set this up, indicate both the frequency and amount.

#### Deduction Flat/Addl Amount (flat deduction/additional amount)

If you select a **Deduction Calculation Routine** that uses a **Flat Amount**, enter a flat amount or additional deduction amount. However, indicate the amount here only if it's the same for all employees within a pay frequency.

## Company General Deductions

The Setting Up General Deduction Data contains the codes that classify all payroll deductions that do not fit into a category covered by a benefit table, such as loan payments, cash, advance settlements, union dues, and parking fees. Your PeopleSoft Human Resources system provides two Structured Query Report (SQR) reports for reviewing the valid deduction codes that are entered into the system.

The Deductions report (INT005NL) provides an overview of the different deductions defined in the system. This Structured Query Report (SQR) report is sorted by plan type, deduction code, and effective date. It prints the classification codes that you set up for each plan type on the Setting Up Permanent and Incidental Deductions for Tax Purposes.

The purpose of the General Deduction/Frequency report (INT006NL) is to provide information about valid general deduction codes that you entered into the system. The report shows the calculation type code for each deduction and, where applicable, the flat rate or percentage, the employee pay frequency, and any additional flat deduction amounts.

### See Also

“Entering Benefits and Deductions,” Establishing Employee General Deductions

*PeopleSoft Application Fundamentals for HRMS PeopleBook*, “Setting Up Vendors”

## Defining Benefit Plans

Every benefit plan in PeopleSoft is distinguished by a unique combination of plan type and plan name. Plan type is important because our system uses it to distinguish health insurance plans, for example, from life insurance plans.

Plan types are assigned a numerical value and are divided up into categories based upon those values. For example, all health-related plan types begin with a *I*. Therefore, the system recognizes all plan types in the range of 10–19 as health plans. After that come the life insurance plans, with plan type values of 20–29, and so on.

For each category that PeopleSoft delivers, you can add types that include a letter value, as long as you begin with the correct series identification. For example, all health plan types must start with a *I*, so you can add plan types with values from 1A to 1Z. A value of 2Z wouldn’t work as a health plan type but could be used for a new life insurance plan type.

Because we add plan types starting from the beginning of the alphabet, we recommend that you start with Z and work backward to A. If you use a plan type in the range of 10–19 and 1A–1Z, the system recognizes it as a health plan type.

The plan type series delivered by PeopleSoft Human Resources are as follows:

| <b>Plan Type Numbers</b> | <b>Plans</b>         |
|--------------------------|----------------------|
| 10–19, 1A–1Z             | Health plans         |
| 20–29, 2A–2Z             | Life insurance plans |

| <b>Plan Type Numbers</b> | <b>Plans</b>                                      |
|--------------------------|---------------------------------------------------|
| 30–39, 3A–3Z             | Disability plans                                  |
| 40–49, 4B–4Z             | Savings plans                                     |
| 4A                       | ESPP (employee stock purchase plans)              |
| 50–59, 5B–5Z             | Leave plans                                       |
| 5A                       | Company car (European organizations only)         |
| 60–69, 6A–6Z             | Flexible spending account plans (U.S. and Canada) |
| 70–79, 7A–7Z             | Retirement plans (United States)                  |
| 80–89, 8A–8Z             | Pension plans (U.S. and Canada)                   |
| 90–99, 9A–9Z             | Vacation buy/sell plans                           |

We recommend that you work within the delivered plan type series. If you add plan types that do not conform to the delivered series, update the associated processing logic.

The plan types delivered by PeopleSoft Human Resources are as follows:

| <b>Plan Type</b> | <b>Description</b>   | <b>Plan Type</b> | <b>Description</b>                        |
|------------------|----------------------|------------------|-------------------------------------------|
| 10               | Medical              | 4A               | ESPP                                      |
| 11               | Dental               | 50               | Sick leave                                |
| 12               | Medical/Dental       | 51               | Vacation leave                            |
| 13               | Major medical        | 52               | Personal leave                            |
| 14               | Vision/Hearing       | 53               | FMLA leave                                |
| 15               | Nonqualified medical | 5A               | Company car (European organizations only) |
| 16               | Nonqualified dental  | 60               | Health care - FSA                         |
| 17               | Nonqualified vision  | 61               | Dependent care - FSA                      |
| 20               | Life                 | 62               | Legal - FSA                               |
| 21               | Supplemental life    | 65               | Canadian health care                      |
| 22               | AD/D                 | 66               | Canadian retirement counseling            |
| 23               | Life and AD/D        | 70               | PERS                                      |
| 24               | Dependent AD/D       | 80               | Standard pension (Canadian)               |
| 25               | Dependent life       | 81               | Supplementary pension (Canadian)          |

| <i>Plan Type</i> | <i>Description</i>    | <i>Plan Type</i> | <i>Description</i>  |
|------------------|-----------------------|------------------|---------------------|
| 26               | Survivor income       | 82               | USDB Pension Plan 1 |
| 30               | Short-term disability | 83               | USDB Pension Plan 2 |
| 31               | Long-term disability  | 84               | USDB Pension Plan 3 |
| 40               | 401(K)                | 85               | USDB Pension Plan 4 |
| 41               | Profit sharing        | 86               | USDB Pension Plan 5 |
| 42               | Thrift                | 87               | USDB Pension Plan 6 |
| 43               | IRA                   | 90               | Vacation buy        |
| 44               | Capital accumulation  | 91               | Vacation sell       |
| 45               | U.S. Savings Bonds    |                  |                     |

The first step in defining a benefit plan is to name the plan and identify the plan type through the Benefit Plan table. Also use this table to define providers, provider group codes, and default deduction codes for all plan types.

### See Also

Defining Benefits and Other Deductions

## Setting Up Benefit Plan Definitions

Access the Benefit Plan Table page.

Benefit Plan Table

Plan Type: 15 Domestic Partner Medical Benefit Plan: KUHMO3

Benefit Plans Find | View All First 1 of 1 Last

\*Effective Date: 01/01/1980

\*Description: DP Medical HMO Plan 3 Short Description: DP HMO 3

SetID: SHARE Vendor ID: USAKUTCARE TakeCare

Group Number: SPD URL Id:

Default Deduction Code: KUHMO1 Domestic Partner TakeCare

Pay Mode

Pay Mode: Pay as Deducted

AP Payment Date Type: Check Date

Self-Service Plan Description:

Benefit Plan Table page

|                                                                             |                                                                                                                                                                                                                                                             |
|-----------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>SetID</b>                                                                | Select a setID for the vendor to be used.                                                                                                                                                                                                                   |
| <b>Vendor ID</b>                                                            | If the provider is not on the list, use the Provider/Vendor Table to add it.                                                                                                                                                                                |
| <b>Group Number</b>                                                         | Defined on the Provider Policy Table.                                                                                                                                                                                                                       |
| <b>SPD URL Id</b>                                                           | PeopleSoft eBenefits application to provide access to the summary plan description on the Provider Policy Table.                                                                                                                                            |
| <b>Default Deduction Code</b>                                               | Optional.<br><br>Entering a default code saves you from typing the deduction code each time that you associate this benefit plan with a benefit program on the Benefit/Deduction Program Table. (Deduction codes are created on the Deduction Code Table.)  |
| <b>Minimum Spousal Allocation %</b> (minimum spousal allocation percentage) | Certain qualified plans in the life, savings, or pension category have mandated lower limits on the percentage amount that must be assigned to a spouse. Enter that amount here and the system enforces or monitors compliance with this beneficiary right. |
| <b>Include in Nondiscrimination Testing</b>                                 | Available only to plan types in the 40-series (savings plans).                                                                                                                                                                                              |
| <b>Separate AP Payment</b>                                                  | Select to create a separate voucher for each deducted amount payable to the vendor.                                                                                                                                                                         |
| <b>Self-Service Plan Description</b>                                        | Used only for health (1x), disability (3x), leave (5x), and retirement (7x) plans. Enter text describing the benefit plan, to appear on PeopleSoft eBenefits application pages.                                                                             |

**Pay Mode**

Fields in this group box are for use with PeopleSoft Payroll for North America only.

**See Also**

Defining Benefits and Other Deductions

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**Creating Benefit Coverage Codes**

Define and manage coverage codes for your benefit programs on the Coverage Codes Tbl (coverage codes table) page. Attach these coverage codes to your benefit plan options (usually life and AD/D plans) through the Plan Type and Option page of the Benefit/Deduction Program table. PeopleSoft delivers seven basic coverage codes; you can add or delete coverage codes as the needs of your organization and workforce dictate.

Access the Coverage Code Tbl page.

Coverage Code Tbl

Coverage Code: 3

Coverage Codes Find | View All First 1 of 1 Last

+ -

\*Effective Date: 01/01/1900

\*Status: Active

\*Description: Employee + Dependents

Short Description: Empl+Deps

Min No of Dependents Allowed: 1 \*Dependent Coverage: Spouse Not Allowed

Max No of Dependents Allowed: 99 \*Non Qualified Dep Coverage: Not Allowed

COBRA Coverage Set:

Coverage Code Tbl page

### Coverage Code

The coverage code.

**Min No of Dependents Allowed** (minimum number of dependents allowed)

The minimum number of dependents allowed under this coverage code. If there is no limit to the number of dependents allowed, enter **99**.

### Spouse Coverage

Indicate whether spouses are not allowed, allowed, or required by this coverage code:

**Not Allowed:** The delivered coverage codes either don't allow the participant to have a spouse or require the participant to have a spouse.

**Allowed:** Define a coverage code with a **Spouse Coverage** of **Allowed** only if you don't want the coverage code to require that one of the dependents be a spouse.

**Required:** The delivered coverage codes either don't allow the participant to have a spouse or require the participant to have a spouse.

**Max No of Dependents Allowed** (maximum number of dependents allowed)

Define the maximum number of dependents allowed under the coverage code. If there is no limit to the number of dependents allowed, enter **99**.

**Non-Qualified Dep Coverage** (nonqualified dependent coverage)

Not used for operations in the Netherlands.

## Building Benefit Programs

After you set up your deductions and benefits, establish benefit programs on the Benefit Program table. A benefit program is a set of benefits and deductions that is valid for an employee or group of employees. A single company may have any number of programs, and an employee with concurrent jobs may have multiple benefit programs. Therefore, when you

set up a benefit program, you are defining which benefits and deductions are valid for the employees enrolled in the program.

Use the Benefit Program Table pages to build your benefit programs: Establish a program, link the appropriate plan types to it, and associate a variety of rules with it. There are three Benefit Program Table pages:

- Benefit Program
- Plan Type and Option
- Cost

To keep your benefit program accurate and consistent, the calculation rules and options must be individually effective-dated in a coherent, logical manner. If they aren't, your benefit program is open to a variety of errors as historical records get shuffled and benefits data lost. Plans associated with a benefit program cannot be in effect unless their effective dates are set on or after the effective date of the benefit program. Similarly, the rates and calculation rules that you associate with the plans cannot be in effect unless their effective dates are set on or after the dates of the plans to which they're linked. If a benefit program and benefit plan combination isn't effective when you think it should be, check the effective dates of the benefit program and the benefit plan. The effective date of the benefit plan must be less than or equal to the effective date of the benefit program.

## Establishing Basic Benefit Program Data

Access the Benefit Program Tbl - Benefit Program (benefit program table - benefit program) page.

| Benefit Program                                                    |                   | Plan Type and Option                                               | Cost      |
|--------------------------------------------------------------------|-------------------|--------------------------------------------------------------------|-----------|
| <b>Benefit Program:</b>                                            | B01               |                                                                    |           |
| <b>Effective Date:</b>                                             | 01/01/1998        | <b>Status as of Effective Date:</b>                                | Active    |
| <b>*Description:</b>                                               | BAS Eligibility 1 | <b>Program Type:</b>                                               | Automated |
| <b>Short Description:</b>                                          | BAS Elig 1        | <b>Currency Code:</b>                                              | USD       |
| <b>Dependent Limits</b>                                            |                   | <b>Benefits Administration</b>                                     |           |
| <b>Dependent Age Limit:</b>                                        | 18                | <b>Apply Excess Credits to:</b>                                    | Cash      |
| <b>Student Age Limit:</b>                                          | 22                | <b>FSA</b>                                                         |           |
| <input checked="" type="checkbox"/> Exclude Disabled from Age Lmt. |                   | <b>Flexible Spending Acct Run ID:</b>                              |           |
| <input checked="" type="checkbox"/> Dep Ineligible if Married      |                   | <b>FSA Minimum Check Amount:</b>                                   | 0.00      |
|                                                                    |                   | <b>FSA Maximum Annual Pledge:</b>                                  | 7000.00   |
| <b>COBRA</b>                                                       |                   | <b>Self-Service Configuration</b>                                  |           |
| <b>COBRA Surcharge %:</b>                                          |                   | <input checked="" type="checkbox"/> Show Credits on Enrollmnt Form |           |
| <b>COBRA Disabled Surcharge %:</b>                                 |                   | <input type="checkbox"/> Include Can Sales Tax on Form             |           |
| <b>FMLA</b>                                                        |                   | <b>Cost Freq on Enrollment Form:</b>                               | Annual    |
| <b>FMLA Plan ID:</b>                                               | KUB               | <b>Handbook URL ID:</b>                                            |           |
|                                                                    | Roll-Bkwd         |                                                                    |           |

Benefit Program Tbl - Benefit Program page

|                        |                                                                                                                                                                                                                                                                                                                                                                                                          |
|------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Benefit Program</b> | The program that you uses to access the page.                                                                                                                                                                                                                                                                                                                                                            |
| <b>Program Type</b>    | <p>The program type is set when you first build the benefit program. Set <b>Program Type</b> to <i>Manual</i>.</p> <p>If, when you create the <b>Benefit Program</b>, you are using PeopleSoft Benefits Administration in association with the Base Benefits business process, and have Benefits Administration selected in the Installation table, set the <b>Program Type</b> to <i>Automated</i>.</p> |
| <b>Currency Code</b>   | The type of currency the program uses for this program's benefit and deduction calculations.                                                                                                                                                                                                                                                                                                             |

### Dependent Limits

|                                                                         |                                                                                                                                   |
|-------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| <b>Dependent Age Limit</b>                                              | Enables you to set a maximum age limit that, once reached, indicates that a dependent is no longer eligible for coverage.         |
| <b>Student Age Limit</b>                                                | Enables you to set a maximum age limit that, once reached, indicates that a dependent can no longer be covered by student status. |
| <b>Exclude Disabled from Age Lmt.</b> (exclude disabled from age limit) | Enables you to exclude disabled dependents from the maximum dependent limits.                                                     |
| <b>Dep Ineligible if Married</b> (dependent ineligible if married)      | Indicates that dependents who are married aren't eligible for coverage under the benefits program.                                |

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**Important!** All of the fields in the **COBRA, Benefits Administration, FSA, and FMLA** group boxes are for Canadian and United States functionality and are not for operations in The Netherlands.

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### Linking Benefits Programs to Plan Types

Access the Benefit Program Tbl - Plan Type and Option (benefit program table - plan type and option) page.

Benefit Program   Plan Type and Option   Cost

Benefit Program: KB1   Effective Date: 01/01/1980

**Plan Type**   Find | View All   First 1 of 5 Last

\*Plan Type: 10 Medical   Minimum Annual Contribution: 0.00 + -

DispPlnSeq: 10   Maximum Annual Contribution: 0.00

Event Rules ID:   ☐ HIPAA Plan

Waive Coverage: N Not Allowed   ☐ COBRA Plan   Load Cross Plan Values

► Self-Service Configuration

**Option**   Find | View All   First 1-2 of 2 Last

Eligibility   Cross Plan

| Optn ID | *Optn Type | Benefit Plan | Covrg Code | Deductn Cd | Option Default Code | Option Level Seq | Geog Locn | Elig ID |
|---------|------------|--------------|------------|------------|---------------------|------------------|-----------|---------|
| 5       | 0          | KNMED        | 1          | KN1001     |                     |                  |           | + -     |
| 13      | 0          | KNMED        | 4          | KN1001     |                     |                  |           | + -     |

Benefit Program Tbl - Plan Type and Option page

### Benefit Program

The program that you uses to access this page.

### Plan Type

Select a plan type from the values, which come from the Benefit Program Table – Plan Type and Option Page. By adding rows, you can use this page to enter information for each plan type associated with a particular **Benefit Program**.

**Plan Type 01**, also called the program level of the benefit program, is used only by benefit programs that run in association with PeopleSoft Benefits Administration.

### Waive Coverage

If the **Plan Type** allows it, you may indicate the option to **Waive Coverage**.

---

Important! The DisPlnSeq, Event Rules ID, COBRA Plan, HIPAA Plan, Minimum Annual Contribution, and Maximum Annual Contribution, Load Cross Plan Values elements, as well as the fields in the Self-Service Configuration group box, are for Canadian and United States functionality and are not for operations in The Netherlands.

---

### Option

As you define options for each of your offered plan types, the system automatically enters the **Optn ID** (option ID). Each option row needs to have an **Opt Typ** (option type) designation. The option type that you select determines the remaining fields that you need to complete on the Benefit/Deduction Program Table pages 2 and 3.

**Opt Typ**

**D** (general deduction): Allowed only for Plan Type **00**, which you use for general deductions.

**O** (option): At least one **O** is required for each plan type except **01**.

**G** (general credit): Used only in benefit programs run in association with PeopleSoft Benefits Administration.

**P** (program): Used only in benefit programs run in association with PeopleSoft Benefits Administration.

**W** (waive): Used only in benefit programs run in association with PeopleSoft Benefits Administration.

**Benefit Plan**

Enter the code for a benefit plan that was defined on the Benefit Plan Table.

**Cvg CD** (coverage code)

Indicate the level of coverage for health plan types (1x). This is a required field for those plan types.

**Deductn Cd** (deduction code)

Indicate how to handle deductions.

---

**Important!** The **Opt Seq** (option sequence), **Opt Cd** (option code), **Optn Lvl** (option level), **Geog Locn** (geographic location), and **Elig ID** (eligibility rules ID), fields are all used for PeopleSoft Benefits Administration and are not for operations in The Netherlands.

---

## Linking Benefits Programs to Rate and Calculate Values

Access the Benefit Program Tbl - Cost (benefit program table - cost) page.

Benefit Program Tbl - Cost page

|                      |                                                                                                                                                                                        |
|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Option Id</b>     | Displays the <b>Option Id</b> information that you entered for each <b>Plan Type</b> . For each <b>Plan Type</b> , use the scroll arrows to navigate between the <b>Option Ids</b> .   |
| <b>Option Type</b>   | Displays the <b>Option Type</b> information that you entered for each <b>Plan Type</b> . For each <b>Plan Type</b> use the scroll arrows to navigate between the <b>Option Ids</b> .   |
| <b>Benefit Plan</b>  | Displays the <b>Benefit Plan</b> information that you entered for each <b>Plan Type</b> . For each <b>Plan Type</b> use the scroll arrows to navigate between the <b>Option Ids</b> .  |
| <b>Coverage Code</b> | Displays the <b>Coverage Code</b> information that you entered for each <b>Plan Type</b> . For each <b>Plan Type</b> use the scroll arrows to navigate between the <b>Option Ids</b> . |
| <b>Cost Type</b>     | Enter a <b>Cost Type</b> : <i>Price</i> , <i>Credit</i> , or <i>None</i> .                                                                                                             |
| <b>Rate Type</b>     | Enter a <b>Rate Type</b> to specify which table should be used to determine rates for the plan type.                                                                                   |

---

**Important!** The **Rate TblID**, **Earn Code**, **Cost ID**, and **Calc TblID** fields are all used for PeopleSoft Benefits Administration and are not for operations in the Netherlands.

---

## Using the Benefit Program Clone Utility

Access the Prog. Clone Util. (benefit program clone utility) page.

Give the duplicate program the same name as the original or rename it, which saves you time and effort when you need to create a new benefit program with a future effective date.

The screenshot shows the 'Prog. Clone Util.' page. At the top, there is a 'Run Control ID' field with the value '01' and a 'Language' dropdown menu set to 'English'. To the right of these fields are links for 'Report Manager' and 'Process Monitor', and a yellow 'Run' button. Below these fields, the page is divided into two main sections: 'Current Benefit Program' and 'New Benefit Program'. The 'Current Benefit Program' section contains fields for 'Benefit Program' (with value 'KN1') and 'Effective Date' (with value '01/01/1980'). The 'New Benefit Program' section contains fields for 'New Benefit Program' (with value 'KB1') and 'New Effective Date' (with value '01/01/1980').

Prog. Clone Util. Page

**Current Benefit Program**

**Benefit Program** Enter the name of the benefit program that you want to duplicate.

**New Benefit Program**

**New Benefit Program** Enter the benefit program name that you want to create.

**New Effective Date** Enter the effective date for the benefit program that you are creating.

**Run** Click this button to run this request. Process Scheduler runs the benefit program clone process at user-defined intervals.

## Organizing Your Payroll Processes

After you map and define the types of earnings and deductions that you need for your salary administration system, you can organize the information needed by your payroll system to support the processes it runs. In this section, we review the tables that enable you to do the following:

- Group employees to be paid together using pay groups.
- Establish pay calendars that determine when grouped employees should be paid.
- Create pay run IDs to process payrolls more efficiently.

---

### Pages Used in Organizing Your Payroll Process

| <i>Page Name</i>  | <i>Object Name</i> | <i>Navigation</i>                                                         | <i>Usage</i>                                                                                                                                                            |
|-------------------|--------------------|---------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Bank Table page   | BANK_EC            | Define Business Rules, Define General Data (NLD), Setup, Bank/Branch Info | Identify every bank and savings institution where your company has accounts established for payroll purposes, with the exception of employee's direct deposit accounts. |
| Branch Table page | BANK_BRANCH_EC     | Define Business Rules, Define General Data (NLD), Setup, Bank/Branch Info | Identify bank branches for your company.                                                                                                                                |

| <b>Page Name</b>                                                                  | <b>Object Name</b> | <b>Navigation</b>                                                               | <b>Usage</b>                                                                                                                                                                                                                                                      |
|-----------------------------------------------------------------------------------|--------------------|---------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account Code Table page                                                           | ACCT_CD_TABLE      | Define Business Rules, Define General Data (NLD), Setup, Account Code Table     | Assign unique account codes that you can reference in your payroll system and track the distribution of your organization's payments and expenses against budgeted accounts. If you plan to implement extensive account reporting, this table may be quite large. |
| Holiday Schedule page                                                             | HOLIDAY_SCHED_TBL  | Define Business Rules, Define General Data (NLD), Setup, Holiday Schedule Table | Establish a list of scheduled holidays that can be used on the Pay Group table. Holiday schedules that you set up through either navigation can be passed on to a third-party payroll system.                                                                     |
| Pay Group Table - Definition page                                                 | PAYGROUP_TABLE1    | Define Business Rules, Define General Data (NLD), Setup, Pay Group Table        | Create or maintain pay groups.                                                                                                                                                                                                                                    |
| Pay Group Table - Calc Parameters (pay group table - calculation parameters) page | PAYGROUP_TBL3_TBL  | Define Business Rules, Define General Data (NLD), Setup, Pay Group Table        | Enter additional pay group processing parameters, including the bank and account, net pay minimums and maximums, and valid earnings codes.                                                                                                                        |
| Pay Run Table page                                                                | PAY_RUN_TABLE_NLD  | Define Business Rules, Define General Data (NLD), Setup, Pay Run Table          | Establish the valid pay run IDs that you use to combine pay calendar entries from different pay groups for payroll processing.                                                                                                                                    |
| Pay Calendar Table page                                                           | PAY_CAL_TBL_NLD    | Define Business Rules, Define General Data (NLD), Setup, Pay Calendar Table     | Schedule payroll cycles for your pay groups and specify when pay periods begin and end. You must have a calendar entry for every pay period for each pay group that you set up.                                                                                   |

---

## Identifying Bank Codes

The system uses the bank number (or transit number) that you identify here to identify the bank from which checks or electronic funds transfers (direct deposits) are drawn for a pay group. Always create at least one entry on this table for the bank from which paychecks or direct deposits are drawn.

---

**Note.** PeopleSoft recommends not using this table to edit against the bank transit numbers for your employees' direct deposit accounts. If you allow employees to direct deposit to any bank, it would be almost impossible to maintain a table of all valid bank numbers.

---

### See also

*PeopleSoft Application Fundamentals for HRMS PeopleBook*, "Setting Up Banks and Bank Branches," Setting Up Banks and Bank Branches and "Setting Up Local Country Functionality," Loading Dutch Postal Codes

*PeopleSoft Human Resources PeopleBook: Manage Commitment Accounting*, "Commitment Accounting Processing Control Tables," Setting Up Valid Account Codes

---

## Defining Holiday Schedules

Use the Holiday Schedule Table page to establish a list of scheduled holidays to use on the Pay Group table. Do not include personal floating holidays on this list.

Because holidays may vary for different segments of your employee population, depending on location, work schedules, or other factors, you can set up as many holiday schedules on this table as needed. For example, if some employees are paid based on an eight-hour day, and others on a 7.5-hour day, set up a separate holiday schedule for each. The same applies if some employees recognize a holiday on the actual day itself and others on a different date.

### See Also

*PeopleSoft Human Resources PeopleBook: Monitor Absence*, "Setting Up Absence Data, "Assigning and Updating Work and Holiday Schedules

---

## Setting Up Pay Groups

When you implement PeopleSoft Human Resources, one of the major decisions is which pay groups to set up. A pay group gathers a set of employees for payroll processing. Before grouping people into pay groups, consider the following characteristics that all employees must share to be part of the same group:

- Belong to the same company.
- Paid at the same pay frequency.

- Use the same check form or direct deposit advice form.
- Have the same check date.
- Share the same pay period begin and end dates.
- Work in the same country.
- Paid by the same bank.
- Assigned the same work schedule for proration.
- Assigned the same minimum net pay.
- Assigned to the same earnings program.

For example, when setting up pay groups for a fictional company, Global Business Unit (GBI), we grouped employees as follows:

|                         |                                                                                                                                                                                                                            |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>KN1—Monthly</b>      | Employees who are paid monthly and share the same pay period, which ends on the last day of the month, may belong to the same pay group. Salaried employees at GBI are paid monthly.                                       |
| <b>KN2—Semi-Monthly</b> | Employees who are paid semimonthly and share the same pay periods, ending on the 15th and last day of the month, may also belong to the same pay group. Exception hourly and hourly employees at GBI are paid semimonthly. |

Establish pay groups using the three pages in the Pay Group Table. With these pages, you can create pay groups, assign valid pay group employee types, and enter additional bank and earning parameters for your pay groups. Pay groups default to employee job records from the company level.

---

**Important!** The Pay Group Table pages in the system, located outside the **Administer Salaries for the Netherlands** business process, aren't identical to the Pay Group Table pages used for The Netherlands. There are distinct differences in the fields. For users of the **Administer Salaries for the Netherlands** business process, it is important that you use the Pay Group Table pages that appear on the **Define General Data (NLD)** menu.

---

#### **See Also**

*PeopleSoft Application Fundamentals for HRMS PeopleBook*, “Working With Companies,”  
Entering Company Information

## Creating and Maintaining Pay Groups

Access the Pay Group Table - Definition page.

When you first add a pay group, a dialog box prompts you for a company ID and pay group ID. The company ID is a key field on the Pay Group table, implying that all employees in a pay group are also in the same company. Click the prompt arrow on the Company edit box if you're unsure of your company ID, and select from the available values. For the pay group ID, use any three-character alphanumeric ID that conforms to your payroll system standards.

The screenshot shows the 'Pay Group Table - Definition' page. It has two tabs: 'Definition' and 'Calc Parameters'. The 'Definition' tab is selected. The form contains the following fields and values:

- Company:** ACC (State of Accord)
- Pay Group:** PAM
- Effective Date:** 01/01/1990
- Status:** Active
- SetID:** SHARE
- Description:** Accord Monthly
- Short Description:** Acc Mnth
- Country:** USA
- Currency:** USD
- Employee Type Default:** Salaried
- Retiree Pay Group:** ☐
- PI Configuration ID:** (empty)
- Deduction Priority:** (empty)
- Frequency:**
  - \*Pay:** M (Monthly)
  - \*Daily:** D (Daily)
  - \*Monthly:** M (Monthly)
- GL Use:**
  - Rate Type:** OFFIC
  - Conv Date:** C

Pay Group Table - Definition page

### Retiree Pay Group

Select only if you are adding a retiree pay group. This check box is informational only; however, we recommend that you set up a special pay group for retirees because their processing requirements tend to differ from those of active employees.

### PI Configuration ID (payroll interface)

Select an ID for the pay group. The system uses this interface to the external payroll application.

### Deduction Priority

Enter a deduction priority number for your pay group.

### Currency

Select the appropriate currency.

### Employee Type Default

Select the employee type default for the most common employee type within the pay group. When you set up a job record for an employee who is assigned to this pay group, this employee type is set by default to that job record. This employee type is only the default. Values are as follows:

**Hourly:** Employees who do not work the same number of hours each pay period. Typically, an hourly employee requires positive time reporting. In this case, enter on their pay sheets the actual hours worked.

**Exception Hourly:** Employees who work a set number of hours each pay period. Enter exceptions to their schedule on their pay sheets.

**Salaried:** Employees whose earnings are based on an amount per pay period, rather than accumulated hours. You can still enter exceptions on their pay sheets.

**Not Appl** (not applicable): Select this option if the **Employee Type Default** isn't applicable.

### **Frequency**

|                |                                                                                                                                                        |
|----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Pay</b>     | Select the frequency of pay for this pay group: <i>Annual, Biweekly, Daily, Monthly, Quarterly, Semimonthly, and Weekly.</i>                           |
| <b>Daily</b>   | Select the daily frequency to be used by PeopleSoft Human Resources to calculate the daily rate that appears on the Compensation page of Job Data.     |
| <b>Monthly</b> | Select the monthly frequency to be used by PeopleSoft Human Resources to calculate the monthly rate that appears on the Compensation page of Job Data. |

### **GL Use**

The fields in this group box are for Canadian and United States functionality and are not for operations in The Netherlands.

---

## **Setting Up Pay Groups for Salary Administration**

Access the Pay Group Table - Calc Parameters (pay group table - calculation parameters) page.

| Definition                                                                                |                                     | Calc Parameters                      |                                                       |
|-------------------------------------------------------------------------------------------|-------------------------------------|--------------------------------------|-------------------------------------------------------|
| <b>Company:</b>                                                                           | ACC                                 | State of Accord                      |                                                       |
| <b>Pay Group:</b>                                                                         | PAM                                 | Accord Monthly                       |                                                       |
| <b>Paygroup information</b> <span style="float: right;">View All First 1 of 1 Last</span> |                                     |                                      |                                                       |
| <b>Effective Date:</b>                                                                    | 01/01/1990                          | <b>Status:</b>                       | Active                                                |
| <b>Source Bank ID:</b>                                                                    | <input type="text" value="KU01"/>   | State Bank                           |                                                       |
| <b>Minimum Net Pay:</b>                                                                   | <input type="text"/>                |                                      |                                                       |
| <b>*Maximum Net Pay:</b>                                                                  | <input type="text" value="10,000"/> |                                      |                                                       |
| <b>Regulatory Region:</b>                                                                 | <input type="text"/>                | <b>Holiday Schedule:</b>             | <input type="text" value="KU01"/> US Holiday Schedule |
|                                                                                           |                                     | <b>*Regular Hours Earnings Type:</b> | <input type="text" value="REG"/>                      |
|                                                                                           |                                     | <b>*Regular Earns Earnings Type:</b> | <input type="text" value="REG"/>                      |
|                                                                                           |                                     | <b>*OT Hours Earnings Type:</b>      | <input type="text" value="OTP"/>                      |
|                                                                                           |                                     | <b>*Holiday:</b>                     | <input type="text" value="HOL"/>                      |
| <div> <div></div> Canada </div> <hr/> <div> <div></div> Netherlands </div> <hr/>          |                                     |                                      |                                                       |
| <b>Collective Labor Agreement:</b>                                                        |                                     | <input type="text"/>                 |                                                       |

Pay Group Table - Calc Parameters page

|                                    |                                                                                                                                                                                                                                      |
|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Source Bank ID</b>              | For use with PeopleSoft Payroll for North America only.                                                                                                                                                                              |
| <b>Minimum Net Pay</b>             | For use with PeopleSoft Payroll for North America only.                                                                                                                                                                              |
| <b>Maximum Net Pay</b>             | For use with PeopleSoft Payroll for North America only.                                                                                                                                                                              |
| <b>Earnings Program ID</b>         | If you're using PeopleSoft Benefits Administration, select an earnings program ID. This value becomes the default for employee records in this pay group. The other fields in this page are optional for PeopleSoft Human Resources. |
| <b>Regulatory Region</b>           | Enter the regulatory region associated with this pay group.                                                                                                                                                                          |
| <b>Holiday Schedule</b>            | Select a default holiday schedule (optional). The value you enter here appears as the default in employee job data.                                                                                                                  |
| <b>Default Benefit Program</b>     | If you use PeopleSoft Benefits Administration, you can select a default benefit program.                                                                                                                                             |
| <b>Retro Pay Program ID</b>        | For use with PeopleSoft Payroll for North America only.                                                                                                                                                                              |
| <b>Final Check Program ID</b>      | For use with PeopleSoft Payroll for North America only.                                                                                                                                                                              |
| <b>Earnings Types</b>              |                                                                                                                                                                                                                                      |
| <b>Regular Hours Earnings Type</b> | Select the appropriate earnings code for the regular hours earnings type.                                                                                                                                                            |
| <b>Regular Earns Earnings Type</b> | Select the appropriate earnings code for the regular earns earnings type.                                                                                                                                                            |

**OT Hours Earnings Type**  
(overtime hours earnings type)

Select the appropriate earnings code for the OT hours earnings type.

**Holiday**

When the system creates paysheets and detects that a holiday falls within the pay period, it uses the earnings code associated with the **Holiday** field. If the holiday type on the Holiday Schedule table is Canadian, the system uses the holiday earnings code specified on the Pay Group table to set up the holiday earnings on the paysheet.

### **Netherlands**

**Collective Labor Agreement** Select the collective labor agreement: *CAO Retail Trade*, *CAO Wood Industry*, *CAO Medical Staff*, *CAO Metal Industry*, and *CAO Transportation Industry*.

---

**Important!** The **Retro Pay Program ID**, and the **Final Check Program ID** fields are for Canadian and United States functionality and are not for operations in The Netherlands.

---

### **See Also**

*PeopleSoft Application Fundamentals for HRMS PeopleBook*, “Processing Transactions Using Regulatory Regions.”

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## **Reviewing Pay Groups**

Use the Pay Group Table to establish pay groups within your company. A pay group is a set of employees grouped in the same payroll processing frequency because they share the same earnings and deductions. Your PeopleSoft Human Resources system provides a Structured Query Report (SQR), the Pay Groups report, so that you can review an overview of the valid pay groups in the system.

### **See Also**

*PeopleSoft Application Fundamentals for HRMS*, Generating a Pay Groups Report

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## **Establishing Pay Run IDs**

The page and procedures for establishing pay run IDs are the same for some other PeopleSoft payroll applications.

### **See Also**

*PeopleSoft Application Fundamentals for HRMS PeopleBook*, “Using Pay Calendars,” Establishing Pay Run IDs.

## Creating Pay Calendars

Each entry on the Pay Calendar table corresponds to a specific pay period for a pay group, defined by its begin and end dates. So a monthly pay group would have 12 entries on the Pay Calendar table, representing one year of processing.

Access the Pay Calendar Table page.

| Pay Calendar Table                               |                               |                             |                                                                                                          |
|--------------------------------------------------|-------------------------------|-----------------------------|----------------------------------------------------------------------------------------------------------|
| <b>Company:</b>                                  | GBI Global Business Institute |                             |                                                                                                          |
| <b>Pay Group:</b>                                | KN1 Monthly - Netherlands     |                             |                                                                                                          |
| <b>Pay Period End Date:</b>                      | 01/31/2000                    | <b>Pay Run ID:</b>          | KN1-00-01  MhPy 01-00 |
| <b>*Pay Period Begin Date:</b>                   | 01/01/2000                    | <b>Paycheck Issue Date:</b> | 01/24/2000                                                                                               |
| <b>Calendar Year:</b>                            | 2000                          | <b>Month:</b>               | January               |
| <b>Number of workdays:</b>                       | 21                            | <b>Production Code:</b>     |                                                                                                          |
| <b>Text Payment Order:</b>                       |                               |                             |                                                                                                          |
| <input type="checkbox"/> Payroll Calculation Run |                               |                             |                                                                                                          |

Pay Calendar Table page

|                              |                                                                                                                                                                                                                                                                                                                                                    |
|------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Pay Period End Date</b>   | The date on which the pay period ends in the payroll cycle.                                                                                                                                                                                                                                                                                        |
| <b>Pay Run ID</b>            | Each payroll batch process needs a pay run ID to determine which pay group it should process. The system processes all pay calendar entries with the same pay run ID at the same time.<br><br>Before you start payroll processing for a pay period, you must assign a pay run ID on this page. Establish the pay run ID on the Pay Run Table page. |
| <b>Pay Period Begin Date</b> | Select the date on which the pay period begins in the payroll cycle.                                                                                                                                                                                                                                                                               |
| <b>Paycheck Issue Date</b>   | The date that appears on the employee's paycheck or advice slip.                                                                                                                                                                                                                                                                                   |
| <b>Calendar Year</b>         | The calendar year for the pay run.                                                                                                                                                                                                                                                                                                                 |
| <b>Month</b>                 | The month for the pay run.                                                                                                                                                                                                                                                                                                                         |
| <b>Number of workdays</b>    | The number of workdays in the pay period for this pay run.                                                                                                                                                                                                                                                                                         |
| <b>Production Code</b>       | (For informational purposes only.) Your third-party payroll system uses this field for information for the specific payroll run or for printing on the final pay slip.                                                                                                                                                                             |

**Text Payment Order** (For informational purposes only.) Your third-party payroll system uses this field for including information for the specific payroll run or for printing on the final pay slip.

**Payroll Calculation Run** Select this check box, if applicable.

**See Also**

*PeopleSoft Application Fundamentals for HRMS PeopleBook*, “Using Pay Calendars,” Understanding Pay Calendars and Pay Run IDs

## Establishing Additional Benefits Features

We previously discussed how you define your organization’s benefit plans, programs, and providers. We also discussed how, in the context of payroll processing, employee benefits represent deductions from an employee’s pay. The following additional benefits-related tables enable you to enter details about leave plans, pension plans, insurance rates, and coverage groups.

### Pages Used in Establishing Additional Benefits Features

| <b>Page Name</b>              | <b>Object Name</b> | <b>Navigation</b>                                                              | <b>Usage</b>                                                                                                                                                            |
|-------------------------------|--------------------|--------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Leave Plans                   | LEAVE_PLAN_TABLE   | Define Business Rules, Define General Data (NLD), Setup, Leave Plan Table      | Enter basic plan data for your organization’s leave plans.                                                                                                              |
| Pension Plan Table            | PENS_PLAN_TABLE_US | Define Business Rules, Define General Data (NLD), Setup, Pension Plan Table    | Enter basic plan data and define contributory rates for your organization’s pension plans.                                                                              |
| Establishing Age-Graded Rates | AGE_RATE_TABLE     | Define Business Rules, Define General Data (NLD), Setup, Age-Graded Rate Table | Define rates for insurance benefit plans for employees and their dependents                                                                                             |
| Coverage Group Table          | COVERAGE_GROUP_TBL | Define Business Rules, Define General Data (NLD), Setup, Coverage Group Table  | Define coverage group codes that set the maximum total life and accidental death and dismemberment (AD/D) coverage for life insurance and AD/D insurance benefit plans. |

## Setting Up Leave Plans

Access the Leave Plan Table page.

Leave Plan Table

**Plan Type:** 50 Sick  
**Benefit Plan:** KCSICK GBI Sick Leave Plan

**Leave Plans** Find | View All First 1 of 1 Last

**\*Effective Date:** 01/01/1980

**Accrual Process Date:** 01/31/2000

**Accrual Calculation**

**\*Service Units:** Months

**\*Accrual Rate Units:** Hours per Month

**Award Frequency:** First Run of Month

**Automatic Accrual Processing**

☐ **Special Calculation Routine** **\*Max Leave Balance:** 80.000

☐ **Service Calc at Year Begin** **Max Leave Carryover:** 40.000

☒ **Manual Accrual Processing**

☐ **Pay in Lieu of Time Off**

☒ **Pay at Termination** **Percent to Pay at Termination:** 100.00

☒ **Allow Negative Balance** **Max Negative Hours Allowed:**

Leave Plan Table page (1 of 2)

| First Year Award Values |               |                 | Find   View All | First | 1 of 1 | Last |
|-------------------------|---------------|-----------------|-----------------|-------|--------|------|
| *Employment Month       | *Hours Earned | *Month Eligible |                 |       |        |      |
| 0                       |               |                 |                 |       |        |      |

  

| Accrual Rate Values    |                  |          | Find   View All | First | 1-3 of 3 | Last |
|------------------------|------------------|----------|-----------------|-------|----------|------|
| After Service Interval | *Accrue Hours At |          |                 |       |          |      |
| 0                      | Service Months   | 4.000000 | Hours per Month | +     | -        |      |
| 12                     | Service Months   | 6.000000 | Hours per Month | +     | -        |      |
| 60                     | Service Months   | 8.000000 | Hours per Month | +     | -        |      |

  

| Service Bonus Values   |                    |           | Find   View All | First | 1-2 of 2 | Last |
|------------------------|--------------------|-----------|-----------------|-------|----------|------|
| After Service Interval | *Award Bonus Hours |           |                 |       |          |      |
| 0                      | Service Months     | 16.000000 |                 | +     | -        |      |
| 60                     | Service Months     | 24.000000 |                 | +     | -        |      |

  

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

Leave Plan Table page (2 of 2)

|                             |                                                                                                                                                                                                  |
|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Plan Type</b>            | The plan type that you entered to access this page.                                                                                                                                              |
| <b>Benefit Plan</b>         | The benefits plan that you entered to access this page.                                                                                                                                          |
| <b>Accrual Process Date</b> | The date you last ran a leave accrual calculation process, for the displayed leave <b>Plan Type</b> and <b>Benefit Plan</b> .                                                                    |
| <b>Accrual Calculation</b>  |                                                                                                                                                                                                  |
| <b>Service Units</b>        | The units by which you measure your employee's length of service: <i>Hours</i> or <i>Months</i> .                                                                                                |
| <b>Accrual Rate Unit</b>    | The unit by which the accrual rate is quoted. Accrual awards are always measured in hours, so valid values are <i>Hours per Hour</i> , <i>Hours per Month</i> , and <i>Hours per Year</i> .      |
| <b>Award Frequency</b>      | A display-only field that tells you how often your employees receive the leave accrual award. The valid values are <i>Every Run</i> , <i>First Run of Month</i> , and <i>First Run of Year</i> . |

**Award Frequency** is determined by the **Accrual Rate Unit** as follows:

| <b>Accrual Rate Unit</b> | <b>Award Frequency</b> |
|--------------------------|------------------------|
| Hours per hour           | Every run              |
| Hours per month          | First run of month     |
| Hours per year           | First run of year      |

**Automatic Accrual Processing**

Define the parameters for the system to automatically process and accrue employee leave time.

|                                                                          |                                                                                                                                                                                                                                                                                                                                                              |
|--------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Special Calculation Routine</b>                                       | Select if your company has programmed a special calculation method.                                                                                                                                                                                                                                                                                          |
| <b>Max Leave Balance</b><br>(maximum leave balance)                      | Enter the maximum leave hours that an employee can accrue for the leave plan. If there is no maximum, enter <b>99999</b> .                                                                                                                                                                                                                                   |
| <b>Service Calc at Year Begin</b><br>(service calculation at year begin) | Select to calculate leave hours according to length of service as of January 1 of the current year.<br><br>Don't select this check box if you want to calculate leave hours according to the length of service as of the Leave Accrual Process Date. When performing this calculation, the system uses the service date in the employee's employment record. |
| <b>Max Leave Carryover</b><br>(maximum leave carryover)                  | Enter the maximum number of hours that an employee can carry from one calendar year to the next. The system accepts a zero to indicate that there is no carryover allowed. If there is no maximum, enter <b>99999</b> .                                                                                                                                      |

**Manual Accrual Processing**

The values you enter in this group box are for reference only; they don't affect leave accrual plan processing in any way.

|                                                                    |                                                                                                                |
|--------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|
| <b>Pay in Lieu of Time Off</b>                                     | Select if you pay employees for accrued leave time that they don't use.                                        |
| <b>Pay at Termination</b>                                          | Select if employees can be paid at termination for a portion or for all time accrued.                          |
| <b>Percent to Pay at Termination</b>                               | If you selected <b>Pay at Termination</b> , enter the percentage of pay that employees receive at termination. |
| <b>Allow Negative Balance</b>                                      | Select if you allow employees to take more hours than they have accrued.                                       |
| <b>Max Negative Hours Allowed</b> (maximum negative hours allowed) | Enter the maximum number of negative hours the employee is allowed.                                            |

**First Year Award Values**

For leave plans that use annual accruals, you can use **First Year Award Values** to define a leave plan in which, during the first year of service, leave hours are prorated based on the month employment begins. **First Year Award Values** are available only when the leave plan's **Accrual Rate Unit** value is **Hours Per Year**.

In the following year, these new hires are no longer considered first-year employees and don't receive leave accrual awards based on their first year award values. Instead, they receive leave accrual awards based on the accrual rate units defined on the prior page.

|                         |                                                                     |
|-------------------------|---------------------------------------------------------------------|
| <b>Employment Month</b> | Enter the month that the employee began service with your company.  |
| <b>Hours Earned</b>     | Enter the amount of hours earned.                                   |
| <b>Month Eligible</b>   | Enter the month the employee became eligible for the leave benefit. |

### ***Accrual Rate Values***

The **Accrual Rate Values** are defined in terms of the **Service Unit** and **Accrual Rate Unit**. Enter the values that define how your employees accrue time for this leave plan.

|                               |                                                                                                                                                       |
|-------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>After Service Interval</b> | Using the <b>Accrual Rate Values</b> that you defined, enter the interval of service after which an employee accrues leave time.                      |
| <b>Accrue Hours At</b>        | Using the <b>Accrual Rate Values</b> that you defined, enter the interval of service that an employee accrues for the <b>After Service Interval</b> . |

In this example, **Service Unit** values are defined in hours per month. For the first 12 months of service, employees that you enroll in this sick leave plan accrue four hours per month; for months 13 through 60, employees accrue six hours per month and eight hours of sick leave per month thereafter.

If you choose a **Service Unit** value of *Hours Per Hour*, the accrual rate values display the amount of hours that an employee would receive after a certain number of hours of service. If you choose an **Accrual Rate Unit** value of *Hours per Year*, the accrual rate values display the **Hours Per Year** that an employee is awarded after a certain number of months of service.

### ***Service Bonus Values***

Using this group box, define how an employee in the plan accrues bonus hours. These hours are in addition to regular leave hour accruals. For example, you can structure a vacation leave plan so that an employee receives a one-time special bonus of 20 hours upon enrolling in the plan; after five years, a one-time special bonus of 40 hours; and after ten years, another one-time special bonus of 40 hours.

|                               |                                                                                                                                              |
|-------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| <b>After Service Interval</b> | Using the <b>Accrual Rate Values</b> that you define, enter the interval of service after which an employee accrues bonus hours.             |
| <b>Award Bonus Hours</b>      | Using the <b>Accrual Rate Values</b> that you define, enter the bonus hours the employee receives for the service interval that you specify. |

## Defining Pension Plan Details

Access the Pension Plan Table page.

Pension Plan Table

**Benefit Plan:** KUHP GBI Hourly Plan **Effective Date:** 01/01/1960

**Plan Type:** 82 Pension Plan 1 - U.S.

**US Pension Plans** Find | View All First 1 of 1 Last

\*Effective Date: 01/01/1960

\*Pension Type: Qualified ☐ Allow Contingent Beneficiaries

Plan Yr Begins (Month/Day): 1 1

Plan Yr Ends (Month/Day): 12 31

**Contributory Plans**

☐ Voluntary Contributions Allowed Special Accumulator Code:

Rates of Deduction:

% up to and % over:

Pension Plan Table page

**Important!** The beneficiaries and **Pension Type** fields are for United States and Canadian functionality and are not for operations in The Netherlands.

|                                          |                                                                                       |
|------------------------------------------|---------------------------------------------------------------------------------------|
| <b>Benefit Plan</b>                      | The benefit plan that you entered to access this page, along with its description.    |
| <b>Plan Type</b>                         | The plan type that you entered to access this page, along with its description.       |
| <b>Plan Yr Begins</b> (plan year begins) | The year in which the pension plan begins. Enter the information in month/day format. |
| <b>Plan Yr Ends</b> (plan year ends)     | The year in which the pension plan ends. Enter the information in month/day format.   |

A plan year normally ends the day before the next one begins. However, if you change your plan year, the row for the resulting short plan year has nonconsecutive beginning and end dates. For example, if the plan year changes from a July-June year to a calendar year resulting in a short plan year in 1980, the Pension Plan table includes the following data:

| <i>Effective Date</i> | <i>Plan Year Begin Date</i> | <i>Plan Year End Date</i> |
|-----------------------|-----------------------------|---------------------------|
| 1/1/1900              | 7/1                         | 6/30                      |
| 1/1/1980              | 7/1                         | 12/31                     |
| 1/1/1981              | 1/1                         | 12/31                     |

**Warning!** Be sure to include a row for the short plan year. Failure to do this can cause calculation errors.

### Contributory Plans

**Voluntary Contributions Allowed** (voluntary contributions allowed)

Select if the pension plan allows voluntary contributions. There are no parameters for defining voluntary contribution rates; these are established on an employee-by-employee basis when you enroll employees in the plan.

**Special Accumulator Code**

Enter the **Special Accumulator Code**, if applicable, to track earnings for mandatory contributions that can be structured as a percent of earnings subject to pension withholding.

**Rates of Deduction**

Enter the contribution rates. You can have different rates above and below a threshold. For example, employees can contribute 2 percent of earnings up to ANG 50,000 and 3 percent of earnings above that.

Enter the rate up to the threshold in the first **Rates of Deduction** field, the threshold in the next field, and the rate beyond the threshold in the final field.

## Establishing Age-Graded Rates

Access the Age-Graded Rate Table Page

Age-Graded Rate

Age-Graded Rate Table ID: IRS

**Age Graded Rate Table** Find | View All First 1 of 1 Last

\*Effective Date: 07/01/1999

\*Premium Pay Frequency: M Monthly

\*Rate per Unit: Per Thousd [Specify Limit](#)

**Coverage/Price** Find | View All First 1-5 of 22 Last

General Employer Portion Employee Portion

| *Gender | Age Range Low | Age Range High | Total Rate - Smoker | Total Rate - Nonsmoker |   |   |
|---------|---------------|----------------|---------------------|------------------------|---|---|
| Female  | 1             | 24             | 0.050               | 0.050                  | + | - |
| Female  | 25            | 29             | 0.060               | 0.060                  | + | - |
| Female  | 30            | 34             | 0.080               | 0.080                  | + | - |
| Female  | 35            | 39             | 0.090               | 0.090                  | + | - |
| Female  | 40            | 44             | 0.100               | 0.100                  | + | - |

Age-Graded Rate Table: General page

**Common Page Information**

|                                 |                                                                                                                                                                                                                                                                                                      |
|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Age-Graded Rate Table ID</b> | The ID that you entered to access this page.                                                                                                                                                                                                                                                         |
| <b>Effective Date</b>           | The <b>Effective Date</b> must be the same as, or prior to, the effective dates of the benefit program and benefit plan combinations with which you associate the rates.                                                                                                                             |
| <b>Premium Pay Frequency</b>    | Select <i>Weekly</i> , <i>Biweekly</i> , <i>Semimonthly</i> , <i>Monthly</i> , or <i>Annual</i> .                                                                                                                                                                                                    |
| <b>Rate per Unit</b>            | Select from the following values:<br><br><i>None:</i> For a flat rate.<br><br><i>Per Hundred:</i> For a rate that applies to each ANG 100.00 of coverage.<br><br><i>Per Thousand:</i> For a rate that applies to each ANG 1000.00 of coverage.                                                       |
| <b>Specify Limit</b>            | Click this link to display the Amount to Limit page. The Amount to Limit page defines the portion of the employee rate that is subject to the percent of gross pay limit defined on the Calculation Rule page: <i>All</i> , <i>Flat Amount</i> , <i>Not Applicable</i> , or <i>Percent of Rate</i> . |

**General Tab**

|                               |                                                                                                                                                                   |
|-------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Gender</b>                 | Define rates for males and females separately. For each rate, define the <b>Gender</b> . Once you select a gender, the rates apply only to the gender you select. |
| <b>Age Range Low</b>          | Select a low age to define this age range. The system won't accept a low age range that exceeds the high age range.                                               |
| <b>Age Range High</b>         | Select a high age to define this age range. The system won't accept a low age range that exceeds the high age range.                                              |
| <b>Total Rate - Smoker</b>    | Enter the total rate for smoker, according to the rates per unit.                                                                                                 |
| <b>Total Rate - Nonsmoker</b> | Enter the total rate for a nonsmoker, according to the rates per unit.                                                                                            |

**Employer Portion Tab**

|                       |                                                                                                                      |
|-----------------------|----------------------------------------------------------------------------------------------------------------------|
| <b>Age Range Low</b>  | Select a low age to define this age range. The system won't accept a low age range that exceeds the high age range.  |
| <b>Age Range High</b> | Select a high age to define this age range. The system won't accept a low age range that exceeds the high age range. |

**Smoker** Enter the employer portion rates for **Smoker** according to the rates per unit that you selected. The employer portion rates can't exceed the values in the Total Rate - Smoker column.

**Nonsmoker** Enter the employer portion rates for **Nonsmoker** according to the rates per unit that you selected. The employer portion rates can't exceed the values in the Total Rate - Nonsmoker column.

### ***Employee Portion***

**Smoker** The system calculates these rates based on the **Total Rate - Smoker** rates on the Age-Graded Rate Table: General tab and the **Smoker** rates on the Age-Graded Rate Table: Employer Portion tab.

**Nonsmoker** The system calculates these rates based on the **Total Rate - Nonsmoker** rates on the General tab and the **Nonsmoker** rates on the Employer Portion tab.

---

## **Creating Life and Accidental Death and Dismemberment Insurance Coverage Groups**

Access the Coverage Group Tbl page.

Coverage Group Tbl

Coverage Group Code: KCE1

**Coverage Groups** Find | View All First 1 of 1 Last

\*Effective Date: 01/01/1980

\*Status: Active

Coverage Maximum: 1,000,000

Coverage Group Tbl page

### ***Coverage Groups***

The fields in this group box define coverage group codes that set the maximum total life and accidental death and dismemberment (AD/D) coverage for life insurance and AD/D insurance benefit plans.

**Coverage Group Code** The code used to access the page.

**Coverage Maximum** Enter a maximum coverage amount for the coverage group. The **Coverage Maximum** applies to all the life and AD/D insurance benefit plans associated with the **Coverage Group Code** and associated with one benefit program.

---

## Entering Dependents and Beneficiaries

Use the Dependent/Beneficiary component to set up data for dependents and beneficiaries before enrolling employees in specific benefit programs. The advantage of setting up data for dependents and beneficiaries before enrolling the dependents or assigning the beneficiaries to employees is that, regardless of how many times you go through the latter processes, you enter personal data once. This data includes name, address, and the relationship to employee. Enter a dependent's data using the Dependent/Beneficiary pages and then enroll the dependent in multiple benefits.

For example, you can enroll a person as a dependent in a medical plan and a dental plan and assign the person as the beneficiary of a savings plan, for a total of three entries, but you set up data for the person once. That way, as part of enrollments, you can prompt the system for the data and won't have to reenter it each time that you enroll a dependent or assign a beneficiary.

### See also

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

## Specifying Employee Bank Information

Specify the methods for paying employee net income on the Bank/Giro page.

---

### Page Used to Specify Employee Bank Information

| <i>Page Name</i> | <i>Object Name</i> | <i>Navigation</i>                                                           | <i>Usage</i>                                            |
|------------------|--------------------|-----------------------------------------------------------------------------|---------------------------------------------------------|
| Bank/Giro        | DIRECT_DEPOSIT_NLD | Define Business Rules, Define General Data (NLD), Use, Bank/Giro, Bank/Giro | Specify the bank account information for each employee. |

---

## Entering Payment Method Data

Access the Bank/Giro page.

Bank/Giro

Bakker, Kees den ID: KN0003

**Direct Deposit Details** View All First 1 of 1 Last

\*Effective Date: 01/01/1999 \*Status: Active

**Bank Details** View All First 1 of 1 Last

Priority: 1

Bank ID: 01506801

Branch ID:

Account #: 161513565

Ledger Account#:

%Net Pay / Amount: 100.00

Payment Description: Base Salary

**Payment Type**

☐ Cash

☒ Bank

☐ Giro

**Ascription**

Salary

Bank/Giro page

**Priority**

Enter a priority to indicate in which order to make payments or distributions to multiple accounts. The lower the priority number, the higher the priority. This is important when an employee's net pay doesn't cover all payments and account deposits.

**Payment Type**

Options include the following:

**Cash:** a payment in cash.

**Bank:** a payment to a bank.

**Giro:** a payment to a Giro account.

**Bank ID**

Select a bank ID from the list of options.

**Branch ID**

Enter a branch ID for your bank (optional).

**Account #** (account number)

Enter an account number for your bank (required). It must comply with the 11-Check account validation method.

**Ledger Account#** (ledger account number)

If the payment is cash for the deposit of any uncollected funds, enter a ledger account number.

**% of Net Pay / Amount** (percentage of net pay amount)

Enter a percentage of net pay or an exact amount to be paid. If there are multiple payments or distributions, then state each as either a percentage of net pay or an amount. For example, an employee might want to have EUR 50.00 deposited to a savings account, receive a check for EUR 100, and have 100 percent of the remaining net pay deposited to a checking account.

**Ascription**

Enter information regarding the name or identity of the account owner (optional).



## CHAPTER 3

# Entering Earnings, Payments, and Other Payroll Information

After you have entered standardized information about your salary administration system into the setup tables, you can collect information about payments to employees (such as regular salary and related additional earnings) that is needed to process payroll. It's also time to enter payroll-related information about employee bank and account information.

This chapter explains how to enter employee earnings.

## Understanding Earnings and Payments

Earnings are payments made to employees, and total earnings comprise regular salary and additional earnings. Earnings or payments are permanent or incidental. For example, regular salary is a permanent payment, traveling allowance for commuting is a permanent additional payment, and a one-time performance bonus is an incidental additional payment.

## Entering Employee Earnings

In addition to regular salary, you might need to enter additional earnings information for employees or employee groups. The page you use to enter earnings depends upon the nature of the earning. Here are some important terms to understand:

|                            |                                                                                                                                                                                                                                                                                                 |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Permanent earnings</b>  | Earnings that cover a time period with an initial and final date, but the final date is open, and the payment continues indefinitely until the final date is closed. Examples of such earnings include a fixed commuting allowance, a telephone allowance, or a labor market salary adjustment. |
| <b>Incidental payments</b> | Cover a one-time payment inside a closed time period. An example of an incidental earning is a performance bonus.                                                                                                                                                                               |
| <b>Incidental hours</b>    | Pay for hours other than regular, straight time. Examples of incidental hours are holiday, vacation, overtime, and double overtime.                                                                                                                                                             |

---

## Common Elements Used in This Chapter

The following fields and definitions are common to the Earnings, Incidental Earnings, Incidental Hours, and Hours Changed pages.

|                                    |                                                                                                                                                                                                                                                                                  |
|------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Earnings Code</b>               | Enter the earnings code for the employee. If there is more than one earnings code, add additional rows. Although you can enter an unlimited number of earnings for an employee, the types of possible earnings for an employee depend upon the employee's company and pay group. |
| <b>Currency Code</b>               | The currency code is set by default from the job currency code, but can be overridden.                                                                                                                                                                                           |
| <b>Hours</b>                       | If earnings are based upon hours worked, enter the hours.                                                                                                                                                                                                                        |
| <b>Hourly Rate</b>                 | If earnings are based upon hours worked, enter the hourly rate.                                                                                                                                                                                                                  |
| <b>Earnings</b>                    | If earnings are based upon a specific amount or fixed allowance, enter the amount here.                                                                                                                                                                                          |
| <b>Sequence</b>                    | Numeric sequencing is required if entering multiple earnings information using the same effective date.                                                                                                                                                                          |
| <b>Pay Group</b>                   | The pay group you are working with.                                                                                                                                                                                                                                              |
| <b>Begin Period and End Period</b> | Indicate the period of time to which the incidental earnings apply.                                                                                                                                                                                                              |
| <b>OK to Pay</b>                   | If your organization has a procedure in place to first enter the earnings and then to obtain an approval for the payment of the earnings, select this check box to indicate payment approval.                                                                                    |

---

## Pages Used to Enter Employee Earnings

| <b>Page Name</b> | <b>Object Name</b> | <b>Navigation</b>                                                         | <b>Usage</b>                                                                                                                                |
|------------------|--------------------|---------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| Earnings         | ADDITIONAL_PAY1_NL | Define Business Rules, Define General Data (NLD), Use, Earnings, Earnings | Enter all types of permanent extra payments made to employees in addition to regular salary. Do not enter Incidental earnings on this page. |

| <b>Page Name</b>    | <b>Object Name</b> | <b>Navigation</b>                                                                               | <b>Usage</b>                                                                                                                                                                                                                                                                                                                                         |
|---------------------|--------------------|-------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Incidental Earnings | EARNINGS_INC_NL    | Define Business Rules, Define General Data (NLD), Use, Incidental Earnings, Incidental Earnings | Enter incidental payments made to employees. (You must have first set up valid earnings codes in the Earnings table and completed the Earnings page.)                                                                                                                                                                                                |
| Incidental Hours    | ADDL_HRS_INC_NL    | Define Business Rules, Define General Data (NLD), Use, Incidental Hours, Incidental Hours       | Enter incidental payments made to individual employees on an hourly basis. (You must have first defined the earnings codes in the Earnings table.)                                                                                                                                                                                                   |
| Hours Changed       | ADDL_HRS_DE_INC_NL | Define Business Rules, Define General Data (NLD), Use, Hours Changed, Hours Changed             | Enter payments made to an employee group on an hourly basis. Do not use this page to enter information about incidental earnings; enter incidental earnings on the Incidental Earnings page. (You must have first set up valid earnings codes in the Earnings table and one or more pay calendars for the pay groups to which the employees belong.) |

---

## Entering Permanent Earnings Data

Access the Earnings page.

Earnings

Bakker,Kees den Employee EmplID: KN0003 Empl Rcd#: 0

**Additional Pay Details** View All First 1 of 1 Last

\*Earnings Code: MIL Mileage Reimbursement + -

**Pay Details** View All First 1 of 1 Last

\*Effective Date: 01/01/1999 Earnings End Date: + -

Compensation Rate/Frequency: 9,125.00 NLG / Monthly

Standard Hours: 40.00 Work Period: Weekly

Currency Code: Employee Type: Salaried

Hours: Hourly Rate:

Earnings: \$525.00 Reason: Not Specif

Goal Amount: ☒ OK to Pay

### Earnings page

#### Earnings End Date

Enter the date that the earnings end. To enter repeated earnings end dates, add data rows.

#### Compensation Rate/Frequency

The rate of compensation and frequency of that compensation per employee.

#### Standard Hours

The standard hours that the employee works per work week.

#### Work Period

Select a standard work period. The standard work period is 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 full-time equivalency (FTE).

#### Employee Type

The employee type according to predetermined variables.

#### Reason

Select a reason for the payment.

#### Goal Amount

If there is a limit to the total amount that you want to pay the employee, such as when the payment is made in a series of smaller payments over several pay periods, then enter the limit here.

---

## Entering Incidental Earnings Data

Access the Incidental Earnings page.

| Incidental Earnings                           |                                    |
|-----------------------------------------------|------------------------------------|
| Bakker,Kees den                               | Employee                           |
| EmplID: KN0003                                | Empl Rcd#: 0                       |
| Earnings Details                              |                                    |
| View All First 1 of 1 Last                    |                                    |
| *Effective Date: 01/31/2000                   | Company: Global Business Institute |
| Sequence: 0                                   | Pay Group: Monthly - Netherlands   |
| *Earnings Code: BNS Bonus                     | Currency Code:                     |
| Earnings: 17000.00                            |                                    |
| Unit/Hours:                                   | Rate/Perc:                         |
| Begin Period: 01/01/1999                      | End Period: 12/31/1999             |
| Comments: Yearly share of profits             |                                    |
| <input checked="" type="checkbox"/> OK to Pay |                                    |

Incidental Earnings page

**Unit/Hours** Enter the applicable units or hours for which the employee should be compensated.

**Rate/Perc** (rate percentage) Enter the applicable rate or percentage of compensation.

## Entering Incidental Hours Data

Access the Incidental Hours page.

| Incidental Hours             |                                               |
|------------------------------|-----------------------------------------------|
| Bakker,Kees den              | Employee                                      |
| EmplID: KN0003               | Empl Rcd#: 0                                  |
| Incidental Hours Details     |                                               |
| View All First 1 of 1 Last   |                                               |
| *Effective Date: 03/31/2000  | Company: Global Business Institute            |
| Sequence: 0                  | Pay Group: Monthly - Netherlands              |
| *Earnings Code: OTP Overtime | Currency Code:                                |
| Other Hours: 2.00            | Hourly Rate: 75.000000                        |
| Regular Shift:               | <input checked="" type="checkbox"/> OK to Pay |
| Begin Period:                | End Period:                                   |
| Comments:                    |                                               |

Incidental Hours page

**Other Hours** Enter the amount of other hours worked.

**Hourly Rate** Enter the hourly rate for the other hours worked.

**Regular Shift** Indicate the employee's regular shift.

## Entering Incidental Hourly Earnings Data

Access the Hours Changed page.

Hours Changed

Effective Date: 01/02/1998

Hours Changed Details View All First 1 of 1 Last

|               |            |                                               |                                                                                                                                                                         |
|---------------|------------|-----------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| *EmpID:       | B-BARET195 | O'Leary, Kevin                                |   |
| Empl Rcd#:    | 0          | Company:                                      | Company BN1                                                                                                                                                             |
| Sequence:     | 0          | Pay Group:                                    | RCB Test Semi-monthly PayGroup                                                                                                                                          |
| *Hours Type:  |            | Currency Code:                                | USD                                                                                                                                                                     |
| Hours:        |            | Hourly Rate:                                  |                                                                                                                                                                         |
| Shift:        |            | <input checked="" type="checkbox"/> OK to Pay |                                                                                                                                                                         |
| Begin Period: |            | End Period:                                   |                                                                                                                                                                         |
| Comments:     |            |                                               |                                                                                                                                                                         |

Hours Changed page

### Hours Type

Select the hours type. The hours type is a list of earnings codes.

Available codes include only those earnings codes that are defined as incidental *and* that are based upon hours in the Earnings table. If there is more than one type of incidental hours for this employee, add additional data rows.

Although you can enter an unlimited number of incidental earnings for an employee, the possible types of incidental earnings for an employee depend upon the employee's company and pay group.

### Shift

Select the employee's regular shift.

## CHAPTER 4

# Entering Benefits and Deductions

In this chapter, we discuss how to:

- Use the standardized information that you set up in your salary administration system to enter payroll-related data about employee benefits and deductions into PeopleSoft Human Resources.
- Process all types of deductions from employees' pay, including permanent benefits deductions (such as contributions to a health insurance or pension program) and related general deductions (such as the settlement of a cash advance).

---

**Note.** Before you can record deductions and participation in benefit plans for your employees, ensure that they are assigned to a benefits program using the Verifying Enrollment.

---

### See Also

*PeopleSoft Human Resources PeopleBook: Administer Workforce*, “Hiring Your Workforce”

## Reviewing Employee Eligibility for Benefits

You can review employee benefits eligibility on the Employee Data Summ page.

---

### Page Used to View Personnel Data

| <i>Page Name</i>                                 | <i>Object Name</i>    | <i>Navigation</i>                                                                            | <i>Usage</i>                                                                                                          |
|--------------------------------------------------|-----------------------|----------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|
| Employee Data Summ<br>(employee data<br>summary) | EMPLOYEE_SUMM<br>ARY1 | Define Business Rules,<br>Define General Data<br>(NLD), Inquire,<br>Employee Data<br>Summary | View the personnel<br>administration data that<br>you need to determine<br>an employee's<br>eligibility for benefits. |

---

### Viewing Personal Information for Benefits Eligibility

Access the Employee Data Summ (employee data summary) page.

| Employee Data Summ                |                           |                              |
|-----------------------------------|---------------------------|------------------------------|
| Jones, Susan                      |                           | ID: K0G001      Empl Rcd#: 0 |
| Employee Summary Data             |                           |                              |
| <b>Employee Status:</b>           | Active                    |                              |
| <b>Benefits Employee Status:</b>  | Active                    |                              |
| <b>Full/Part Time:</b>            | Full-Time                 |                              |
| <b>Regular/Temporary:</b>         | Regular                   |                              |
| <b>Standard Hours:</b>            | 40.00                     |                              |
| <b>Work Period:</b>               | Weekly                    |                              |
| <b>Pay Group:</b>                 | Pay Group 1               | K0PGA                        |
| <b>Company:</b>                   | Global Business Institute |                              |
| <b>Employee Type:</b>             | Not Applicable            |                              |
| <b>Business Unit:</b>             | GBIBU                     | Global Business Institute BU |
| <b>Job Code:</b>                  | KU013                     | Financial Analyst            |
| <b>Department:</b>                | KU001                     | Human Resources              |
| <b>Location Code:</b>             | KUCA00                    | California Location          |
| <b>Annual Benefits Base Rate:</b> |                           |                              |

Employee Data Summ page (1 of 2)

| National ID                    |            |                       |                                            |
|--------------------------------|------------|-----------------------|--------------------------------------------|
| <b>Country:</b>                | USA        | <b>NID Type:</b>      | PR      SSN <b>National ID</b> 299-00-1061 |
| <b>Gender:</b>                 | Female     |                       |                                            |
| <b>Marital Status:</b>         | Single     |                       |                                            |
| Significant Dates              |            |                       |                                            |
| <b>Hire Date:</b>              | 06/15/1996 | <b>Service Date:</b>  | 06/15/1996                                 |
| <b>Company Seniority Date:</b> | 06/15/1996 | <b>Rehire Date:</b>   |                                            |
| <b>Termination Date:</b>       |            | <b>Date of Birth:</b> | 03/20/1954                                 |
| <b>Effective Date:</b>         | 06/15/1996 | <b>Date of Death:</b> |                                            |

Employee Data Summ page (2 of 2)

**Employee Status, Full/Part Time, Regular/Temporary, Pay Group, and Annual Benefits Base Rate** each directly affect either benefit eligibility or benefit processing. The date information that appears in the **Significant Dates** group box, such as **Hire Date** or **Seniority Date**, can directly affect benefit eligibility. The following fields are defined for the employee on the Job record:

**Employee Status**

The employee's status, which is based on the last personnel action for the employee or the reason for the action, such as death.

**Full/Part Time**

Whether the employee works a full-time or part-time schedule as defined on the Job Data - Job Information page.

**Full-Time:** Defined by the standard hours specified in the Salary Plan table or by the default standard hours specified in the Installation table.

However, if you've specified default Standard Hours for your user ID on the Primary Permission List table, the default standard hours come from the Primary Permission List table for your user ID. If an employee is hired into a location that has been assigned a salary administration plan on the Location table, the salary administration plan defines what constitutes full time.

**Part-Time:** Defined by your organization.

|                                                |                                                                                                                                                                                                                                                                     |
|------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Regular/Temporary</b>                       | Whether the employee is a regular or temporary employee as defined on the Job Data - Job Information Page.                                                                                                                                                          |
| <b>Standard Hours</b>                          | The standard hours for the employee as defined on the Job Information page. Standard hours define how many hours the employee should work in the job.                                                                                                               |
| <b>Work Period</b>                             | Select a standard work period, or rather the time period in which employees must complete the standard hours.<br><br>The system uses the annualization factor of the standard work period in combination with the standard hours to calculate full time equivalent. |
| <b>Pay Group</b>                               | The employee's pay group as defined on the Pay Group table.                                                                                                                                                                                                         |
| <b>Employee Type</b>                           | The employee type as defined on the Pay Group table.                                                                                                                                                                                                                |
| <b>Business Unit</b>                           | An organizational level for tracking specific business information for reporting and other roll-up data collection.                                                                                                                                                 |
| <b>Job Code</b>                                | The job code for this employee as defined in the Job Code table.                                                                                                                                                                                                    |
| <b>Department</b>                              | The employee's department as defined on the Department table.                                                                                                                                                                                                       |
| <b>Location Code</b>                           | The employee's location code as defined on the Location table.                                                                                                                                                                                                      |
| <b>Annual Benefits Base Rate</b>               | The employee's annual benefits base rate. This field is blank if your organization uses a benefits base that is different from regular pay. (Set up the benefits base rate on the Compensation page of the Job Data component.)                                     |
| <b>NID Type</b> (national identification type) | The employee's national identification type.                                                                                                                                                                                                                        |
| <b>National ID</b>                             | The employee's identification number.                                                                                                                                                                                                                               |
| <b>Service Date</b>                            | The employee's service date.                                                                                                                                                                                                                                        |

|                               |                                                                                                                                 |
|-------------------------------|---------------------------------------------------------------------------------------------------------------------------------|
| <b>Company Seniority Date</b> | The employee's company seniority date, or rather the date that the employee started service with a company in the organization. |
| <b>Rehire Date</b>            | The employee's rehire date, if applicable.                                                                                      |
| <b>Termination Date</b>       | The employee's termination date, if applicable.                                                                                 |
| <b>Date of Birth</b>          | The employee's date of birth.                                                                                                   |
| <b>Date of Death</b>          | The employee's date of death, if applicable.                                                                                    |

**See Also**

*PeopleSoft Application Fundamentals for HRMS PeopleBook*, "Setting Up and Using Frequencies," Defaulting of Standard Hours and Standard Work Period

## Identifying Employee Social Insurance Providers

Use the Social Insurance page to identify social insurance providers.

---

### Page Used in Identifying Employee Social Insurance Providers

| <b>Page Name</b> | <b>Object Name</b> | <b>Navigation</b>                                                                         | <b>Usage</b>                                                                                                                              |
|------------------|--------------------|-------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| Social Insurance | SOCIAL_ASSUR_NL    | Define Business Rules, Define General Data (NLD), Use, Social Insurance, Social Insurance | Identify an employee's participation in coverage under one of the national social insurance programs and identify the insurance provider. |

---

### Identifying Employee Participation in National Social Insurance Program

Access the Social Insurance page.

Social Insurance

Jones, Susan Employee ID: K0G001 Empl Rcd#:

**Social Insurance Details** View All First 1 of 1 Last

\*Effective Date: 06/15/1996 [calendar icon] \*Status: Active [dropdown] [+ -]

**National Health Service**

\*Premium Health Insurance: No ded [dropdown]

SetID: [text] [magnifying glass icon]

Vendor: [text] [magnifying glass icon]

Registration No.: [text]

☐ Reducement Unemployment

\*Disability Insurance: Deduction [dropdown]

\*Premium Health Law: No Ded [dropdown]

\*Unemployment Tax: No Ded [dropdown]

Social Insurance page

- ID** The employee's ID appears to the right of the employee's name and status.
- National Health Service** If the employee's income is below the national health care limit, then that employee is required by law to participate in a national health service scheme.
- Premium Health Insurance** Select one of the following:
- Deduction:*** Select if the law requires the employee's participation in a national health service scheme.
- No Ded*** (no deduction): Select if the law doesn't require the employee's participation in a national health service scheme.
- Vendor** If the employee is required to participate in a national health service scheme, select the vendor from the list. Leave this field blank if the law doesn't require the employee to participate in a national health service scheme.
- Registration No.**  
(registration number) If the employee is required to participate in a national health service scheme, enter the employee's association member registration number. Leave this field blank if the law doesn't require the employee to participate in a national health service scheme.
- Reducement Unemployment** Select this check box if, at the time of hire, the employee was classified as "long-term unemployed."

**Disability Insurance**

If you selected **Reducement Unemployment**, select **Deduction** or **No Ded** from the **Disability Insurance** options.

**Premium Health Law**

If you didn't select **Reducement Unemployment**, select **Deduction** or **No Ded** from the **Premium Health Law** options. Use the values to indicate whether the employee should have deductions for premium health care.

**Unemployment Tax**

If you didn't select **Reducement Unemployment**, select **Deduction** or **No Ded** from the **Unemployment Tax** options. Use the values to indicate whether the employee should have deductions for premium health care.

## Providing Social Insurance Notification

Dutch employers must report personal data to the insurance board for every new employee. The purpose of the Insurance Board Notification (INT001NL) Structured Query Report (SQR) is to print the insurance board notification. Also, a Dutch employee must be insured in accordance with the Dutch National Health Service (DNHS), unless his or her income rises above a certain level. If this occurs, the Insurance Notification (INT002NL) SQR report can be used to inform the DNHS.

**See Also**

*PeopleSoft Application Fundamentals for HRMS PeopleBook*, “Appendix: PeopleSoft Application Fundamentals for HRMS Reports,” Generating Social Insurance Notification Reports

## Entering Employee Tax Withholdings

Enter employee tax withholdings on the Tax Data page.

### Page Used to Enter Employee Tax Withholdings

| <b>Page Name</b> | <b>Object Name</b> | <b>Navigation</b>                                                         | <b>Usage</b>                                                                                                                                 |
|------------------|--------------------|---------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| Tax Data         | EMPL_TAX_DATA_NL   | Define Business Rules, Define General Data (NLD), Use, Tax Data, Tax Data | Enter Dutch rules that determine an employee's wage tax. What you enter here affects the gross/net calculations made by your payroll system. |

## Entering Wage Tax Data

Access the Tax Data page.

The screenshot shows the 'Tax Data' page for employee Bentley, Angela (EmplID: B-BARET194). The page has a tabbed interface with 'Tax Data' selected. Below the employee name and ID, there's a 'Tax Data Details' section. This section contains several fields and checkboxes:
 

- \*Effective Date:** 08/24/2001 (with a calendar icon)
- \*Exception tax:** No Exception (dropdown menu)
- \*Tax Table Type:** White Tax Table (dropdown menu)
- \*Travel Data:** N/A (dropdown menu)
- Tax Credits:** Checked checkbox
- 30% Ruling:** Unchecked checkbox
- Anonymous Rate:** Unchecked checkbox
- Percentage Special Tax Rate:** Empty input field
- Taxable Income:** Empty input field

 At the top right of the details section, there are navigation buttons: 'View All', 'First', '1 of 1', and 'Last', along with '+' and '-' icons.

Tax Data page

### Tax Credit

Select this check box if the employee is claiming a tax credit, which reduces the amount of tax paid (heffingskorting).

In the new tax system, employers deal only with these tax credits: the general tax credit (algemene heffingskorting), the labor credit (arbeidskorting), and, if applicable, two old-age tax credits (ouderenkorting and aanvullende ouderenkorting).

### Exception tax

Select any exceptions to the wage tax.

### Tax Table Type

The Dutch tax tables used to determine the level of the employee's wage tax. Values are *No Tax*, *White Tax Table*, and *Green Tax Table*.

### Travel Data

Select any special fiscal rules that apply to employees working for the company abroad, or foreigners employed by the company in the Netherlands.

### 30% Ruling

Select if the 30 percent ruling applies to the employee, whereby 30 percent of their income is tax-free.

The 30 percent ruling applies to Dutch employees on international assignments and non-Dutch employees working in the Netherlands on an international assignment.

### Percentage Special Adjustment

Enter a deviating percentage special adjustment for special tax cases.

### Percentage Special Tax Rate

Enter the percentage special tax rate for special tax cases.

### Anonymous Rate

Select to indicate when an employee hasn't handed over the documentation regarded as official proof of identity.

When this occurs, to discourage illegal immigration, the highest tax rate (about 60 percent) is applied.

#### **Taxable Income**

Enter the employee's annual taxable income in guilders.  
Enter a gross amount before tax deductions.

## **Enrolling Employees in a Benefits Program**

### **To enroll employees in benefits programs and plans:**

1. Enroll participants in benefit programs during new hire processing.

Initially, an employee's benefit program is assigned automatically based on his or her employee pay group. That is, a benefits program is associated with a pay group and company on the Pay Group table, and then the pay group populates the employee Job Data record from the company level.

Change the employee's benefit program assignment using the Benefit Program Participation page. A modified version of this page is on the Define General Data (NLD) menu so that you can verify or override this assignment at the employee level without having to change menus in the system. It's important to verify that the employee is enrolled in the correct benefit program because you can enroll participants in only those benefit plans that are associated with their assigned benefit program.

2. After you are sure the employee is placed in the correct benefits program, use the individual benefit plan pages to enroll the participant in all appropriate benefit plans within the benefit program.

When you enroll employees in health insurance, life insurance, and pension benefit plans, also enroll their dependents and assign their beneficiaries.

### **Page Used to Enroll Employees in a Benefits Program**

| <b>Page Name</b>                                      | <b>Object Name</b> | <b>Navigation</b>                                                                                                   | <b>Usage</b>                                                                                                                                         |
|-------------------------------------------------------|--------------------|---------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|
| Ben. Prog. Partic.<br>(benefit program participation) | BEN_PROG_PARTICPTN | Define Business Rules, Define General Data (NLD), Use, Benefit Program Participation, Benefit Program Participation | Verify that an employee is enrolled in the correct benefit program; override the default setting to change the employee's benefit program if needed. |

### **Verifying Enrollment**

Access the Ben. Prog. Partic. (benefit program participation) page.

Ben. Prog. Partic.

Diepen, Maarten van ID: KN0010

**Benefit Program Participation** Find | View All First 1 of 1 Last

\*Effective Date: 11/11/1999

\*Benefit Program: KN1 Netherlands Base Benefits Currency Code: NLG

Ben. Prog. Partic. page

### Benefit Program

You can change the employee's benefit program enrollment by selecting from the list of values that appear when you click the magnifying glass button. When you press TAB to leave the **Benefit Program** field, the effective date changes to today's date and the currency code changes. Changes that you make here automatically affect the employee's job data record and appear on the Job Data - Benefits Program Participation page.

## Enrolling Employees in Benefit Plans

After you enroll a participant in a benefit program, the next part of the enrollment process is to enroll the participant in appropriate benefit plans. You can enroll the participant in only the benefit plans associated with the benefit program that you enrolled the participant in and according to the effective dates of both the program and the benefit plan. The system checks both dates against your enrollment effective date.

Most benefit plan enrollment components consist of an Elections page and a Dependents or Beneficiaries page. Use the Elections pages to enroll participants in multiple plan types and benefit plan options. For example, if you look at the Health Benefits - Elections page, notice two scroll bars. The outer scroll bar enables you to move from plan type to plan type, while the inner scroll bar enables you to move about within the historical benefit data for each individual benefit plan option.

Use the Dependents or Beneficiaries pages to enroll dependents and assign beneficiaries to benefit plans. These pages have three scroll bars: The outer scroll bar controls plan type data, the middle scroll bar controls plan option information for the selected plan type, and the inner scroll bar scrolls through a list of the dependents and beneficiaries associated with the benefit plan enrollment. Find an example of these three scroll bars on the Health Benefits - Dependents page.

## Page Used to Enroll Employees in Benefits Plans

| Page Name                | Object Name          | Navigation                                                                      | Usage                                                                                                        |
|--------------------------|----------------------|---------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|
| Health Benefit Elections | HEALTH_BENEFITS<br>1 | Define Business Rules,<br>Define General Data<br>(NLD), Use, Health<br>Benefits | Enroll employees and<br>dependents in health<br>plan types, such as<br>medical, dental, and<br>vision plans. |

## Enrolling Employees and Dependents

Access the Elections page.

Health Benefit Elections

Diepen, Maarten van ID: KN0010

**Plan Type** Find | View All First 1 of 1 Last

\*Plan Type:

**Coverage** Find | View All First 1 of 1 Last

\*Coverage Begin Date:  \*Deduction Begin Date:

Coverage Election: ☒ Elect ☐ Waive ☐ Terminate \*Election Date: 08/31/2001

Benefit Program: Benef NLD

Benefit Plan:  Option Code:

Coverage Code:

Health Provider ID:  ☐ Previously Seen

HIPAA Report Date (Emp):

HIPAA Report Date (Dep):  Employee Status: Active

**Enroll All Dependents**

**Dependent/Beneficiaries** 1 of 1

| *ID                  | Name | Relationship | Health Provider ID   | Prev Seen                |
|----------------------|------|--------------|----------------------|--------------------------|
| <input type="text"/> |      |              | <input type="text"/> | <input type="checkbox"/> |
|                      |      |              |                      |                          |

Health Benefits - Elections page

**Plan Type** Select a health plan type.

**Coverage Begin Date** Enter the date that coverage began. Press TAB to navigate to the **Deduction Begin Date** field. The system sets the **Deduction Begin Date** field to the date that appears in the **Coverage Begin Date** field. Change the **Deduction Begin Date** field if needed.

**Coverage Election** Use this option to define whether the employee is electing, waiving, or terminating coverage.

***Elect:*** Select if the employee elects coverage. Also enter today's date in the **Elect Date** field.

***Waive:*** Select if the employee doesn't elect coverage. Also enter the date the waiver starts in the **Elect Date** field.

***Terminate:*** Select if the employee is terminating coverage. Also enter the coverage termination date in the **Elect Date** field.

|                                       |                                                                                                                                                                                                                                                                                               |
|---------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Elect Date</b>                     | Use this field for the dates associated with the coverage election options.                                                                                                                                                                                                                   |
| <b>Benefit Plan</b>                   | Select the benefit plan from the list of values that appears when you click the magnifying glass button. Only the health benefit plans that you've associated with the employee's benefit program as of the deduction begin date appear in the list of available options.                     |
| <b>Coverage Code</b>                  | Select the coverage code that defines the kind of coverage that the employee wants, such as <b><i>Employee Only</i></b> or <b><i>Employee + Dependents</i></b> . The coverage code is linked to the benefit plan, so only coverage codes defined for the selected benefit plan are available. |
| <b>Health Provider ID</b>             | Use this field to track additional information about the employee's health provider. Enter the name of the provider ID number or any other provider-related information that the payroll system may require.                                                                                  |
| <b><i>Dependent/Beneficiaries</i></b> |                                                                                                                                                                                                                                                                                               |
| <b>ID</b>                             | Select the dependent/beneficiary ID. This information is entered on the Dependent/Beneficiary page. After selecting the ID, the dependent/beneficiary's Name and Relationship appear.                                                                                                         |
| <b>Health Provider ID</b>             | Use this field to track additional information about the dependent's health provider. Enter the provider ID number or any other provider-related information that the payroll system may require.                                                                                             |

---

**Important!** The **HIPAA Report Date (Emp)**, **HIPAA Report Date (Dep)**, and **Previously Seen** fields are for United States functionality and are not for operations in the Netherlands.

---

### **See Also**

"Setting Up Your Salary Administration System," Building Benefit Programs and Entering Dependents and Beneficiaries

## Enrolling Employees in Pension Plans

Use the Pension Plans component to enroll employees in pension plans and assign beneficiaries to those plans. Enroll the participant only in the pension plans associated with the benefit program that you enrolled the participant in and according to the effective dates of both the program and the benefit plan. The system checks both dates against your enrollment effective date.

Most benefit plan enrollment components consist of an Elections page and a Dependents or Beneficiaries page. Use the Elections pages to enroll participants in multiple plan types and benefit plan options. For example, if you look at the Pension Plans - Elections page, notice two scroll bars. The outer scroll bar enables you to move from plan type to plan type, while the inner scroll bar enables you to move about within the historical benefit data for each individual benefit plan option.

Use the Dependents or Beneficiaries pages to enroll dependents and assign beneficiaries in benefit plans. These pages have three scroll bars: the outer scroll bar controls plan type data, the middle scroll bar controls plan option information for the selected plan type, and the inner scroll bar scrolls through a list of the dependents and beneficiaries associated with the benefit plan enrollment. You can find an example of these three scroll bars on Pension Plans - Beneficiaries page.

---

### Page Used to Enroll Employees in Pension Plans

| <i><b>Page Name</b></i>     | <i><b>Object Name</b></i> | <i><b>Navigation</b></i>                                             | <i><b>Usage</b></i>                                                                                                             |
|-----------------------------|---------------------------|----------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------|
| Pension Plan Elections page | PENSION_PLAN1             | Define Business Rules, Define General Data (NLD), Use, Pension Plans | Enroll employees in pension plans and enter salary and contribution amount information that can be used for payroll processing. |

---

### Enrolling Employees and Dependents in Pension Plans

Access the Pension Plans page.

Pension Plan Elections

Bakker,Kees den ID: KN0003

**Plan Type** Find | View All First 1 of 1 Last

Plan Type: 80 Standard Pension

**Coverage** Find | View All First 1 of 1 Last

\*Deduction Begin Date: 01/01/1999

Participation Election: ☒ Elect ☐ Waive ☐ Terminate \*Election Date: 01/01/1999

Benefit Program: Netherlands Base Benefits

Benefit Plan: KNPENS Standard Pension Plan Option Code:

**Voluntary Contributions**

Flat Amount Contribution: 0.00 Or Percent of Earnings: 3.000

Salary for Pension Calculation: 109500.00 Employee Status: Active

Pension Plan Elections page (1 of 2)

Assign All Beneficiaries

**Dependent/Beneficiaries** 1 of 1

| ID | Name                     | Relationship | Percent of Benefit | Flat Amount | Excess | Contingent |
|----|--------------------------|--------------|--------------------|-------------|--------|------------|
| 01 | Versluis-den Bakker,Elly | Spouse       | 100                |             |        |            |

Total Primary Percent: 100  
Total Contingent Percent:

Update Totals

Pension Plan Elections page (2 of 2)

- Plan Type** Select a plan type to identify the type of pension plan in which your employee will enroll. In the previous example, the employee selected **80** (standard pension).
- Deduction Begin Date** Enter the date for employee contribution deductions to begin.
- Participation Election** Use this field to define whether the employee is electing, waiving, or terminating coverage. The default is **Elect** and today's date in the **Elect Date** field.
- Elect:** Select if the employee elects coverage, and enter today's date in the **Elect Date** field.
- Waive:** Select if the employee doesn't elect coverage, and enter the date that the waiver starts in the **Elect Date** field.
- Terminate:** Select if the employee is terminating coverage, and enter the coverage termination date in the **Elect Date** field.

|                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|--------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Elect Date</b>                                      | Use this field for the dates associated with the <b>Participation Election</b> field options.                                                                                                                                                                                                                                                                                                                                              |
| <b>Benefit Plan</b>                                    | Select the benefit plan. Only the pension plans that you've associated with the employee's chosen benefit program as of the effective date are available.                                                                                                                                                                                                                                                                                  |
| <b>Salary for Pension Calculation</b>                  | To calculate the pension using a salary other than the employee pay rate, enter the salary in this field.                                                                                                                                                                                                                                                                                                                                  |
| <b><i>Voluntary Contribution</i></b>                   |                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Flat Amount Contribution or Percent of Earnings</b> | Enter an amount that the employee will voluntarily contribute to the pension plan. This is an amount over the amount that you defined on the Pension Plan table.                                                                                                                                                                                                                                                                           |
| <b>Salary for Pension Calculation</b>                  | Enter the salary used for the pension calculations.                                                                                                                                                                                                                                                                                                                                                                                        |
| <b><i>Dependent/Beneficiaries</i></b>                  |                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Assign All Beneficiaries</b>                        | Click this button to view all beneficiaries currently entered into the system for this employee.                                                                                                                                                                                                                                                                                                                                           |
| <b>ID</b>                                              | Click here to locate beneficiary information by individual. Select each beneficiary for the plan.                                                                                                                                                                                                                                                                                                                                          |
| <b>Percent of Benefit and Flat Amount</b>              | For each beneficiary, define the pension distribution benefit by percent or flat amount field. The system calculates the total for all of the percentages you enter, which cannot exceed 100. If you entered a flat amount and more than one beneficiary, select one of the beneficiaries to receive any excess funds (because the estimated benefit may vary over time). Select the beneficiary by selecting the <b>Excess</b> check box. |
| <b>Excess</b>                                          | Select to allocate excess benefit funds to this dependent or beneficiary.                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Contingent</b>                                      | You have the option to indicate whether a beneficiary is primary or contingent. If the beneficiary is contingent, select this check box. If you set up a primary beneficiary to receive 100 percent of the benefit and you want to set up a secondary beneficiary, first set up the secondary beneficiary with zero percent.                                                                                                               |

## Reviewing Benefits Information

After you define setup table information for your salary administration system and enter the relevant information about pay methods, payments, and deductions for your employees, your

system is ready to provide information for payroll processing. Regardless of the payroll system that your organization uses, you can use the Benefits Summary pages in your salary administration system to view a summary of each employee's benefit data.

---

## Pages Used to Review Benefits Information

| <i>Page Name</i>                                                        | <i>Object Name</i> | <i>Navigation</i>                                                                     | <i>Usage</i>                                                                                                          |
|-------------------------------------------------------------------------|--------------------|---------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|
| Benefits Summary                                                        | BENEFITS_SUMMARY1  | Define Business Rules, Define General Data (NLD), Inquire, Benefits Summary           | View a summary of an employee's benefits participation in health, life, and accidental death and disability coverage. |
| Benefits Summary (PI DedCalc) (payroll interface deduction calculation) | BENEFITS_DED_SUMM1 | Define Business Rules, Define General Data (NLD), Inquire, Benefits Deduction Summary | View a summary of an employee's benefit deductions, such as health, life, and accidental death and disability plans.  |

## Establishing Employee General Deductions

Deductions are all payroll deductions for benefit plans and other general payments, not including taxes. General deductions are all payroll deductions other than those for benefits and taxes. Before you enter employee general deductions, first set up the general deductions in the Deduction table and the General Deduction table using a two-step process:

1. Use the Deduction table to specify, for all benefits deductions and general deductions, whether the deduction is permanent or incidental, and how the deduction affects taxes.
2. Define the actual calculation of the deduction on the General Deduction table or on the Benefits tables, depending on the type of deduction that you're setting up.

Use the General Deduction table for nonbenefit deductions, such as parking, union dues, or garnishments. Use the Benefits tables for benefit deductions, such as those for medical and life insurance plans. For each entry on the General Deduction table or the Benefits table, enter a corresponding entry on the Deduction table.

---

**Note.** Use the Incidental Deductions page to enter information about incidental deductions for your employees.

---

### See Also

"Setting Up Your Salary Administration System," Specifying How Deductions Are Processed and Defining General Deductions

## Common Elements Used in This Section

### General deductions

Generally those of the permanent or semipermanent type. The most common types of general deductions are loan payments, parking charges, and charitable contributions.

## Page Used to Establish Employee General Deductions

| Page Name                           | Object Name      | Navigation                                                                                | Usage                                                                                                                                                                                                                                     |
|-------------------------------------|------------------|-------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Deductions - General Deduction Data | GENL_DED_DATA_NL | Define Business Rules, Define General Data (NLD), Use, Deductions, General Deduction Data | Record information about general (not benefit-related) deductions for employees.<br><br>Depending on how you choose to implement your salary administration application, you can also use this page to enter employee benefit deductions. |

## Entering Data for General Deductions

Access the General Deduction Data page.

General Deduction Data

Bakker, Kees den Employee EmplID: KN0003 Empl Rcd#: 0

**Deductions Data Info** View All First 1 of 1 Last

\*Deduction Code: KN0001 Staff Association Contribution

**Deductions Data Details** View All First 1 of 1 Last

\*Effective Date: 01/01/1999 Deduction End Date:

Employee Status: Active

Currency Code:

**Deduction Calculation Routine**

- ☒ Default to Deduction Table
- ☐ Flat Amount
- ☐ Percentage

Deduction Rate or %:

Flat/Addl Amount: \$15.00

Goal Amount:

General Deduction Data page

|                                                              |                                                                                                                                                                                                                      |
|--------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Deduction Code</b>                                        | Select the deduction code. Remember, the codes that you select from on this page also need to have been defined on the General Deduction table.                                                                      |
| <b>Deduction End Date</b>                                    | Enter the effective deduction end date.                                                                                                                                                                              |
| <b>Currency Code</b>                                         | Select the currency in which the funds will be paid.                                                                                                                                                                 |
| <b>Deduction Calculation Routine</b>                         | Although you initially specified the calculation method for general deduction on the General Deduction table, you can override these settings for an individual employee by selecting new options in this group box. |
| <b>Default to Deduction Table</b>                            | Select to direct the system to use as the default the calculation routine specified on the General Deduction table.                                                                                                  |
| <b>Flat Amount</b>                                           | Select to direct the system to use a flat amount method of calculation.                                                                                                                                              |
| <b>Percentage</b>                                            | Select to direct the system to use a percentage method of calculation.                                                                                                                                               |
| <b>Deduction Rate or %</b><br>(deduction rate or percentage) | If you selected <b>Percentage</b> , enter the percentage in this field.                                                                                                                                              |
| <b>Flat/Addl Amount</b><br>(flat/additional amount)          | If you selected <b>Flat Amount</b> , enter the amount in this field.                                                                                                                                                 |
| <b>Goal Amount</b>                                           | Enter a goal amount to indicate the total cumulative amount for this deduction at which you want the deduction to stop.                                                                                              |

## Adding Employee Incidental Deductions

Incidental deductions are general deductions, other than benefits and taxes, which are applied to only one or two pay cycles. Incidental deductions apply to a time period that has definite start and end dates (the end date isn't left open indefinitely). A simple example of an incidental deduction is the settlement of a cash advance. Another type of incidental deduction is a one-time benefit deduction, such as an additional payment for a savings plan. An example of another type of incidental deduction is a vacation deduction from an employee's regular salary (which is offset during payroll processing by the payment of an equivalent amount of vacation pay).

## Page Used to Add Employee Incidental Deductions

| Page Name             | Object Name      | Navigation                                                                                          | Usage                                                                |
|-----------------------|------------------|-----------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|
| Incidental Deductions | DEDUCTION_INC_NL | Define Business Rules, Define General Data (NLD), Use, Incidental Deductions, Incidental Deductions | Enter various types of incidental deductions from an employee's pay. |

## Incidental Deductions Page

Access the Incidental Deductions page.

Incidental Deductions

Bakker, Kees den Employee EmplID: KN0003 Empl Rcd#: 0

**Incidental Deduction Details** View All First 1 of 1 Last

\*Effective Date: 01/01/2000 Company: Global Business Institute

Sequence: 0 Pay Group: Monthly - Netherlands

\*Plan Type: 00 General Benefit Program: Netherlands Base Benefits

Benefit Plan:

\*Deduction Code: KUHLTH Health Club Dues

Amount: Currency Code: \$600.00 ☒ OK to Pay

Rate/Pct: Goal Amount: \$600.00

Begin Period: End Period:

Comments: Yearly contribution for Health Club

Incidental Deductions page

### Plan Type

Select the plan type, which automatically uses a default of **00** (General) because most incidental deductions are general deductions rather than benefits deductions. Other one-time benefit deductions can be associated with other plan type codes.

### Benefit Plan

Enter a benefit plan.

### Deduction Code

Enter a deduction code for the incidental deduction. Deduction codes are associated with plan types on the Deduction Table Page, so the list shows only the deduction codes for the plan type that you just entered.

### Amount

Enter the amount of the deduction, depending on the type of incidental deduction entered.

### Currency Code

Enter the currency code for the deductions.

### Rate/Pct. (rate/percent)

Enter the rate or percent of the deduction, depending on the type of incidental deduction entered.

|                                    |                                                                                                                                                                                |
|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Goal Amount</b>                 | Enter the goal amount if you want to specify a total amount at which withholding of the deduction should stop.                                                                 |
| <b>OK to Pay</b>                   | Select to indicate approval if your organization has a procedure in place to first enter the incidental hours and then to obtain approval for payment of the incidental hours. |
| <b>Begin Period and End Period</b> | Enter the beginning and ending dates of the period for which the incidental deduction applies.                                                                                 |



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