

PeopleSoft®

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PeopleSoft 8.8  
Global Payroll for Japan PeopleBook

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**December 2002**

PeopleSoft 8.8  
Global Payroll for Japan PeopleBook  
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# About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

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**Note.** PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

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## PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications*.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by 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.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

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## PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, 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.

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## Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

### Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection Website. Through the Documentation section of PeopleSoft 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 that is delivered on your PeopleBooks CD-ROM.

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**Important!** Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

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### See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

### Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

### Web

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## Telephone

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## Email

Send email to CPI at [psoftpress@cc.larwood.com](mailto:psoftpress@cc.larwood.com).

## See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

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# Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

## Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
<b>Bold</b>	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply.  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.
Monospace font	Indicates a PeopleCode program or other code example.
(quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ( ).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	<p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p>
(ISO)	<p>Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses.</p> <p>The code for the U.S. federal government is USF; the code for education and government is E&amp;G, and the country codes from the International Standards Organization are used for specific countries. Here is an example:</p> <p>(DEU) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.</p>
Cross-references	PeopleBooks provide cross-references either below the heading See Also or on a separate line preceded by the word <i>See</i> . Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

## Visual Cues

PeopleBooks contain the following visual cues.

### Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

---

**Note.** Example of a note.

---

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

---

**Important!** Example of an important note.

---

## Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

---

**Warning!** Example of a warning.

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## Comments and Suggestions

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

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

Or send email comments to [doc@peoplesoft.com](mailto:doc@peoplesoft.com).

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

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## Common Elements in These PeopleBooks

<b>As of Date</b>	The last date for which a report or process includes data.
<b>Business Unit</b>	An ID 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>Description</b>	Enter up to 30 characters of text.
<b>Effective Date</b>	The date on which a table row becomes effective; the date that an action begins. For example, 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>Once, Always, and Don't Run</b>	Select <b>Once</b> to run 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> . Select <b>Always</b> to run the request every time the batch process runs. Select <b>Don't Run</b> to ignore the request when the batch process runs.

<b>Report Manager</b>	Click to access 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>Process Monitor</b>	Click to access the Process List page, where you can view the status of submitted process requests.
<b>Run</b>	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
<b>Request ID</b>	An ID that represents a set of selection criteria for a report or process.
<b>User ID</b>	An ID that represents the person who generates a transaction.
<b>SetID</b>	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
<b>Short Description</b>	Enter up to 15 characters of text.

### **See Also**

*Using PeopleSoft Applications*

*PeopleSoft Process Scheduler*



# PeopleSoft Global Payroll for Japan Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleBook structure.

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**Note.** This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

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## PeopleSoft Application Fundamentals

The *PeopleSoft Global Payroll for Japan PeopleBook* provides implementation and processing information for your PeopleSoft Global Payroll for Japan system. Additionally, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

*PeopleSoft Application Fundamentals for HRMS PeopleBook* consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft HRMS product line. No matter which PeopleSoft HRMS products you are implementing, 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.

### See Also

*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*

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## PeopleBook Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use this PeopleBook more efficiently.

Chapters	Description
Preface	This is the chapter you're reading now. It discusses: <ul style="list-style-type: none"><li>• How to use the Application Fundamentals book.</li><li>• How PeopleBooks are structured.</li></ul>

Chapters	Description
Getting Started With...	<p>This chapter discusses product implementation guidelines. It discusses:</p> <ul style="list-style-type: none"> <li>• The business processes documented within the book.</li> <li>• Integrations between the product and other products.</li> <li>• A high-level guide to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.</li> </ul>
Understanding...	<p>This is an introductory chapter that broadly discusses the product and the functionality within the product.</p>
Setup and Implementation	<p>This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality.</p> <p><b>Note.</b> There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.</p>
Business Process	<p>This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of a product, this chapter would explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality.</p> <p><b>Note.</b> There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.</p>

<b>Chapters</b>	<b>Description</b>
Appendixes	(optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Reports Appendix	(optional) This appendix contains an abbreviated list of all of the product's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.



# CHAPTER 1

## Getting Started with PeopleSoft Global Payroll for Japan

This chapter provides an overview of PeopleSoft Global Payroll for Japan business processes and discusses implementation tasks.

---

### PeopleSoft Global Payroll for Japan Business Processes

The following are the PeopleSoft Global Payroll for Japan business processes:

- Salary and bonus
- Time data entry
- Termination processing
- Commuting allowance
- Social insurance
- Labor insurance
- Inhabitant tax
- Income tax
- Year-end adjustment
- Banking
- Payslips

We cover these business processes in the business process chapters in this PeopleBook.

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### PeopleSoft Global Payroll for Japan Implementation

The PeopleSoft Global Payroll for Japan table-loading implementation includes setting up the following:

- Fundamental HRMS tables, common to multiple PeopleSoft HRMS applications.
- PeopleSoft Human Resources tables.
- PeopleSoft Global Payroll core application tables.
- PeopleSoft Global Payroll for Japan country extension tables.

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including installation guides and table-loading sequences.

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**Important!** The order in which you set up tables required to implement PeopleSoft Global Payroll for Japan may vary; each individual application isn't necessarily set up in sequence. For example, you may set up Human Resources tables, then tables for the Global Payroll core application, then several tables specific to the country extension, followed by additional Global Payroll core tables. In addition, the order in which you set up tables may also depend on the features you want to use and whether you're implementing one or multiple Global Payroll country extensions. The information provided in this chapter offers a high-level guide of how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.

---

## Setting Up PeopleSoft HRMS Fundamental Tables

PeopleSoft Global Payroll for Japan requires the setup of fundamental HRMS tables, common to multiple HRMS applications. The information that you define on these tables lays the foundation for the PeopleSoft Global Payroll for Japan setup.

Step	Reference
1. Set up PeopleSoft HRMS fundamental tables.	

## Setting Up PeopleSoft Human Resources Tables

PeopleSoft Global Payroll for Japan requires the setup of tables in various PeopleSoft Human Resources business processes. The following table lists Human Resources setup steps important to the PeopleSoft Global Payroll for Japan implementation, not all required steps.

Step	Reference
1. Set up data for employee dependents required for income tax withholding.	<i>PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce</i> , "Entering Additional Data in Human Resources Records," Tracking Dependent and Beneficiary Data
2. Verify that monthly salaried employees who are subject to overtime have the frequency JM assigned on the Job Data-Compensation page.	<a href="#">Chapter 3, "Defining Country Data for Japan," Setting Up Pay Types</a> , page 18

## Setting Up PeopleSoft Global Payroll Core Application Tables

PeopleSoft Global Payroll for Japan requires the setup of various tables in the PeopleSoft Global Payroll core application.

Step	Reference
1. Set up PeopleSoft Global Payroll core application tables.	<ul style="list-style-type: none"> <li><i>PeopleSoft 8.8 Global Payroll PeopleBook</i>, "Getting Started With PeopleSoft Global Payroll"</li> <li><a href="#">Chapter 14, "Working with Banking in Japan," Setting Up Banking</a>, page 103</li> </ul>

## Setting Up PeopleSoft Global Payroll for Japan Tables

The steps discussed in this section suggest an order in which you define information on your PeopleSoft Global Payroll for Japan tables.

Step	Reference
1. Record the establishment numbers assigned to your organization by income and inhabitant tax, social insurance, and labor insurance agencies.	<a href="#">Chapter 4, “Setting Up Insurance, Taxes, and Payslips,” Setting Up Tax and Insurance Establishments , page 24</a>
2. Assign a file handle and specify the character set for each external file that you want to import or export.	<a href="#">Chapter 3, “Defining Country Data for Japan,” Setting Up File Handles , page 21</a>
3. Map compensation rate codes set up in PeopleSoft Human Resources to the PeopleSoft Global Payroll for Japan rate codes.	<a href="#">Chapter 5, “Working With Salary and Bonus ,” Setting Up for Salary Processing , page 37</a>
4. Enter or update the default value of the variables for calculating overtime pay and pay cut due to absence.	<a href="#">Chapter 5, “Working With Salary and Bonus ,” Setting Up for Salary Processing , page 37</a>
5. Configure time data variables to conform to your organization’s business rules.	<a href="#">Chapter 6, “Tracking Time Data ,” Preparing to Enter Time Data , page 42</a>
6. Define municipality codes and associate them with salary payers.	<a href="#">Chapter 4, “Setting Up Insurance, Taxes, and Payslips,” Setting Up for Inhabitant Tax Processing , page 29</a>
7. Enter the default social insurance premium rates for each social insurance establishment	<a href="#">Chapter 4, “Setting Up Insurance, Taxes, and Payslips,” Setting Up for Social Insurance Processing , page 27</a>
8. Define payslip positions and templates.	<a href="#">Chapter 4, “Setting Up Insurance, Taxes, and Payslips,” Setting Up Payslips , page 30</a>
9. Define maximum non-taxable toll compensation and the commuting allowance amounts for each employee.	<a href="#">Chapter 8, “Managing Commuting Allowance ,” Entering Commuting Allowance Amounts , page 50</a>
10. Set up employee social insurance data.	<a href="#">Chapter 9, “Managing Social Insurance ,” Preparing Employee Social Insurance Data , page 57</a>
11. Enter labor insurance data for each employee.	<a href="#">Chapter 10, “Managing Labor Insurance ,” Entering Labor Insurance Information , page 70</a>
12. Enter employee, spouse, and dependent tax information.	<a href="#">Chapter 12, “Withholding Income Tax ,” Preparing for Income Tax Withholding , page 84</a>
13. Enter deduction and prior employment data.	<a href="#">Chapter 13, “Preparing Year End Adjustment ,” page 89</a>





## CHAPTER 2

# Understanding PeopleSoft Global Payroll for Japan

This section provides an overview of your Global Payroll country extension and discusses:

- PeopleSoft Global Payroll for Japan business processes.
- PeopleSoft Global Payroll for Japan Integrations.
- Delivered Elements for Japan.
- The naming convention for delivered elements.
- How to view delivered elements.

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## PeopleSoft Global Payroll for Japan

PeopleSoft Global Payroll for Japan is a “country extension” of the core PeopleSoft Global Payroll application. It provides the payroll rules and elements needed to run a Japanese payroll.

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## PeopleSoft Global Payroll for Japan Business Processes

PeopleSoft Global Payroll for Japan supports the following business processes:

- Salary and Bonus

PeopleSoft Global Payroll for Japan provides the necessary elements to calculate earnings and deductions for salary and bonus for four pay types—monthly exempt, monthly non-exempt, daily, and hourly. Map your Global Payroll for Japan system to the base pay compensation rate codes in employees’ compensation packages and enter bonus amounts through positive input. Include commuting allowance in monthly payroll, adjust salaries for overtime and absence, and deduct social insurance and labor insurance premiums, income tax, and inhabitant tax as required by law.

- Time Data

Flexible rules enable tracking time data for the purpose of calculating salaries and tracking paid time off (PTO). Use variables for processing workdays, overtime, holidays, tardiness, absence, PTO, sick leave, and special leave. Use delivered formulas to track PTO entitlements, takes, and balances. Define processing of PTO carried over from the previous year according to your organization’s practices.

- Commuting Allowance

PeopleSoft Global Payroll for Japan provides the elements necessary to calculate and track payments of cash, Manchus, taxable, and nontaxable commuting allowances in frequencies of one day, one month, three months, and six months. The default monthly maximum nontaxable commuting allowance is provided as system data. You can define the maximum nontaxable toll compensation for each employee and input the value of each employee's commuting allowance components. The system generates payment in the appropriate month and also tracks the value of the commuting allowance for monthly remuneration calculation.

- Social Insurance

PeopleSoft Global Payroll for Japan provides variables, formulas, earnings and deductions, and other rules to calculate and track all aspects of social insurance premium. The system calculates health insurance premiums, pension insurance premiums, and nursing care insurance premiums. It also calculates and tracks average monthly remuneration to support the regular decision process and to identify employees subject to occasional revision. A set of social insurance reports helps you complete your social insurance business process.

- Labor Insurance

PeopleSoft Global Payroll for Japan calculates the employee contribution for employment insurance premiums using the appropriate premium rate for the industry type based on the employee's total wages. The system also tracks short time labor insured workers, determines exemption from employment insurance, and supports labor insurance reporting.

- Inhabitant Tax

PeopleSoft Global Payroll for Japan provides rules, pages, processes, and reports that you use to prepare Wage Payment reports and summaries for municipalities, load inhabitant tax amounts received from the municipalities, deduct inhabitant tax amounts from monthly salary, and prepare monthly inhabitant tax reports for municipalities.

- Income Tax

PeopleSoft Global Payroll for Japan provides rules to calculate and deduct income tax from both salary and bonus and to adjust income tax on the final payment of the year. Use the Withholding Tax Register report to meet the statutory monthly reporting requirement.

- Year-End Adjustment

The delivered rules satisfy Japanese statutory and business requirements for year-end adjustment of the final salary or bonus payment and for independent year-end adjustment as needed. After year-end adjustments are complete and you prepare your data tables, you can generate the necessary reports to complete the year-end adjustment business process.

- Banking

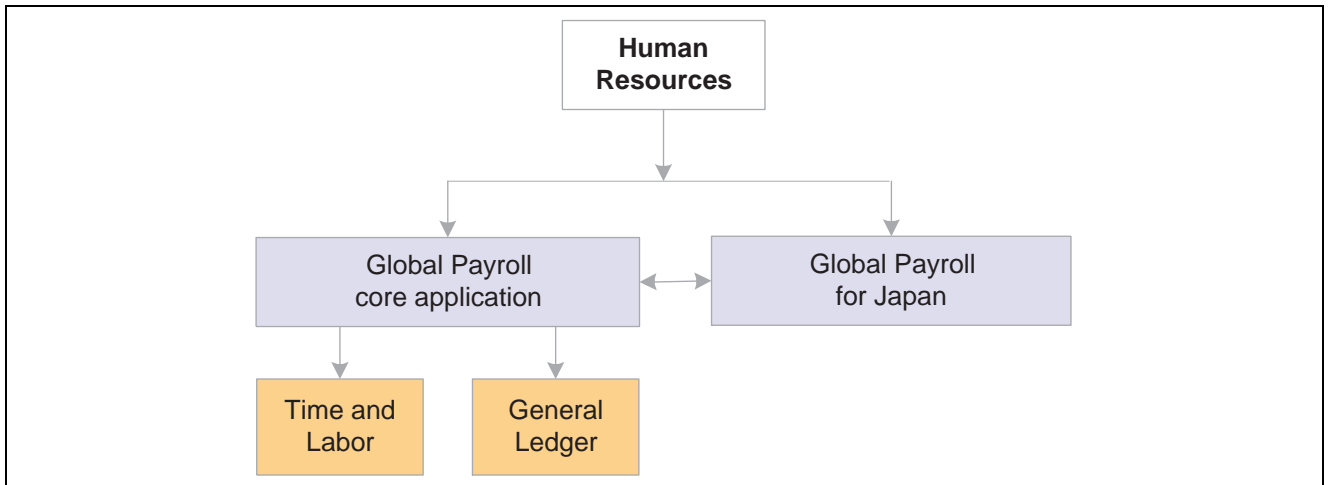
PeopleSoft Global Payroll for Japan supports electronic transfers from multiple company accounts to multiple employee accounts. For each employee, you can define the distribution amounts to multiple banks separately for salary and bonus. We provide the direct deposit file in a common format used by all banks in Japan.

- Payslips

PeopleSoft Global Payroll for Japan enables you to print payslips for monthly salaries and bonuses. Because the format of payslips varies greatly from one company to another, we provide one format as an example. We also provide a template that enables you to customize the format to accommodate the payslip style your organization uses.

## PeopleSoft Global Payroll for Japan Integrations

PeopleSoft Global Payroll for Japan integrates with the following PeopleSoft applications:



PeopleSoft Global Payroll for Japan integration with other PeopleSoft applications

We cover integration considerations in this PeopleBook.

## Understanding Delivered Elements

PeopleSoft Global Payroll defines each business process for Japan in terms of delivered elements and rules. Some of these elements and rules are specifically designed to meet legal requirements, while others support common or “customary” payroll practices.

### Creating Delivered Elements

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

The core application has the following characteristics:

- It consists of a payroll rules engine—a flexible tool that enables users to define the rules and elements of their payroll system and execute payroll and absence calculations. PeopleSoft Global Payroll does not embed payroll-specific logic or computations in application code. Instead, it specifies all business application logic, such as earnings, deductions, absences, and accumulators, in terms of payroll rules and elements. PeopleSoft Global Payroll enables the user to enter and maintain payroll rules through a set of pages and offers a comprehensive set of features that enable the user to work in their preferred language or currency.

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

Country extensions have the following characteristics:

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

## Element Ownership and Maintenance

The delivered elements and rules of your Global Payroll country extension can be classified based on whether they are owned and maintained by the customer or by PeopleSoft. Some elements and rules are maintained exclusively by PeopleSoft and cannot be modified or reconfigured, while others can be configured to meet requirements unique to your organization.

### Understanding Element Ownership in PeopleSoft Global Payroll

PeopleSoft Global Payroll has the following five categories of element ownership:

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

### Understanding Element Ownership in PeopleSoft Global Payroll for Japan

The following table illustrates the approach to element ownership and maintenance in PeopleSoft Global Payroll for Japan.

Functional Area	Ownership	Class
Absence and Overtime	PS Delivered/Not Maintained	Customary
Commuting Allowance	PS Delivered/Maintained	Statutory
Earnings	PS Delivered/Not Maintained	Customary (Base pay items)

Functional Area	Ownership	Class
	PS Delivered/Not Maintained	Statutory (Other items)
Income Tax	PS Delivered/Maintained	Statutory
Inhabitant Tax	PS Delivered/Maintained	Statutory
Labor Insurance	PS Delivered/Maintained	Statutory
Social Insurance	PS Delivered/Maintained	Statutory
Year-End Adjustment	PS Delivered/Maintained	Statutory

### See Also

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Defining General Element Information,”  
Defining an Element Name (GP\_PIN)

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## Naming Elements

Understanding the naming convention developed for PeopleSoft-delivered elements can help you determine how an element is used, the element type, and even the functional area it serves. Depending on whether the element is a primary element, a component of a primary element, or a supporting element, one of the following naming conventions applies:

- Supporting elements.
- Primary elements.
- Component names (suffixes).

This section also discusses how the following are used in the names of Japanese elements:

- Functional area codes for Japan.
- Element type codes (PIN\_TYPE).
- Abbreviations in element names for Japan.
- Suffixes for Japan.
- Industry and regions feature.

## Supporting Elements

PeopleSoft Global Payroll for Japan uses the naming convention FF TT NAME for arrays, brackets, counts, dates, durations, formulas, rate codes, variables, historical rules, fictitious calculation rules, proration rules, rounding rules, accumulators, sections, element groups, and generation control conditions. Following is an explanation of the components of the naming convention:

<b>FF</b>	Functional area code.
<b>TT</b>	Type of supporting element.
<b>NAME</b>	The description of the element.

For example, in the Social Insurance variable SC VR MONTH REM, SC represents the functional area (Social Insurance), VR represents the element type (variable), and MONTH REM stands for monthly remuneration.

## Primary Elements

PeopleSoft Global Payroll does not use type codes in primary element names. PeopleSoft Global Payroll for Japan uses the naming convention FF NAME for earnings and deductions elements, which are primary elements.

<b>FF</b>	Functional area code.
<b>NAME</b>	The description of the element.

For example, in the earnings item CM TX ALW, CM represents the functional area (commuting allowance) and TX ALW stands for taxable commuting allowance. In the earnings item ER BASE PAYM, ER represents the functional area (for elements related to earnings contributions but not related to any other specific functional area) and BASE PAYM stands for monthly base pay.

## Component Names (Suffixes)

When you create an earning or deduction element in PeopleSoft Global Payroll, you must define the components that make up the element, such as base, rate, unit, and percentage. The system automatically generates the components and accumulators for the element based on the calculation rule or accumulator periods. The system also names the components and accumulators by appending a suffix to the element's name.

For example, you define the earnings element named EARN1 with the calculation rule  $EARN1 = \text{Rate} \times \text{Unit}$ . The system automatically creates two additional elements for the components in the calculation rule: a rate element called EARN1\_RATE and a unit element called EARN1\_UNIT.

In PeopleSoft Global Payroll for Japan, all suffixes fall into one of the following types:

- Separator.
- Earnings/deductions component suffixes.
- Earnings/deductions accumulator suffixes.
- Deduction arrears component suffixes.

## See Also

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Defining General Element Information,”  
Defining Suffixes for Components and Accumulators

## Functional Area Codes for Japan

The following table contains the functional area codes used in the names of Japanese elements.

Functional Area Code	Description
AO	Absence and Overtime
CM	Commuting Allowance
ER	Earnings Contributions (Used for elements that are related to earnings contributions but not specifically related to another functional area.)
IH	Inhabitant Tax
IN	Income Tax
LA	Labor Insurance
SC	Social Insurance
YE	Year-End Adjustment

## Element Type Codes (PIN\_TYPE)

The following table contains codes for all the element types. Because not all element types are delivered for Japan, not all of these codes appear in the names of Japanese elements.

Element Type Code	Description
AE	Absence Entitlement
AT	Absence Take
AC	Accumulator
AR	Array
AA	Auto Assigned
BR	Bracket

Element Type Code	Description
CT	Count
DT	Date
DD	Deduction
DR	Duration
ER	Earnings
EG	Element Group
EM	Error Message
FC	Fictitious Calculation
FM	Formula
GC	Generation Control
HC	Historical Rule
PP	Previous Period Rule
PR	Process
PO	Proration Rule
RC	Rate Code
RR	Rounding Rule
SE	Section
SY	System Element
VR	Variable



## Abbreviations in Element Names for Japan

The following table lists some of the common abbreviations used in the names of Japanese elements.

Abbreviation	Description
ABS	Absence
AC	Actual Result
ADJ	Adjusted
ALW	Allowance
ANU	Annual
BAL	Balance
BON	Bonus
CD	Code
CHG	Change
CU	Current
D	Daily
DED	Deduction
DFT	Default
EST	Establishment
GR or GRD	Grade
HRS or H	Hours, Hourly
JDG	Judge, evaluate, determine
M	Monthly

Abbreviation	Description
MON	Month
MX	Maximum
NO	Number
NOM	Normal
NX	Next
O	Occasional
PR	Previous
PRM	Premium
PTO	Paid Time Off
RED	Reduction
REM	Remuneration
R	Regular
SAL	Salary
SK L or SCLE	Sick Leave
SP L or SPLE	Special Leave
STA	Standard
T	Hourly
TM	Time
TTL	Total

Abbreviation	Description
WRK	Work
YR	Year

## Suffixes for Japan

PeopleSoft Global Payroll for Japan uses the default core PeopleSoft Global Payroll suffixes.

### See Also

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Defining General Element Information,”  
Defining Suffixes for Components and Accumulators

## Industry and Regions Feature

We have not used the industry and regions feature in defining elements for Japan.

---

## Viewing Delivered Elements for Japan

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

### See Also

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Delivered Elements and System Data”



## CHAPTER 3

# Defining Country Data for Japan

This chapter provides an overview of PeopleSoft Global Payroll for Japan system setup and discusses how to:

- Set up variables for time tracking.
- Set up file handles.

---

## Understanding General System Setup

This section provides general information about how we set up the delivered elements in PeopleSoft Global Payroll for Japan. It also provides some notes and cautions about using and configuring the system.

This section discusses how to:

- Use base pay and other PeopleSoft Human Resources data.
- Define pay entity.
- Set up pay types.
- Set up calendar group IDs.
- Understand retroactive pay calculations.
- Use the delivered writable array.

## Using Base Pay and other PeopleSoft Human Resources Data

Your PeopleSoft Global Payroll for Japan application is designed to use company data and employee personal and job data entered in your PeopleSoft Human Resources application. We provide the necessary PeopleSoft Global Payroll rules, Structured Query Reports (SQRs), and application engine programs to manage the HR data needed for payroll processing.

### Mapping Base Pay Rate Codes

In calculating base pay, PeopleSoft Global Payroll for Japan uses the employee's compensation package that you define using compensation rate codes in PeopleSoft Human Resources. As sample data, we deliver 3 generic rate codes for PeopleSoft Global Payroll for Japan (J08–J10) and map them to 3 generic base pay rate codes in HR (J08–J10). Add, remap, and modify these rate codes as required, as long as the HR rate codes that you map to have the Base Pay check box selected on the Comp Rate Code table.

**See Also**

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Defining Data Retrieval Elements,” Defining Rate Codes Chapter 5, “Working With Salary and Bonus ,” Base Pay Setup , page 35

**Defining Pay Entity**

The pay entity is a legal definition of an organization from a payroll perspective; it is the organization that is responsible for making payments to payees. Often the organization and the pay entity are the same. Use the Pay Entity component in the core PeopleSoft Global Payroll application to define pay entities for your organization.

If your social insurance establishments, labor insurance establishments, and tax establishments for income tax and inhabitant tax are smaller organizations than the pay entity, define them on the Tax Establishment page described in this chapter. You must have at least one tax establishment defined for social insurance, labor insurance, income tax, and inhabitant tax even if the pay entity as defined is the same as each of these establishments.

**See Also**

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Defining the Organizational Structure,” Defining Pay Entities

**Setting Up Pay Types**

PeopleSoft Global Payroll for Japan uses the variable ER VR PAY TYPE to identify the employee’s pay type. As delivered, the formula ER FM BASE RATE assigns the value of this variable according to the employee’s compensation frequency on the Job Data Compensation record in PeopleSoft Human Resources. Valid PeopleSoft Human Resources compensation frequencies for Japan are:

<b>M (monthly)</b>	Monthly salaried employees who are not subject to overtime payment.
<b>JM (daily-monthly)</b>	Monthly salaried employees who are subject to overtime payment.
<b>D (daily)</b>	Employees compensated on a daily basis.
<b>H (hourly)</b>	Employees compensated on an hourly basis.

---

**Note.** It is important to verify that monthly salaried employees who are subject to overtime payment are assigned the JM frequency on the Job Data-Compensation page in PeopleSoft Human Resources.

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**See Also**

*PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce*, “Hiring Your Workforce,” Entering Employee Compensation Information

**Setting Up Calendar Group IDs**

Set up calendar group IDs that are meaningful to your organization and payroll processing periods. Each calendar group can have only one run type, which means you must set up a unique calendar group ID for each regular, bonus, or year-end tax adjustment pay run. As sample data, PeopleSoft provides five run types for Japan: salary, bonus, year-end adjustment on bonus, year-end adjustment on salary, and independent year-end adjustment.

## See Also

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Using Calendars”

## Understanding Retroactive Pay Calculations

The PeopleSoft Global Payroll for Japan application provides the necessary elements for processing retroactive changes in base salary. Following is a summary of how the application processes retroactive changes:

- The trigger for retroactive base salary processing is any change in the HR Job Data Compensation record (COMPENSATION).

Because this record is a child of Job Data record, changes in both the Compensation record and the Job Data record trigger of retroactive processing.

- The following elements are adjusted for retroactive processing:

ER BASE PAYM, ER BASE PAYD, ER BASE PAYH, ER OVERTIME, ER NIGHT, ER HOLIDAY, ER HOLNIG, ER TAED RED, ER SPLE RED, ER ABS RED, ER SCLE RED, SC REM S01, SC REM S02, SC REM S03, SC REM S04, SC REM S05, SC REM S06, SC REM S07, SC REM S08, SC REM S09, SC REM S10, SC REM S11, SC REM S12.

- Social insurance processing tracks retroactive changes when calculating monthly remuneration and when determining eligibility for occasional revision.

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**Note.** When you add a retroactive data row in PeopleSoft Human Resources records, it is important that you place your cursor in the row of data that you want carried forward into your new row. You must manually update any existing data rows that come after your inserted row if you want your new data to be carried forward into the remaining rows of the table.

---

## Payment Keys

We recommend that Japan organizations do not use payment keys when configuring payroll for Japan.

## Caution about Element Segmentation

We recommend that you do not use the segmentation feature of PeopleSoft Global Payroll. If you choose to use segmentation, review all of your report output thoroughly for accuracy; segmentation could impact the data being reported.

## See Also

*PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce*, “Updating Workforce Information,” Updating Effective-Dated Job Data

## Using the Delivered Writable Array

PeopleSoft Global Payroll for Japan delivers the writable array GPJP\_WA\_PIN, which stores data used in PeopleSoft Application Engine and SQR programs.

## See Also

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Defining Data Retrieval Elements,” Working With Writable Arrays

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## Setting Up Variables for Time Tracking

You must configure the delivered variables to conform to your organization's business rules. Then you can enter time data for each employee each pay period before running payroll.

Here's how you set up variables:

1. Configure variables for overtime and absence.
  - PeopleSoft delivers four variables for overtime and four variables for pay cut due to absence. You can add additional variables to track additional types of overtime or absence.
  - PeopleSoft delivers five additional variables for tracking time data, such as PTO take and compensatory day off. We also deliver a "dummy" Earnings Element for each of these variables to enter the time data through positive input.
  - Remember to create corresponding variables for the overtime premium ratio and reduction ratio.
  - If you use the variables you added to calculate overtime pay, pay-cut for absence, or any other pay calculations, remember to create or modify formulas and other rules accordingly.
2. Change the delivered value of the variable AO VR PR PRI FLAG if your organization deducts PTO from the current year first.
3. Change the delivered value of the variable AO VR ENT MONTHS if your organization entitles PTO as of a month other than October.
4. Set up your PTO entitlement schedule.

PeopleSoft delivers four variables for scheduling PTO entitlement according to length of service.

- Add new variables and define rules to evaluate length of service if necessary to conform to your organization's entitlement schedule.
- Define the amount of PTO entitlement associated with each variable.
- Change the default value of the variable AO VR PTO EXP FLAG if untaken PTO for the previous year expires at PTO entitlement.

### See Also

[Chapter 6, "Tracking Time Data," page 41](#)

*PeopleSoft 8.8 Global Payroll PeopleBook*, "Defining Calculation Elements"

*PeopleSoft 8.8 Global Payroll PeopleBook*, "Setting Up Overrides"

*PeopleSoft 8.8 Global Payroll PeopleBook*, "Defining Calculation Elements," Viewing or Updating the Values of Variables in the Same Category



## Setting Up File Handles

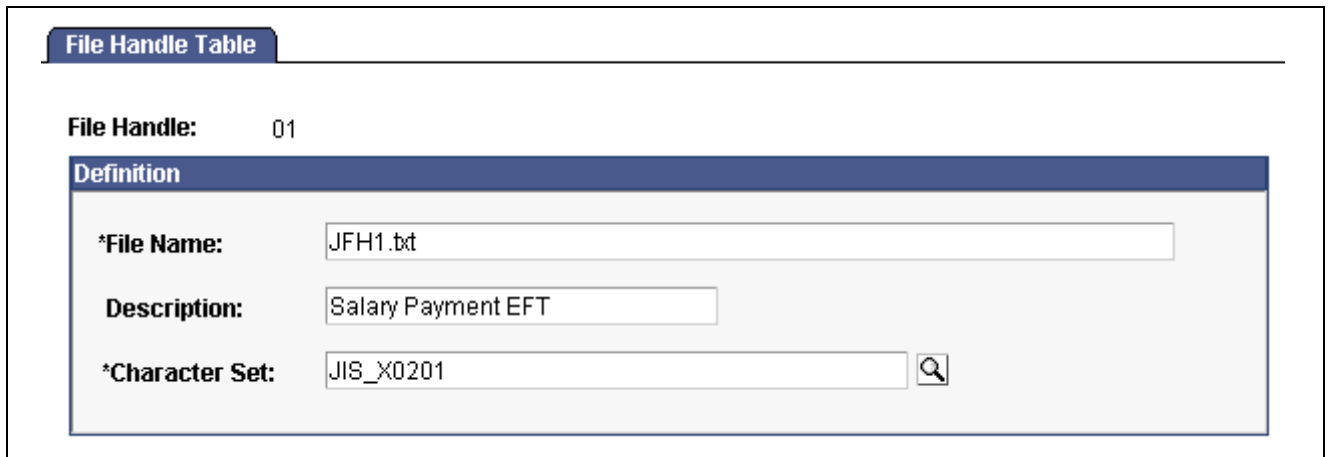
If you plan to use electronic files to transfer payroll funds electronically or to load inhabitant tax amounts from municipalities, you must set up file handles. A file handle instructs the application engine program on the file name and character set to use.

### Pages Used to Set Up File Handles

Page Name	Object Name	Navigation	Usage
File Handle Table	GPJP_FILE_HANDL	Set Up HRMS, Product Related, Global Payroll, Reports, File Handles JPN	Assign a handle to each external file that you want to import or export.

### Assigning File Handles

Access the File Handle Table page.



The screenshot shows the 'File Handle Table' page. At the top, there is a tab labeled 'File Handle Table'. Below it, the 'File Handle:' field is set to '01'. A 'Definition' section is expanded, showing three input fields: '\*File Name:' with the value 'JFH1.txt', 'Description:' with the value 'Salary Payment EFT', and '\*Character Set:' with the value 'JIS\_X0201'. A magnifying glass icon is visible next to the Character Set field.

File Handle Table page

- File Handle** Assign a unique two-character file handle to each file that you want to import or export. The file handle can be any combination of alphanumeric characters.
- File Name** The exact path (including file name) to the file. Use the proper syntax for your operating system.
- Character Set** Select the character set in which the file is imported or exported.  
For file handles related to banking, select JIS\_X0201.



## CHAPTER 4

# Setting Up Insurance, Taxes, and Payslips

This chapter provides an overview of tax and insurance establishments, defines common tax and insurance elements and discusses how to:

- Set up tax and insurance establishments.
- Set up for social insurance processing.
- Set up for inhabitant tax processing.
- Set up payslips.

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## Common Tax and Insurance Terms and Elements

The following are common terms and elements used in insurance and tax processing throughout PeopleSoft Global Payroll for Japan:

<b>Object Year</b>	Generally refers to the year for which you want to run a process or report. Sometimes the object year is not a calendar year, as in the case of labor insurance (April 1 of the previous year to March 31 of the object year) and inhabitant tax (June 1 of the object year to May 31 of the following year).
<b>Tax Establishment</b>	A company or a suborganization of a company, such as a local office, that is responsible to collect (deduct) income and inhabitant tax from employees, and to pay the tax to the income tax agency and municipalities.
<b>Salary Payer</b>	A Salary Payer is defined as a tax establishment.
<b>Salary Payer Reference Number</b>	The number assigned to the salary payer by the income tax agency.
<b>Taxpayer Specification Number</b>	The number assigned to the salary payer by the municipality.
<b>Labor Insurance Establishment</b>	A company or a suborganization of a company, such as a local office, that is responsible to collect (deduct) labor insurance premiums from employees and to pay the premiums to the labor insurance agencies.
<b>Social Insurance Establishment</b>	A company or a suborganization of a company, such as a local office, that is responsible to collect (deduct) social insurance premiums from employees and to pay the premiums to the social insurance agencies.

## Setting Up Tax and Insurance Establishments

This section provides an overview and discusses how to:

- Define tax establishments.
- Define social insurance establishments.
- Define labor insurance establishments.

### Understanding Tax and Insurance Establishments

The Tax Establishment table holds the establishment numbers assigned by the income and inhabitant tax, social insurance, and labor insurance agencies. These numbers might apply to your entire organization or to parts of your organization. You must setup each establishment number and provide some additional data for each before you begin to process payrolls.

This chapter discusses how to define establishment IDs. Later chapters explain how to relate these establishment IDs to individual employees.

### Pages Used to Set Up Tax and Insurance Establishments

Page Name	Object Name	Navigation	Usage
Tax /Insurance Est.	GPJP_TAX_ESTAB	Set Up HRMS, Product Related, Global Payroll, Taxes, Tax Establishment JPN	Record the establishment numbers assigned to your organization by income and inhabitant tax agencies. Provide address and additional information related to each establishment.
Social Ins Establishment	GPJP_TAX_ESTAB2	Set Up HRMS, Product Related, Global Payroll, Social Security / Insurance, Social Ins Establishment JPN	Record the establishment numbers assigned to your organization by the social insurance agency. Provide address and additional information related to each establishment.
Labor Ins Estab	GPJP_TAX_ESTAB3	Set Up HRMS, Product Related, Global Payroll, Social Security / Insurance, Labor Ins Establishment JPN	Record the establishment numbers assigned to your organization by the labor insurance agency. Provide address and additional information related to each establishment.

### Defining Tax Establishments

Access the Tax/Insurance Est. page.

The screenshot shows a web form titled "Tax/Insurance Est." with a sub-header "Tax/Insurance Est." in a blue box. Below the header, there are two fields: "Tax/Ins Establishment:" with the value "KJI000000001" and "Tax/Ins Establishment Type:" with the value "Tax Establishment".

The main section is titled "Address Information" in a blue box. It includes a search bar with "Find | View All" and navigation buttons "First", "1 of 1", and "Last". There are also "+" and "-" buttons. The form contains the following fields:

- \*Effective Date: 01/01/2001 (with a calendar icon)
- Description: Carrot Soft Corp.
- Short Description: (empty)
- Country: JPN (with a search icon) Japan
- Address: 154-0004, Tokyo-To Setagaya-Ku, Taishido 4-4-1 (with an "Edit Address" link)
- Phone: 035/432-7700

Below the address information is a section titled "Salary Payer Data" in a blue box. It contains a "Calculation Method:" dropdown menu set to "Computer".

Tax/Insurance Est. page

### Salary Payer Data

#### Calculation Method

Select whether this salary payer (income tax establishment) calculates income tax by the computer calculation or tax table lookup method when an employee's income tax type is KOU. Valid values are *Computer* and *Table*.

#### See Also

Chapter 4, "Setting Up Insurance, Taxes, and Payslips," Common Tax and Insurance Terms and Elements , page 23

## Defining Social Insurance Establishments

Access the Social Ins Establishment page.

Social Ins Establishment

---

**Tax/Ins Establishment:** KJI000000001      **Tax/Ins Establishment Type:** Tax Establishment

Address Information

Find | View All    First ◀ 1 of 1 ▶ Last

**\*Effective Date:**   + -

**Description:**       **Short Description:**

**Country:**   Japan

**Address:**

154-0004  
 Tokyo-To Setagaya-Ku  
 Taishido 4-4-1

[Edit Address](#)

**Phone:**

Social Ins Establishment Data

**Name:**

**Establishment Reference Nbr:**

**EE Pension Fund Estab Nbr:**

Social Ins Establishment page

### Social Insurance Establishment Data

- Name**      The establishment owner’s name.
- Establishment Reference Nbr (number)**      Enter the number assigned to the establishment by the social insurance agency. This number is printed on Monthly Standard Remuneration reports.
- EE Pension Fund Estab Nbr (employee pension fund establishment number)**      Enter the number assigned to this establishment by the Employees’ Pension Fund.

### See Also

Common Tax and Insurance Terms and Elements

## Defining Labor Insurance Establishments

Access the Labor Ins Estab page.

**Labor Ins Estab**

Tax/Ins Establishment: KJI000000001      Tax/Ins Establishment Type: Tax Establishment

**Address Information**      Find | View All      First ◀ 1 of 1 ▶ Last

\*Effective Date: 01/01/2001 [Calendar]      + -

Description: Carrot Soft Corp.      Short Description: [ ]

Country: JPN [Search] Japan

Address: 154-0004  
Tokyo-To Setagaya-Ku  
Taishido 4-4-1      [Edit Address](#)

Phone: 035/432-7700

**Labor Ins Establishment Data**

Industry Type: [ ]

Labor Ins Estab page

## Labor Insurance Establishment Data

**Industry Type**      Select whether this labor insurance establishment is a type A or type B industry.

### See Also

Common Tax and Insurance Terms and Elements

---

## Setting Up for Social Insurance Processing

This section lists prerequisites and discusses how to:

- View standard remuneration grades.
- Set up social insurance premium rates.

### See Also

[Chapter 9, “Managing Social Insurance ,” page 55](#)

## Prerequisites

Before setting up social insurance premium rates, you must define social insurance establishments.

See Chapter 4, “Setting Up Insurance, Taxes, and Payslips,” Setting Up Tax and Insurance Establishments , page 24.

## Pages Used to Set Up Social Insurance Data

Page Name	Object Name	Navigation	Usage
SI Standard Remun (social insurance standard remuneration)	GPJP_SC_STD_REMUN	Set Up HRMS, Product Related, Global Payroll, Social Security / Insurance, Rvw SI Std Remun Grades JPN	View the values and grades on the Monthly Standard Remuneration table, which is delivered and maintained by PeopleSoft.
SI Premium Rates (social insurance premium rates)	GPJP_SC_EST_DATA	Set Up HRMS, Product Related, Global Payroll, Social Security / Insurance, SI Premium Rates JPN	Enter the default social insurance premium rates for each social insurance establishment.

## Viewing Standard Remun Grades

Access the SI Standard Remun page.

The screenshot shows the 'SI Standard Remun' page with a sub-section titled 'Monthly Standard Remun'. The 'Effective Date' is 01/01/2001. Below this is a table titled 'Monthly Standard Remun Amounts and Grades' with columns for Lower Limit, Health Insurance Grade, Pension Insurance Grade, Monthly Std Health Remun, and Monthly Std Pension Remun. The table contains 8 rows of data.

Lower Limit	Health Insurance Grade	Pension Insurance Grade	Monthly Std Health Remun	Monthly Std Pension Remun
0	0	0	98,000	98,000
95,000	1	1	98,000	98,000
101,000	2	2	104,000	104,000
107,000	3	3	110,000	110,000
114,000	4	4	118,000	118,000
122,000	5	5	126,000	126,000
130,000	6	6	134,000	134,000
138,000	7	7	142,000	142,000

SI Standard Remun page

View the information on the Monthly Standard Remuneration table, which the system uses to determine an employee’s monthly standard remuneration amount and the grade for health insurance and pension insurance premium calculations.

## Setting Up Social Insurance Premium Rates

Access the SI Premium Rates page.



**SI Premium Rates**

**SI Establishment Number:** KJS0000001      **Carrot Soft Corp.**

**Social Insurance Premium Rates**      Find | View All      First 1 of 1 Last

\*Effective Date: 01/01/2001

Employee Contribution (Salary)			
<b>Health:</b>	<b>Nursing Care:</b>	<b>Pension:</b>	<b>Pension Fund:</b>
0.04250	0.00545	0.06925	0.01750

Employee Contribution (Bonus)			
<b>Health:</b>	<b>Nursing Care:</b>	<b>Pension:</b>	<b>Pension Fund:</b>
0.00300	0.00000	0.00500	0.00000

SI Premium Rates page

To override the default values you enter on this page, use the Variables by Category page.

### See Also

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Defining Calculation Elements,” Viewing or Updating the Values of Variables in the Same Category

## Setting Up for Inhabitant Tax Processing

Here’s how you set up for inhabitant tax processing:

1. Associate municipality codes with tax establishments and taxpayer specified numbers on the Municipality Table page.
2. Define a file handle for each municipality’s electronic file that you want to load directly into the PeopleSoft Inhabitant Tax table. Use the File Handle Table page.

You do not have to do this step if you load inhabitant tax amounts manually.

### See Also

[Chapter 4, “Setting Up Insurance, Taxes, and Payslips,” Setting Up for Inhabitant Tax Processing , page 29](#)

[Chapter 3, “Defining Country Data for Japan,” Setting Up File Handles , page 21](#)

## Pages Used to Set Up Inhabitant Tax

Page Name	Object Name	Navigation	Usage
Municipality Table	GPJP_IH_MUNIC	Set Up HRMS, Product Related, Global Payroll, Taxes, Municipality Table JPN	Define municipality codes and associate them with salary payers. For each salary payer, record the taxpayer-specified number assigned by the municipality.
File Handle Table	GPJP_FILE_HANDL	Set Up HRMS, Product Related, Global Payroll, Reports, File Handles JPN	Assign a handle to each external file that you want to import or export.

## Associating Municipality Codes with Salary Payers

Access the Municipality Table page.

The screenshot shows the 'Municipality Table' page. At the top, there is a tab labeled 'Municipality Table'. Below it, the 'Municipal Code' is 000003. The '\*Description' field contains 'Shibuya-Ku' and the 'Short Description' field contains 'Shibuya'. A 'Municipality Data' section is expanded, showing: '\*Effective Date' as 01/01/2001 with a calendar icon; '\*Salary Payer Reference Number' as JI0000000001 with a search icon; and '\*Taxpayer Specified Number' as 0001. Navigation controls like 'Find', 'View All', 'First', '1 of 1', and 'Last' are visible at the top of the data section.

Municipality Table page

**Salary Payer Reference Number** Select each salary payer reference number associated with this municipality.

**Taxpayer Specified Number** Enter the number assigned by the municipality to the salary payer for special collection.

## Setting Up Payslips

PeopleSoft Global Payroll for Japan enables you to set up payslips to accommodate variations you may need for your organization.

Here's how you set up payslips:

1. Define the data element positions on your payslip forms using the Payslip Position Listing page. PeopleSoft delivers a list of positions but does not maintain it. You can add positions if necessary.
2. Define payslip templates on the Payslip Templates page.

Specify which element to display in which position on each template.

- Assign payslip templates to pay groups and run types on the Payslip Pay Groups page.

## Pages Used to Set Up Payslips

Page Name	Object Name	Navigation	Usage
Payslip Position Listing	GPJP_PP_POSVAL	Set Up HRMS, Product Related, Global Payroll, Paylips, Template Positions JPN	View and define all possible data positions on a payslip form or template by section, row, and column.
Payslip Template	GPJP_PP_TEMPLATE	Set Up HRMS, Product Related, Global Payroll, Paylips, Templates JPN	Define templates to use in printing payslips.
Payslip Pay Group	GPJP_PP_PAYGROUP	Set Up HRMS, Product Related, Global Payroll, Paylips, Link to Pay Group JPN	Associate pay groups and run types with payslip templates.

## Defining Payslip Positions

Access the Payslip Position Listing page.

Payslip Position Listing

**Positions** Customize | Find |

First 81 Last

1-81 of

*Section	*Row	*Column	Position		
01	01	01	010101	+	-
01	01	02	010102	+	-
01	01	03	010103	+	-
01	01	04	010104	+	-
01	01	05	010105	+	-
01	01	06	010106	+	-
01	01	07	010107	+	-
01	01	08	010108	+	-
01	01	09	010109	+	-
01	02	01	010201	+	-
01	02	02	010202	+	-
01	02	03	010203	+	-
01	02	04	010204	+	-
01	02	05	010205	+	-

Payslip Position Listing page (partial)

- Section** The number of the payslip section. For example, you might have separate sections for time data, earnings, deductions, and payments.
- Row** The horizontal row of data within the section. The first row for a section is always *01*.
- Column** The vertical column of data. For each row, the columns are numbered *01* to *09*.
- Position** The concatenated section, row, and column. For example, position *010203* represents the position in the third column in the second row of the first section.

### Adding Positions

PeopleSoft delivers a list of positions. Add positions by entering two-digit numbers in the *Section*, *Row*, and *Column* fields. You must add a row of data for each position. The system completes the *Position* field after you save the page or click *Refresh*.

---

**Note.** You can delete positions, but to maintain flexibility we recommend that you do not.

---

## Defining Payslip Templates

Access the Payslip Template page.

**Payslip ID:** JSALSLIP

**\*Description:** Salary Template      **\*Short Description:** Salary Tem

**Template Definition** Find | View All 1 of 1 Last

**\*Effective Date:** 01/01/2001

*Position	Entry Type	Element Name	Heading
010101	Accumulatr	ER AC BASE PAY	BASE PAY
010102	Earnings	ER DIREC REM	DIRECTOR'S REM
010103	Earnings	ER OVERTIME	OVERTIME PAY
010104	Earnings	ER NIGHT	OVERTIME(NIGHT)

Payslip Template page

- Payslip ID** The identifier of the template you're defining.
- Short Description** If you do not enter a short description, the system enters the first 10 characters of the *Description* when you save the page.

### Template Details

- Position** Select the position of a field on your payslip form.

**Element Entry Type** Select the type of element you want to appear in the position: *Earning, Deduction, Accumulator, or Variable.*

The report displays only the last value of a variable if segmentation or slicing is encountered. Therefore, you must store any values that you want summed into an accumulator.

**Element Name** Select from the elements that are valid for the element type that you selected.

**Heading** Specify the label for this data on the payslip. If you do not enter a heading in this field, the system prints the first 10 characters of the element name in this field and on the payslip.

## Associating Payslip Templates With Pay Groups

Access the Payslip Pay Group page.

**Payslip Pay Group**

Pay Group: GD4PG1

Payslip Data Find | View All First 1 of 1 Last

\*Effective Date: 11/12/2002

Details Customize | Find First 1 of 1 Last

*Run Type	Short Description	*Payslip ID	Description
JRTSAL	Salary	JSALSLIP	Salary Template

Payslip Pay Group page

**Pay Group** The pay group that you select when you enter the page. If you want a group of payees to have their own unique payslip templates, you must define them as a unique pay group. The system cannot generate payslips for a pay group if it does not have an entry in this page.

**Run Type Name** Add a row for each run type. The system cannot generate payslips for a run type if it does not have an entry in this page.

**Payslip ID** For each run type, select the payslip template to use when printing payslips.



## CHAPTER 5

# Working With Salary and Bonus

This chapter provides an overview of base pay, overtime pay, pay cut due to absences, and bonuses. It also discusses how to:

- Set up for salary processing.
- Report earnings and deductions.
- View delivered salary and bonus elements.

---

## Understanding Salary and Bonus Rules

The delivered rules for determining salary and bonus satisfy Japanese statutory and business requirements. This section reviews some of the requirements and discusses in general terms how the rules satisfy them. Separate chapters discuss additional earnings and deductions that affect employees' take home pay.

This section discusses how to understand:

- Base pay setup.
- Overtime pay.
- Pay cuts due to absences.
- Bonuses.
- Earnings accumulators.

### Base Pay Setup

In calculating base pay, PeopleSoft Global Payroll for Japan uses the employee's compensation package that you define using compensation rate codes in PeopleSoft Human Resources. The formula ER FM BASE RATE gathers the employee's base pay rate codes, converts them to the frequency of the employee's pay type, and sums them to determine the value of the variable ER VR BASE RATE.

Base pay is calculated differently depending on the employee's pay type. If the employee's pay type is daily or hourly, the system also uses time data when calculating base pay. Enter time data each month in PeopleSoft Global Payroll Positive Input pages.

## See Also

[Chapter 3, “Defining Country Data for Japan,” Using Base Pay and other PeopleSoft Human Resources Data , page 17](#)

[Chapter 6, “Tracking Time Data ,” page 41](#)

[Chapter 3, “Defining Country Data for Japan,” Setting Up Pay Types , page 18](#)

[Chapter 5, “Working With Salary and Bonus ,” Setting Up for Salary Processing , page 37](#)

## Overtime Pay

You define the value of the variables for overtime premium amount and overtime premium ratios. The system calculates the employee’s overtime base unit and then calculates overtime pay according to the amount of overtime that you enter for the employee.

We provide variables for the following overtime premium ratios:

- Regular
- Holiday
- Late night
- Holiday late night

## See Also

[Chapter 5, “Working With Salary and Bonus ,” Setting Up for Salary Processing , page 37](#)

## Pay Cuts Due to Absences

You define the value of the variables for reduction base amounts and reduction ratios. The system calculates the employee’s reduction base unit and then calculates the pay cut based on the amount of absence time that you enter for the employee.

We provide variables for the following reduction ratios:

- Tardy arrival and early departure.
- Special leave.
- Absence.
- Sick leave.

## See Also

[Chapter 5, “Working With Salary and Bonus ,” Setting Up for Salary Processing , page 37](#)

## Bonuses

We deliver the earnings element ER BONUS. Use positive input to enter each employee’s bonus amount into this element.



**See Also**

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Working With Positive Input”

**Earnings Accumulators**

For purposes of taxation and insurance premiums, accumulators track the following amounts of each employee’s salary and bonus:

- Taxable.
- Nontaxable.
- Cash.
- Noncash.
- Remuneration subject to social insurance premium.
- Wages subject to labor insurance premium.

Additional accumulators track other details and totals of pay.

**Setting Up for Salary Processing**

You must enter some data into the system before you calculate salaries for employees whose pay types are other than *Monthly*.

1. Map compensation rate codes set up in PeopleSoft Human Resources to the PeopleSoft Japan Global Payroll rate codes.
2. Enter or update the default value of the variables for calculating overtime pay and pay cut due to absences on the Variable by Category page.

The following table lists the PeopleSoft-delivered variables and the corresponding category used to access the Variables by Category page:

Variable	Description	Category
ER VR WRK DAYS YR	Annual number of workdays	ERBS
ER VR WRK HRS DAY	Fixed working hours per day	ERBS
ER VR OVR PRM RAT	Overtime premium ratio for regular overtime	ERPR
ER VR HOL PRM RAT	Overtime premium ratio for holiday overtime	ERPR

Variable	Description	Category
ER VR NIG PRM RAT	Overtime premium ratio for late night overtime	ERPR
ER VR HOLN PRM RAT	Overtime premium ratio for holiday late night overtime	ERPR
ER VR TAED RAT	Absence reduction ratio for tardy arrival and early departure	ERRD
ER VR SPLE RAT	Absence reduction ratio for special leave	ERRD
ER VR ABS RAT	Absence reduction ratio for absence	ERRD
ER VR SCLE RAT	Absence reduction ratio for sick leave	ERRD

3. Override the default value of the variables at any level necessary on the appropriate supporting element override page.
4. Enter each employee's time data for overtime and absence through positive input.

### See Also

*PeopleSoft 8.8 Global Payroll PeopleBook*, "Defining Data Retrieval Elements," Defining Rate Codes

Chapter 3, "Defining Country Data for Japan," Setting Up Pay Types , page 18

Chapter 5, "Working With Salary and Bonus ," Base Pay Setup , page 35

*PeopleSoft 8.8 Global Payroll PeopleBook*, "Defining Calculation Elements," Viewing or Updating the Values of Variables in the Same Category

*PeopleSoft 8.8 Global Payroll PeopleBook*, "Setting Up Overrides"

*PeopleSoft 8.8 Global Payroll PeopleBook*, "Working With Positive Input"

Chapter 6, "Tracking Time Data ," page 41

---

## Reporting Earnings and Deductions

PeopleSoft Global Payroll provides a generic report that you can configure to list earnings and deductions for each employee.

**See Also**

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Setting Up and Running Generic Reports”

---

## Viewing Delivered Salary and Bonus Elements

PeopleSoft Global Payroll for Japan delivers the following earnings and process lists to calculate salaries and bonuses.

**Salary and Bonus Earnings**

Earning	Description
ER BASE PAYM	Base pay (monthly)
ER BASE PAYD	Base pay (daily)
ER BASE PAYH	Base pay (hourly)
ER OVERTIME	Regular overtime allowance
ER NIGHT	Late night working allowance
ER HOLIDAY	Holiday working allowance
ER HOL NIG	Holiday late night working allowance
ER TAED RED	Pay cut due to tardy arrival and early departure (negative earning)
ER SPLE RED	Pay cut due to special leave (negative earning)
ER ABS RED	Pay cut due to absence (negative earning)
ER SCLE RED	Pay cut due to sick leave (negative earning)

Earning	Description
ER BONUS	Bonus

### Salary and Bonus Process Lists

Process List	Description
JPRSAL	Regular salary payroll process
JPRBON	Regular bonus payroll process

---

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

---

### See Also

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Delivered Elements and System Data”

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Defining Earnings and Deduction Elements”

# CHAPTER 6

## Tracking Time Data

This chapter provides an overview of tracking time data and discusses how to:

- Prepare for entering time data.
- Enter time data.
- Report time data.
- View delivered elements for time data.

---

### Overview of Time Data Rules

The delivered rules for processing time data satisfy Japanese statutory and business requirements. This section discusses the rules for entering employee attendance, overtime, and absence data that is essential for calculating payroll. It also discusses paid time off (PTO) entitlements, takes, and balances.

### Understanding Overtime and Absence Time Variables

PeopleSoft Global Payroll for Japan delivers variables for entering various types of overtime and absence. If your organization tracks additional types of overtime or absence, you can create additional variables.

In each pay period, enter the time data for each employee prior to running payroll.

#### See Also

[Chapter 6, “Tracking Time Data,” Entering Time Data, page 42](#)

### Understanding Paid Time Off

Following is a summary of the rules regarding PTO entitlement, carryover, and take.

#### PTO Entitlement

PTO entitlement rules are as follows:

- We provide a set of variables and formulas for a schedule of entitlement. You can redefine the delivered elements and add additional variables and formulas to accommodate the entitlement schedule in your organization.
- October is the delivered value for the month when PTO is entitled. You can redefine this variable or override the value at the pay entity, pay group, or payee level.

## PTO Carryover

PTO carryover rules are as follows:

- Accumulators separately track balances of PTO entitled in the previous and current year.
- An expiration indicator variable (AO VR PTO EXP FLAG) determines whether untaken PTO in the previous year is expired when PTO carryover occurs. The delivered value is *Yes*; untaken previous year PTO is expired at the time of PTO entitlement.
  - If the value of the variable is *Yes*, then untaken PTO in the previous year is deleted (expired) and only the current year's untaken PTO is carried into the new entitlement period as previous year untaken PTO.
  - If the value of the variable is *No*, then untaken PTO in the previous year is accumulated with the current year's untaken PTO, and both are carried into the new entitlement period as previous year untaken PTO.

## PTO Take

A priority indicator variable (AO VR PR PRI FLAG) determines whether to first take the current year PTO or PTO carried over from entitlement in the previous year. The delivered value is set to take PTO entitled in the previous year first. You can redefine the delivered value or override the value at the pay entity or pay group level.

---

## Preparing to Enter Time Data

You must configure the delivered variables to conform to your organization's business rules. Then you can enter time data for each employee each pay period before running payroll.

### See Also

[Chapter 3, "Defining Country Data for Japan," Setting Up Variables for Time Tracking , page 20](#)

---

## Entering Time Data

Enter employees' time data as positive input. If you're entering data for many employees, you can speed the process by using the Positive Input by Template page.

Here's how you enter time data using templates:

1. Set up templates for entering time data on the Positive Input Template page.
  - Set up more than one template if you need more than six elements of time data.
  - Use the same templates each pay period or change them as necessary.
2. Enter time data for each employee in a pay group and calendar ID on the Positive Input by Template page.  
Associate a template with the pay group and calendar ID when you enter the page.

### See Also

*PeopleSoft 8.8 Global Payroll PeopleBook*, "Working With Positive Input"

---

## Reporting Time Data

PeopleSoft Global Payroll provides a generic report that you can configure to list time data and PTO balance for each employee.

### **See Also**

[Appendix A, “PeopleSoft Global Payroll for Japan Reports ,” Running Generic Global Payroll Reports for Japan, page 115](#)

*PeopleSoft 8.8 Global Payroll PeopleBook, “Setting Up and Running Generic Reports”*

---

## Viewing Delivered Time Data Elements

PeopleSoft delivers a query that you can run to view the names of all delivered elements designed for Japan.

### **See Also**

*PeopleSoft 8.8 Global Payroll PeopleBook, “Delivered Elements and System Data”*

*PeopleSoft 8.8 Global Payroll PeopleBook, “Defining Earnings and Deduction Elements”*





## CHAPTER 7

# Processing Terminations

This chapter provides an overview and discusses how to:

- Process terminated employees.
- Create the Withholding Tax report for terminated employees.

---

## Understanding Termination Processing

PeopleSoft delivers rules and procedures that support the automatic calculation of year-end adjustment for employees terminated by reason of death.

The generation control formula YE FM YEA ELIG determines the following:

1. Whether a payee subject to payroll calculation is terminated during the current pay period.  
This determination is based on whether the employee's Job record has the action *TER* (terminated).  
If this condition is met, the person is subject to the withholding tax report for terminated employees.
2. Whether the payee is subject to year-end adjustment calculation at the time of the last payment calculation.  
This is based on whether the employee's Job record with action *TER* also has the reason *DEA* (death).

---

**Note.** You can modify the formula YE FM YEA ELIG to add additional reason codes if you want the system to automatically calculate year-end adjustment for employees who are terminated for reasons other than death, such as international transfer.

---

When the generation control formula YE FM YEA ELIG returns the value Y, indicating that the payee qualifies for year-end adjustment calculation, the system processes the year-end adjustment calculation sections in the salary and bonus process lists. These sections are YE SE INIT, and YE SE TAX ADJ SAL.

---

## Processing Terminated Employees

This section discusses how to:

- Insert terminated Job records for terminated employees.
- Maintain the year-end data of the terminated employees.
- Process payroll.

## Inserting Termination Job Records

The termination Job record must be inserted before the payee's last payment is processed.

For example, an employee's last day is May 10 and the pay period of her last payment is from April 16 thru May 15. The payroll is processed on May 20. In this example, before her last payment is processed on May 20 you must enter her termination Job record with effective date of May 11.

### See Also

*PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce*, "Updating Workforce Information," Entering Terminations and Retirements

## Maintaining Year-End Data of Terminated Employees

Follow the standard procedures for entering tax, dependent, and deduction information for the terminated employee.

### See Also

Chapter 13, "Preparing Year End Adjustment," page 89

## Processing Payroll

You do not have to take any special action to process payroll for terminated employees. If the employee is terminated during the pay period by reason of death, the system automatically processes year-end adjustment calculations. You can modify the rules to automatically process YEA for other termination reasons, as well.

### See Also

Chapter 7, "Processing Terminations," Understanding Termination Processing , page 45

---

## Running the Withholding Tax Report for Terminated Employees

This section discusses how to:

- Run the Load YEA Report Data process for terminated employees.
- Update the Submit to Tax Agent indicator and review the summary on the YEA Report Data page.
- Print the Withholding Tax report for terminated employees.

## Pages Used to Run the Withholding Tax Report for Terminated Employees

Page Name	Object Name	Navigation	Usage
Load YEA Report Data	GPJP_RC_YEALOAD	Global Payroll, Termination Processing, Load YEA Report Data JPN	Run the process to load YEA Data for terminated employees.
YEA Report Data	GPJP_YEA_TABLE	Global Payroll, Termination Processing, Rvw/Update YEA Report Data JPN	View results of the YEA Data Load process for terminated employees. View data and update the Submit to Tax Agent indicator and Summary field.
W/H Tax Report	GPJP_RC_YEAWHRPT	Global Payroll, Termination Processing, Withholding Tax Report JPN	Print the Withholding Tax report for terminated employees. If the final payment for the employee included year-end processing (termination due to death), then the Withholding Report shows the result of year-end adjustment.

## Loading YEA Report Data for Terminated Employees

Access the Load YEA Report Data page.

Load YEA Report Data

Run Control ID: PS1 [Report Manager](#) [Process Monitor](#) Run

Language:  ▼

Process Request Parameter(s)

<b>*Salary Payer:</b>	<input type="text" value="KJI000000001"/> 🔍	Carrot Soft Corp.
<b>*Calendar Group ID:</b>	<input type="text" value="GD2JUN02"/> 🔍	Calendar Group GD2 Jun02
<b>Business Unit:</b>	<input type="text"/> 🔍	
<b>Department:</b>	<input type="text"/> 🔍	
<b>EmplID:</b>	<input type="text" value="KJ1001"/> 🔍	Asano,Bunji

Load YEA Report Data page.

**Note.** This page is similar to the Load YEA Report Data page in the Year-End Processing menu. To load YEA data for terminated employees, you must access the page through the Termination Processing menu.

**Calendar Group ID**                      Select the calendar group ID of the final salary or bonus payment.

Business Unit, Department, and EmplID are optional parameters that you can use to create YEA report data for terminated employees who belong to a specific business unit or department, or for a specific employee.

## Updating the Submit to Tax Agent Indicator and Reviewing YEA Report Data

Access the YEA Report Data page.

See [Chapter 13, “Preparing Year End Adjustment,” Viewing and Updating the YEA Data Table , page 97.](#)

## Printing the Withholding Tax Report for Terminated Employees

Access the W/H Tax Report page.

The screenshot displays the 'W/H Tax Report' interface. At the top, there is a header 'W/H Tax Report'. Below it, the 'Run Control ID' is set to 'PS1', and the 'Language' is set to 'English'. There are three buttons: 'Report Manager', 'Process Monitor', and a yellow 'Run' button. The main section is titled 'Report Request Parameter(s)' and contains several input fields with search icons:

- \*Salary Payer: KJI000000001 (Carrot Soft Corp.)
- \*Calendar Group ID: GD2JUN02 (Calendar Group GD2 Jun02)
- Employees: All Employees (dropdown menu)
- Pay Entity: (empty field)
- Business Unit: (empty field)
- Location Code: (empty field)
- Department: (empty field)
- EmplID: (empty field)

W/H Tax Report page.

**Note.** This page is similar to the W/H Tax Report page in the Year-End Processing menu. To print the Withholding Tax report for terminated employees, you must access the page through the Termination Processing menu.

**Calendar Group ID** Select the calendar group ID of the final salary or bonus payment.

**Employees** Select whether to print the report for all terminated employees or only those with Submit to Tax Agent selected on the YEA Report Data page.

Pay Entity, Business Unit, Location, Department, and EmplID are optional parameters that you can use to narrow the selection to a group of terminated employees or a specific employee.

**Note.** You must run the Load YEA Report Data process before printing this report.

## CHAPTER 8

# Managing Commuting Allowance

This chapter provides an overview of commuting allowance and discusses how to:

- Set up commuting allowance data.
- Adjust for a change in commuting allowance.
- View delivered earnings for commuting allowance.

---

## Understanding Commuting Allowance

The delivered rules for processing commuting allowance satisfy Japanese statutory and basic business process requirements. This section reviews some of the requirements and discusses in general terms how the rules satisfy them. A later section describes the individual elements of the rules.

This section discusses:

- Frequency of commuting allowance.
- Cash and noncash commuting allowance.
- Taxable and nontaxable commuting allowance.

### Frequency of Commuting Allowance

PeopleSoft Global Payroll for Japan supports payment of commuting allowance in pay cycle frequencies of one day, one month, three months, and six months.

- All components of an employee's commuting allowance must be paid on the same frequency.
- If the frequency is one day, the system calculates the monthly commuting allowance payment as the daily amount multiplied by the number of days worked.
- If the frequency is three months or six months, the actual payment is made only once for the three or six month period, but the system prorates and tracks the monthly value of cash and noncash commuting allowance for social insurance monthly remuneration calculations.

### Cash and Noncash Commuting Allowance

We provide a page on which you input the values for the following components of an employee's commuting allowance:

- Cash fare
- Cash toll

- Noncash fare
- Noncash toll

The array CM AR COMM ALLOW assigns these values to the appropriate variables.

The system uses the noncash values that you enter only for purposes of income tax and monthly remuneration calculations. The noncash amounts are not added to pay as an earning.

### **Taxable and Nontaxable Commuting Allowance**

You must track the amount of taxable and nontaxable commuting allowance for income tax calculations. The statutory nontaxable amount (limit of the tax exemption) for the total commuting allowance (fare and toll) is the same for all employees. The maximum nontaxable toll compensation varies by employee.

PeopleSoft Global Payroll for Japan separately tracks amounts for fare and toll. The system first calculates the nontaxable toll amount by applying the individual limit. It then uses that figure to derive the total amounts of taxable and nontaxable commuting allowance compensation.

When the commuting allowance pay frequency is three or six months, the system calculates the maximum nontaxable amounts for the full term and applies those limits to the commuting allowance amounts for the full term.

---

## **Entering Commuting Allowance Amounts**

Before you can process commuting allowance in the payroll run, you must input some data that establishes limits on the monthly non-taxable commuting allowance and defines the commuting allowance amounts for individual employees.

1. Update the current statutory monthly nontaxable commuting allowance on the Variables by Category page (only if the statutory limit has changed).
  - PeopleSoft delivers the default value of 100,000 yen for the variable CM VR NTAX ALW MX.
  - Select the category *CMTX* when you access the Variables by Category page.
  - Enter the new value for the variable CM VR NTAX ALW MX on the Values tab of the Variables by Category page.
2. Enter the commuting allowance and maximum nontaxable toll compensation for each employee on the Commuting Allowance page.

### **See Also**

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Defining Calculation Elements,” Viewing or Updating the Values of Variables in the Same Category

## Page Used to Enter Commuting Allowance

Page Name	Object Name	Navigation	Usage
Commuting Allowance	GPJP_CM_PYE_DATA	Global Payroll, Payee Data, Assign Earnings and Deductions, Commuting Allowance JPN	Define maximum non-taxable toll compensation and the commuting allowance amounts for each employee.

## Entering Commuting Allowance Amounts

Access the Commuting Allowance page.

The screenshot shows the 'Commuting Allowance' page for employee Hiratsu, Toshio (EmpID: J2001). The page includes a header with the employee name and ID, and a navigation bar with 'Find | View All | First | 1 of 1 | Last'. The main form area contains the following fields and sections:

- \*Effective Date:** 01/01/2001
- Pay Cycle:** 1 Month
- Maximum Non-Taxable Toll:** Monthly Amount: [input field]
- Amount and Remarks table:**

Amount	Remarks
Cash Fare: 10,000	[input field]
Non-Cash Fare: [input field]	[input field]
Cash Toll: [input field]	[input field]
Non-Cash Toll: [input field]	[input field]

Commuting Allowance page

- Pay Cycle** Select the frequency of the term of the commuting allowance for this employee: *1 Day, 1 Month, 3 Months, or 6 Months*. All components of the commuting allowance must have the same pay cycle frequency.
- Maximum Non-Taxable Toll Amount** Determine this value on an individual basis for each employee.
- Amount** Enter the amount of commuting allowance in each of the fields: *Cash Fare, Non-Cash Fare, Cash Toll, and Non-Cash Toll*.  
  
Fare refers to only the most reasonable commuting expense for the employee’s commute, which is generally the cost of public transportation. Toll applies to all commuting allowances other than fare, including commuting ticket fare, mileage, toll, and first class fare.
- Remarks** Enter a description of the commuting allowance item, such as the name of the transport facility, or the route. This is for your information only.

## Adjusting for a Change in Commuting Allowance During the Payment Term

An employee might change the commuting route after receiving a three or six month payment of the commuting allowance. If this happens, the unused portion of the commuting allowance that was paid in advance would require adjustment for the remaining months in the term.

To adjust for commuting allowance that has already been paid:

1. Calculate the amount of the adjustment and enter it into PeopleSoft Global Payroll calculations as positive input.

The total amount of the adjustment is the amount that the employee must reimburse the company for unused commuting allowance paid in advance at the rate of the previous commuting route.

We deliver three earnings items for entering positive input of the commuting allowance adjustment and its taxable and nontaxable portions.

2. Enter the employee's new commuting allowance values for the new route on the Commuting Allowance page and process normally for the reimbursed months and continuing onward.

### Example of Commuting Allowance Adjustment

In January, you pay an employee 360,000 yen for a three-month commuting pass. At the end of February, the employee moves and must reimburse the company a value of 120,000 yen for one month of the pass (March).

To process reimbursement of the advance payment for the month of March in this example, you would enter positive input of the following amounts:

Earnings Element	Description	Value in the Example
CM TAX ADJ	Taxable commuting allowance adjustment.	- 20,000 yen
CM NTAX ADJ	Nontaxable commuting allowance adjustment.	- 100,000 yen
CM ADJUST	Commuting allowance adjustment.	- 120,000 yen

Then enter the employee's new commuting allowance values for the month of March on the Commuting Allowance page and process normally.

### See Also

*PeopleSoft 8.8 Global Payroll PeopleBook*, "Working With Positive Input"



---

## Viewing Delivered Commuting Allowance Earnings

PeopleSoft Global Payroll for Japan delivers the following earnings to calculate and track commuting allowances.

Earnings Item	Description
CM TAX ALW	Taxable commuting allowance.
CM NTAX ALW	Nontaxable commuting allowance.
CM TAX ADJ	Taxable commuting allowance adjustment.
CM NTAX ADJ	Nontaxable commuting allowance adjustment.
CM ADJUST	Commuting allowance adjustment.

---

**Note.** PeopleSoft delivers a Structured Query Language (SQL) query that you can run to view the names of all delivered elements designed for Japan.

---

### See Also

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Defining Earnings and Deduction Elements”

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Delivered Elements and System Data”



## CHAPTER 9

# Managing Social Insurance

This chapter provides an overview of social insurance, describes prerequisites, and discusses how to:

- Prepare employee social insurance data.
- Prepare for social insurance reporting.
- Run social insurance reports.
- Prepare for social insurance premium payment.
- View delivered earnings and deductions for social insurance.

---

## Understanding Social Insurance Rules

PeopleSoft Global Payroll for Japan enables you to calculate, track, and report on all aspects of the statutory social insurance premium deduction from salaries and bonuses.

The delivered rules for processing Social Insurance premiums satisfy Japanese statutory and business requirements. This section reviews some of the requirements and discusses in general terms how the rules satisfy them. A later section describes the individual elements of the rules.

This section discusses how to:

- Work with Standard Remuneration calculations.
- Work with premium calculations.

## Working with Standard Remuneration Calculations

This section discusses the rules and elements that help you:

- Calculate the amount of monthly remuneration.
- Determine monthly standard remuneration and grades.
- Track eligibility for regular decision or occasional revision.
- Calculate retroactive increase or decrease in wages.

## Calculating Amount of Monthly Remuneration

The system is delivered with rules and elements that support monthly remuneration calculations. Here are some of the highlights:

- Accumulators track cash and noncash earnings that are subject to the social insurance premium and monthly fluctuation in the fixed wage portion of salary.
- Variables, formulas, and accumulators track and evaluate the base days for payment in each month for each pay type.
- Formulas calculate average monthly remuneration for appraisal months during which the employee worked sufficient base days.

## Determining Monthly Standard Remuneration and Grades

PeopleSoft delivers and maintains the Monthly Standard Remuneration table. View the values and grades in this table on the Monthly Standard Remuneration inquiry page.

## Tracking Eligibility for Regular Decision or Occasional Revision

The system uses four subject indicators to track eligibility for occasional revision or regular decision during a salary pay run:

<b>Occasional Revision</b>	The employee meets all conditions for occasional revision.
<b>Occasional Revision Candidate</b>	The employee's total amount of fixed wages has decreased or increased. Two months later the system calculates the employee's monthly standard remuneration for the previous three-month period and determines eligibility for occasional revision.
<b>Regular Decision</b>	The employee is eligible for regular decision.
<b>Not Applicable</b>	Use this value to nullify a system-entered value.

The system uses these subject indicators to determine which calculations to perform and which employees to select for reports.

## Calculating Retroactive Increase or Decrease in Wages

When an employee has a retroactive increase or decrease in wages, the system calculates the adjusted average monthly remuneration during the appraisal period if there are enough base days in the month of retroactive payment. Eligibility for occasional revision is determined based on the adjusted average monthly remuneration.

## Working with Premium Calculations

This section provides important information you should keep in mind about how the system:

- Calculates premiums.
- Deducts premiums for employees hired or terminated in the month of payment.

## Understanding Premium Calculations from Salary

The Social Insurance premiums deducted from salaries are calculated based on the values of the following data with effective date as of the end date of the month previous to the month in which payment is made:

- Employee's Monthly Standard Remuneration.
- Standard Remuneration Grade table.

- Premium rates set up for the establishment on the SI Premium Rates page.
- The employee's social insurance data entered on the Social Insurance Data page.

This means that for a payment made in May, the system uses values with effective date as of April 30 of the same year. It is important to make sure that the data effective at the end of a month is the data that you want to use for calculating payments made in the following month.

### **Understanding Premium Calculations from Bonus**

The Social Insurance premiums deducted from bonuses are calculated based on the values of premium rates set up for the establishment on the SI Premium Rates page with the effective date as of the payment date of the bonuses.

### **Understanding Premium Deductions for New Hires and Terminations**

The system checks the employee's Job record to determine whether there is a hire or termination action in the month of payment or the previous month. If there is a hire or termination action, the system calculates the appropriate deduction from salaries.

It is important to note that the termination Job record must be inserted before the payee's last payments are processed.

For example, an employee's last day is May 10 and the pay period of her last payment is from April 16 thru May 15. The payroll is processed on May 20. In this example, before her last payment is processed on May 20 you must enter her termination Job record with effective date of May 11.

### **See Also**

[Chapter 4, "Setting Up Insurance, Taxes, and Payslips," Setting Up for Social Insurance Processing , page 27](#)

[Chapter 9, "Managing Social Insurance ," Entering and Updating Employee Social Insurance Data , page 58](#)

[Chapter 7, "Processing Terminations," page 45](#)

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## **Prerequisites**

The following must be done before you can calculate social insurance premiums:

- Set up social insurance establishments.
- Set up social insurance premium rates.

### **See Also**

[Chapter 4, "Setting Up Insurance, Taxes, and Payslips," Setting Up for Social Insurance Processing , page 27](#)

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## **Preparing Employee Social Insurance Data**

This section provides an overview and discusses how to enter and update employee social insurance data.

## Overview of Preparing Employee Social Insurance Data

Enter or update an employee’s monthly remuneration amount and other social insurance personal information on the Social Insurance Data page. Manually enter this information when you initially set up the system and when you enroll a new employee. The system automatically updates the monthly remuneration amount when you run the Update SI Monthly Remun process (GPJP\_UPD\_REM). You can then manually update the data.

## Page Used to Prepare Employee Social Insurance Data

Page Name	Object Name	Navigation	Usage
Social Insurance Data	GPJP_SC_PYE_DATA	Global Payroll, Payee Data, Social Security/Insurance, Maintain Social Ins Data JPN	Enter a new enrollee’s monthly remuneration amount and other social insurance personal information. Run the Update SI Monthly Remun process (GPJP_UPD_REM) to automatically update this page. You can enter updates manually, as in the case of Regular Decision by Insurance Provider.

### See Also

Chapter 4, “Setting Up Insurance, Taxes, and Payslips,” Setting Up Tax and Insurance Establishments , page 24

## Entering and Updating Employee Social Insurance Data

Access the Social Insurance Data page.

**Social Insurance Data**

Hiratsu, Toshio Employee EmpID: J2001

**Social Insurance Data** Find | View All First 1 of 1 Last

\*Effective Date: 01/01/2001 Change Reason: Other

Amount of Monthly Remun: 105,000

SI Establishment Number: JS20000001 CarrotSoft, Setagaya

Maternity Leave:

**Health Insurance**

Health Insurance Card Number: 21

Eligibility Enrollment Date: 12/15/1981

**Nurse Care Insurance**

Special Insured:

Excluded:

**Health & Nurse Care Insurance**

Monthly Standard Remun: 104,000.000000

Standard Remun Grade: 2

Social Insurance Data page (1 of 2)

Pension Insurance							
<b>Pension Insurance Code:</b>	<input type="text" value="2000"/>						
<b>Pension Fund Number:</b>	<input type="text" value="21000000"/>						
<b>Eligibility for Voluntary Enrollment for Elderly:</b>	<input type="checkbox"/>						
<b>Base Pension Number:</b>	<input type="text"/>						
<b>Base Pension Number for Spouse:</b>	<input type="text"/>						
<table border="1"> <thead> <tr> <th colspan="2">Pension Insurance / Fund</th> </tr> </thead> <tbody> <tr> <td><b>Monthly Standard Remun:</b></td> <td>104,000.000000</td> </tr> <tr> <td><b>Standard Remun Grade:</b></td> <td>2</td> </tr> </tbody> </table>		Pension Insurance / Fund		<b>Monthly Standard Remun:</b>	104,000.000000	<b>Standard Remun Grade:</b>	2
Pension Insurance / Fund							
<b>Monthly Standard Remun:</b>	104,000.000000						
<b>Standard Remun Grade:</b>	2						
<b>Last Action:</b>	Online User						
<b>Updated on:</b>	11/08/2002						

Social Insurance Data page (2 of 2)

### Change Reason

The value selected here is used to track the Enrollment/Termination status of Social Insurance. Valid values are:

*New enrollment*

*Re-enrollment*

*Loss by Death*

*Loss by Age*

*Loss by Other Reason*

*Occasional Revision:* This value is set by the Update Social Insurance Monthly Remuneration process when the payee is subject to occasional revision.

*Regular Decision:* This value is set by the Update Social Insurance Monthly Remuneration process when the employee is subject to regular decision.

*Other*

*Excluded:* Excluded from Social Insurance premium payment.

### Amount of Monthly Remun (amount of monthly remuneration)

Average monthly remuneration over a period of the previous three months.

The system updates this value when you run the Monthly Remuneration Update process. If the employee had a retroactive pay adjustment during the calculation period, the system enters the adjusted average monthly remuneration.

The system determines the employee's monthly standard remuneration and standard remuneration grades based on this value. When you update this field, the system updates the Monthly Standard Remun and Standard Remun Grade fields for health and pension.

### SI Establishment Number (social insurance establishment number)

The system calculates the employee's premiums using the rates you defined for the establishment you select here.

**Maternity Leave** Select if the employee is on maternity leave. Social insurance premiums are not deducted for employees on maternity leave.

**Nurse Care Insurance**

**Special Insured** When you select this check box, nursing insurance is calculated and deducted, regardless of the age of the payee.

**Excluded** When you select this check box, nursing insurance is not calculated and deducted, regardless of the age of the payee.

**Pension Insurance**

**Eligibility for Voluntary Enrollment for Elderly** Select if the employee is 65 or older and qualifies for payroll deduction of Employee’s Pension Insurance contribution. Use the Pension Termination report to identify employees who are terminated from pension insurance due to age.

**Pension Basic Number and Pension Basic No for Spouse** Use these fields for your information only. The system does not currently use these values.

**Updating Last Action**

The system completes the following fields depending upon how the data is entered or updated:

Field	Manually Entered	Automatically Entered
Last Action	Online User	System
Updated on	Current date	Process run date

---

## Preparing for Social Insurance Reporting

The Monthly Remuneration Load process gathers information from PeopleSoft Human Resources and PeopleSoft Global Payroll tables and updates the Monthly Remuneration Results table (GPJP\_MTHRMN\_TBL). That table is the data source for an inquiry page and three monthly remuneration reports delivered by PeopleSoft. You can create your own Structured Query Reports (SQRs), application messages, or electronic file transfer (EFT) files that access data in the Monthly Remuneration Results table.

Here’s how you prepare for monthly remuneration reporting:

1. Finalize the salary payroll run.
2. Run the Monthly Remuneration Load Application Engine process (GPJP\_LD\_REM).
3. View and correct results of the monthly remuneration calculations on the SI Monthly Remuneration Results page.



4. Run the following monthly standard remuneration reports:
  - Monthly Standard Remuneration Revised report.
  - Monthly Standard Remuneration Regular report (for July payroll only).
  - Monthly Standard Remuneration (summary) report (for July payroll only).
5. Run the Monthly Remuneration Update Application Engine process (GPJP\_UPD\_REM).
6. Run and print the Employees Pension Insurance Eligibility Termination Report, as required.

## Pages Used to Prepare for Social Insurance Reporting

Page Name	Object Name	Navigation	Usage
Load SI Monthly Remun	GPJP_RC_SC_LOAD	Global Payroll, Social Security / Insurance, Load SI Monthly Remun JPN	Run the Load SI Monthly Remun application engine process.
SI Monthly Remun Results (social insurance monthly remuneration results)	GPJP_SC_MTH_REMUN	Global Payroll, Social Security / Insurance, Review SI Mthly Remun JPN	View and update the results of monthly remuneration calculations for individual employees. The Monthly Remuneration Load Application Engine process loads and updates this page. The parameters you enter in the process run control page determine which employees you can see on this page.
Update SI Monthly Remun	GPJP_RC_SC_LOAD	Global Payroll, Social Security / Insurance, Update SI Monthly Remun JPN	Run the Monthly Remuneration Update process to update the amount of monthly remuneration on the Social Insurance Data page for employees whose subject indicator is Occasional Revision or Regular Decision.

## Running the Monthly Remuneration Load Process

The Monthly Remuneration Load process loads the Monthly Remuneration Results table (GPJP\_MTHRMN\_TBL).

Calendar group ID is the single run control parameter. The payroll must be finalized for the calendar group ID you select; otherwise, the system issues an error message. The process uses the payment dates to determine for which month the calendar group applies. The following table lists the eligibility subject indicators for which the process loads data according to the month of the calendar group ID:

July	All Other Months
Occasional Revision	Occasional Revision
Occasional Revision Candidate	Occasional Revision Candidate
Regular Decision	

## Viewing and Editing Monthly Remuneration Calculations

Access the Review SI Monthly Remun Results page.

SI Monthly Remun Results

Hiratsu,Toshio Employee **EmplID:** J2001

Regular Decision / Occasional Revision Information Find | View All First 1 of 1 Last

**Health Insurance Card Number:** 21 **Calendar Group ID:** J200107S2  
**Calendar ID:** J200107SAL2 **Year:** 2001  
**Subject:** Regular Decision

Remun in Assessment Months

Month:	07	06	05
<b>Base Days for Payment:</b>	31	30	31
<b>Monthly Cash Remun:</b>	105,000	105,000	105,000
<b>Monthly Non-Cash Remun:</b>	0	0	0
<b>Sum of Monthly Remun:</b>	105,000	105,000	105,000

Revised Monthly Remun

<b>Total Amount:</b>	315,000	<b>Current (HIS):</b>	104,000
<b>Average:</b>	105,000	<b>Current (EPI):</b>	104,000
<b>Adjusted Average:</b>	0	<b>Revised (HIS):</b>	104,000
		<b>Revised (EPI):</b>	104,000

Remarks

**Amount of Retroactive Pay:** 0 **Remark 1:**   
**Change Amount of Fixed Salary:** 0 **Remark 2:**   
**Month of Change in Salary:**

**Last Action:** System **Updated on:** 11/11/2002

SI Monthly Remun Results page

### Subject

Indicates whether the employee is subject to occasional revision or regular decision. Values include *Occasional Revision*, *Occasional Revision Candidate*, *Regular Decision*, and *Not Applicable*.

## Remuneration in Assessment Months

View or update the amount of cash and noncash pay that is subject to social insurance premium for each month.

<b>Month</b>	The three months in the assessment period.
<b>Base Days for Payment</b>	The employee's number of work days within the pay period.
<b>Sum of Monthly Remun</b> (sum of monthly remuneration)	Sum of cash and noncash remuneration. This value is updated automatically when you change the value in the Monthly Cash Remun or Monthly Non-Cash Remun fields.

## Revised Monthly Remuneration

You must manually update the Total Amount, Average, and Revised (HIS and EPI) values in this group box. The system does not automatically recalculate the values of these fields even when you change the value in the Monthly Cash Remun or Monthly Non-Cash Remun fields. When you save the page, a warning message advises you to manually update these fields if values have changed.

<b>Total Amount</b>	Total remuneration for all three months.
<b>Average</b>	Average remuneration for the three-month period.
<b>Adjusted Average</b>	Average remuneration for the three-month period not including any retroactive amount for a month excluded from the calculation.
<b>Current (HIS)</b>	Monthly standard remuneration for health insurance before regular decision or occasional revision.
<b>Current (EPI)</b>	Monthly standard remuneration for Employees' Pension Insurance before regular decision or occasional revision.
<b>Revised (HIS)</b>	Revised monthly standard remuneration for health insurance as determined by regular decision or occasional revision.
<b>Revised (EPI)</b>	Revised monthly standard remuneration for Employees' Pension Insurance as determined by regular decision or occasional revision.

## Remarks

<b>Amount of Retroactive Pay</b>	Total amount of retroactive remuneration excluding the retroactive amount for a month excluded from the calculation due to insufficient base days. Retroactive reduction appears as a negative amount.
<b>Changed Amount of fixed Salary</b>	The monthly average of the amount entered in the Amount of Retroactive Pay field.  Retroactive reduction appears as a negative amount.
<b>Month of Change in Salary</b>	The month when retroactivity occurs. This is not the month when the salary change occurs.

The system completes the following fields depending upon how the data is entered or updated:

Field	Manually Entered	Automatically Entered
Last Action	Online User	System
Updated on	Current date	Run date of the process

### See Also

[Chapter 9, “Managing Social Insurance ,” Understanding Social Insurance Rules , page 55](#)

## Updating Employee Social Insurance Data

Run the Monthly Remuneration Update process to update the Amount of Monthly Remuneration value on the Social Insurance Data page for employees whose subject indicator is Occasional Revision or Regular Decision.

This process uses the same run control page as the Monthly Remuneration Load process.

### See Also

[Chapter 9, “Managing Social Insurance ,” Running the Monthly Remuneration Load Process , page 61](#)

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## Running Social Insurance Reports

After loading the Monthly Remuneration Results table, you can print the following reports:

- Monthly Standard Remuneration Revised report, which you submit monthly.
- Monthly Standard Remuneration Regular report, which you submit annually.
- A summary of monthly standard remuneration that you can use to complete the Monthly Standard Remuneration Summary report.
- Pension Termination report, which you use to review and update the Eligibility for Voluntary Enrollment for Elderly field on the Social Insurance Data page.

The monthly standard remuneration reports are provided in the format for the Tokyo municipality. You can modify the format as required.

---

**Note.** You must run the Monthly Remuneration Load process before running these reports. The report does not show any data if there is no employee who has the correct subject indicator for that particular report.

---

Following are more details about these reports.

## Understanding the Monthly Standard Remuneration Revised Report

Submit this report to the social insurance provider after each salary pay run in which there are employees who are subject to occasional revision. The report lists the following information for all employees whose subject indicator is Occasional Revision (fixed wages increased or decreased two months ago):

- Employee ID, health insurance establishment number, and health card number.
- Base days, cash, noncash, and sum of remuneration for each of the three months in the assessment period.
- Total of monthly remuneration, as well as current and revised standard remuneration for health insurance and pension insurance.
- Amount of retroactive pay, change amount of fixed salary, month of salary change.

## Understanding the Monthly Standard Remuneration Regular Report

Submit this report to the social insurance provider annually by the tenth of August. The report lists the following information for employees whose subject indicator is Regular Decision:

- Employee ID, health insurance establishment number, and health card number.
- Base days, cash, noncash, and sum of remuneration for May, June, and July of the current year.
- Total of monthly remuneration, as well as current and revised standard remuneration for health insurance and pension insurance.
- Amount of retroactive pay, change amount of fixed salary, and month of salary change.

## Understanding the Summary of Monthly Standard Remuneration

Use the information in this report to complete the Monthly Standard Remuneration Summary report that you submit annually to the social insurance provider with the Monthly Standard Remuneration Regular report. This report lists for each company and establishment number:

- The number of employees who became insured between July 1 and August 1.
- The number of employees submitting the Monthly Standard Remuneration Regular report.
- The number of employees subject to occasional revision in August.
- The name, employee ID, and health card number of each employee who might be subject to occasional revision in September and October.

## Understanding the Pension Termination Report

The report lists employees who became ineligible for Employees' Pension Insurance premium due to reaching the age of 65, along with their names, employee IDs, genders, positions, and whether they are eligible for voluntary enrollment. It also lists, for each establishment number and department number if you specified these parameters, the total number of employees who became ineligible and the total number eligible for voluntary enrollment.

The report determines which employees are age 65 or over as of the date you enter as the Object Date on the run control page.

## Pages Used to Run Social Insurance Reports

Page Name	Object Name	Navigation	Usage
SI Mthly Remun Rpt (Revised)	GPJP_RC_SC01	Global Payroll, Social Security / Insurance, SI Mthly Rev Remun Rpt JPN	Print the Monthly Standard Remuneration Revised Report (GPJPSC01), which lists social insurance and remuneration information for all employees whose subject indicator is Occasional Revision.
SI Mthly Remun Rpt (Regular)	GPJP_RC_SC03	Global Payroll, Social Security / Insurance, ANN – SI Mthly Reg Remun Rpt JPN	Print the Monthly Standard Remuneration Regular Report (GPJPSC02), which lists social insurance and remuneration information for all employees whose subject indicator is Regular Decision.
SI Mthly Remun Rpt (Summary)	GPJP_RC_SC03	Global Payroll, Social Security / Insurance, ANN – SI Mthly Sum Remun Rpt JPN	Print the Monthly Standard Remuneration Summary Report (GPJPSC03), which summarizes information about employees subject to regular decision and occasional revision.
SI PEN Termination Report	GPJP_RC_SC04	Global Payroll, Social Security / Insurance, SI Pension Term Report JPN	Print the Pension Termination Report (GPJPSC04), which lists employees who became ineligible for Employees' Pension Insurance premium due to reaching the age of 65.

---

## Preparing for Social Insurance Premium Payment

Use the PeopleSoft Global Payroll generic reporting functionality to prepare a report of earnings and deductions that you can use to review the amount of social insurance premium to be submitted to the insurance provider each month.

### See Also

[Appendix A, “PeopleSoft Global Payroll for Japan Reports ,” Running Generic Global Payroll Reports for Japan, page 115](#)

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Setting Up and Running Generic Reports”

## Viewing Delivered Social Insurance Earnings and Deductions

PeopleSoft Global Payroll for Japan delivers to the following deductions to calculate and track social insurance premiums.

Deduction	Description
SC HEL SAL	Health insurance premium
SC NUR SAL	Nursing insurance premium
SC PEN SAL	Employees' Pension Insurance premium
SC FND SAL	Employees' Pension Fund installment
SC HEL BON	Special Health Insurance premium
SC PEN BON	Special Employees' Pension Insurance premium

PeopleSoft Global Payroll for Japan delivers to the following earnings to track monthly remuneration.

Earnings	Description
SC REM S01	Monthly remuneration in January
SC REM S02	Monthly remuneration in February
SC REM S03	Monthly remuneration in March
SC REM S04	Monthly remuneration in April
SC REM S05	Monthly remuneration in May
SC REM S06	Monthly remuneration in June
SC REM S07	Monthly remuneration in July
SC REM S08	Monthly remuneration in August
SC REM S09	Monthly remuneration in September

Earnings	Description
SC REM S10	Monthly remuneration in October
SC REM S11	Monthly remuneration in November
SC REM S12	Monthly remuneration in December

---

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

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### See Also

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Delivered Elements and System Data”

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Defining Earnings and Deduction Elements”



# CHAPTER 10

## Managing Labor Insurance

This chapter provides an overview of labor insurance and discusses how to:

- Set up labor insurance data.
- Understand labor insurance reports.
- View delivered labor insurance deductions.

---

### Understanding Labor Insurance Rules

This section reviews some of the labor insurance requirements and discusses in general terms how the rules satisfy them. A later section discusses the individual elements of the rules.

We discuss how to:

- Calculate employment insurance premiums.
- Determine exemption for age.
- Track short time labor insured.

#### Calculating Employment Insurance Premiums

PeopleSoft delivers:

- Variables for two employment insurance industry types: Type A (general industries) and Type B (other industries).
- Bracket for determining the employment insurance rate for industry Types A and B when the total amount of wages is between 92,000 yen and 484,000 yen.
- Variables and formula for calculating the employment insurance premium when the amount of total wages falls outside the bracket.
- Separate deduction elements for salary and bonus.

#### Determining Exemption for Age

PeopleSoft delivers date elements, durations, formulas, variables, and generation control to determine whether the employee is over age 64 on April 1 and, if so, to prevent the premium deduction.

## Tracking Short Time Labor Insured

A delivered variable tracks short time workers for reporting purposes. Use this information to submit the Type Change report when an employee changes to or from short time insured worker status and to determine the contents of the Unemployment Certificate.

---

## Entering Labor Insurance Information

You must enter some data into the system before you calculate labor insurance premiums.

Here's how you set up labor insurance data:

1. Define labor insurance establishments on the Labor Ins Estab page.  
Select the industry type for each labor insurance establishment.
2. Set up employee labor insurance data on the Labor Insurance Data page.

## Page Used to Enter Labor Insurance Data

Page Name	Object Name	Navigation	Usage
Labor Insurance Data	GPJP_LA_PYE_DATA	Global Payroll, Payee Data, Social Security/Insurance, Maintain Labor Ins Data JPN	Enter labor insurance data for each employee.

### See Also

[Chapter 4, “Setting Up Insurance, Taxes, and Payslips,” Setting Up Tax and Insurance Establishments , page 24](#)

## Entering Labor Insurance Data

Access the Labor Insurance Data page.

Labor Insurance Data

Hiratsu,Toshio Employee EmpID: J2001

Labor Insurance Data

Find | View All

First ◀ 1 of 1 ▶ Last

\*Effective Date:   + -

\*Labor Insurance Establishment:   CarrotSoft, Tokyo

Workers Compensation Insurance

\*Insurance Type:

Employment Insurance

Insurance ID Number:

\*Insurance Type:

Elderly Insured:

Short Time Worker:

Labor Insurance Data page

### Workers Compensation Insurance

**Insurance Type** *Full Time Insured Worker, Insured Officer, Temporary Insured Worker, and Exclusion.*

### Employment Insurance

**Insurance Type** *Insured:* Ordinary worker who is eligible for Employment Insurance.  
*Officer:* Officers who work as employees and are eligible for Employment Insurance.  
*Exclusion:* Any other payees who are not eligible for Employment Insurance.

---

**Note.** Employees with insurance type *Officer* and *Insured* are subject to the deduction of Employment Insurance premiums unless their age is 64 or more at the time of payment. The age is determined by the system, and is not affected by the value of the Elderly Insured check box. PeopleSoft Global Payroll for Japan does not support voluntary elderly insured.

---

**Elderly Insured** Select if the payee’s Employment Insurance Type is *Officer* or *Insured* and the payee needs to be categorized as *Elderly Insured* in the Annual Basic Employment Premium report. Use the Annual Employment Insurance Exempt report to help identify employees to be categorized as elderly insured.

**Short Time Worker**

Select if the payee's Employment Insurance Type is *Officer* or *Insured* and the payee needs to be categorized as a short time worker. This check box is informational.

---

## Running Labor Insurance Reports

This section provides overviews and discusses how to run the following reports:

- Employment Insurance Premium Exempt report.
- Basic Employment Insurance Premium report.

### Understanding the Employment Insurance Exempt Report (GPJPLA01)

This report lists employees who are 64 years of age or older as of April 1 of the object year you select on the run control page. It provides their employee IDs, departments, positions, birth dates, and genders. The report also lists the total number of exempt employees in each department and establishment if you select these parameters.

If any employees listed in this report are elderly insured, select the Elderly Insured check box on the Labor Insurance Data page.

### Understanding the Basic Employment Insurance Premium Report (GPJPLA02)

This report helps you complete the Insurance Premium report that you must submit each May. All 12 payroll runs for the insurance year (April 1 to March 31) must be finalized before you run this report.

For both workers compensation insurance and employment insurance, the report lists the number of workers and wages attributed to salary and bonus, as well as the total for each insurance type (full time insured worker, insured officer, and so on). It provides the grand totals for workers compensation insurance and for employment insurance, including and excluding the elderly insured.

The report lists data for the period April 1 of the previous year to March 31 of the object year you select on the run control page.

## Pages Used to Run Labor Insurance Reports

Page Name	Object Name	Navigation	Usage
EI Exempt Report	GPJP_RC_LA01	Global Payroll, Social Security/Insurance, ANN – EI Exempt Report JPN	Lists employees who are exempt from labor insurance premium because of age.
Basic EI Premium Report	GPJP_RC_LA01	Global Payroll, Social Security/Insurance, ANN – Basic EI Premium Rpt JPN	Provides the workers compensation and employment insurance wage information you need to complete the Insurance Premium report that you must submit each May.

---

## Viewing Delivered Labor Insurance Deductions

PeopleSoft Global Payroll for Japan delivers the following deductions to process labor insurance.

Deductions	Description
LA EMP SAL	Employment insurance (salary)
LA EMP BON	Employment insurance (bonus)

---

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

---

### See Also

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Delivered Elements and System Data”

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Defining Earnings and Deduction Elements”



# CHAPTER 11

## Managing Inhabitant Tax

This chapter provides an overview of inhabitant tax, describes prerequisites, and discusses how to:

- Load and maintain the Inhabitant Tax table.
- Print the Inhabitant Tax report.
- View delivered inhabitant tax deductions elements.

---

### Understanding the Inhabitant Tax Process

PeopleSoft Global Payroll for Japan provides rules, pages, processes, and reports that you use to:

- Set up the Inhabitant Tax table, which holds municipality and recipient number data for employees as well as inhabitant tax monthly amounts.
- Prepare Wage Payment reports and summaries for municipalities.
- Load inhabitant tax amounts received from the municipalities either manually or through a data load process.
- Deduct inhabitant tax amounts from monthly salary.
- Prepare monthly inhabitant tax reports for municipalities.

#### Understanding Object Year

*Object Year* generally refers to the year for which you want to run a process or generate a report. When discussing inhabitant tax, object year is defined as follows: The municipality provides monthly inhabitant tax amounts for a period that runs from June 1 to May 31 of the following year. The object year is the year in which June 1 falls.

---

### Prerequisites

Before processing inhabitant tax, you must have performed these setup steps:

1. Associate municipality codes with tax establishments and taxpayer specified numbers on the Municipality Table page.
2. Define a file handle for each municipality's electronic file that you want to load directly into the PeopleSoft Inhabitant Tax table. Use the File Handle Table page.

You do not have to do this step if you load inhabitant tax amounts manually.

## See Also

Chapter 4, “Setting Up Insurance, Taxes, and Payslips,” Setting Up for Inhabitant Tax Processing , page 29

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## Loading and Maintaining the Inhabitant Tax Table

This section provides overviews of Inhabitant Tax Table maintenance and municipality pre-loading and discusses how to:

- Audit and correct postal code errors.
- Identify and correct missing municipality codes on the Japan Postal Code table.
- Run the Pre-Load Inhabitant Tax process.
- Update inhabitant tax data and manually enter tax amounts.
- Load inhabitant tax amounts from electronic file.

## Understanding Inhabitant Tax Table Maintenance

Here’s how you load and maintain the Inhabitant Tax table:

1. Manually update employee addresses as of January 1 of the object year.
2. Run the Municipality Audit report to check for invalid postal codes in employee addresses.
3. Manually correct errors reported by the audit report.
  - Correct all errors before you run the Pre-Load Inhabitant Tax process (GPJP\_IHMUN1).
  - Rerun the audit report until all errors are corrected.
4. Run the Blank Municipality Audit Report query to identify postal codes that do not have a municipality code in the Japan Postal Code table.
5. Add missing municipality codes to the Japan Postal Code table.
6. Run the Pre-Load Inhabitant Tax process (GPJP\_IHMUN1).

The process loads each employee’s municipality code and recipient number into the Inhabitant Tax table with the effective date of June 1 of the object year.
7. Manually correct recipient numbers for the object year on the Inhabitant Tax Data page, if necessary.
8. Send updated Wage Payment reports with summary to each municipality by the end of January of the object year.
9. Load employee inhabitant tax amounts provided by the municipality in May of the object year.
  - To load data from a printed list, manually enter tax amounts on the Inhabitant Tax Data page.
  - To load data from an electronic file, use the Load Inhabitant Tax process (GPJP\_IHMUN2).

## See Also

Chapter 13, “Preparing Year End Adjustment ,” Running Year-End Reports, page 99



## Understanding the Pre-Load Inhabitant Tax Process

The Pre-Load Inhabitant Tax process selects employees by the specified salary payer reference number. It loads their municipality code and recipient number into the Inhabitant Tax table with the effective date of June 1 of the object year. You can view and update or correct the results of this process on the Inhabitant Tax Data page.

This section discusses:

- Municipality code.
- Recipient number.
- Cautions about running the process.

### Municipality Code

The process selects the municipality code in the Postal Japan table based on the postal code in the employee's legal address record as of January 1 of the object year. If the employee does not have a legal address, it uses the postal code in the home address record.

### Recipient Number

The process loads each employee's recipient number as follows:

- Implementation year.

The process enters the employee ID as the recipient number. You must correct the recipient number manually if the recipient number is different from the employee ID.

- Subsequent years.

The process looks up the municipality code of the object year. It compares that municipality code to the employee's municipality code existing in the Inhabitant Tax record of the previous year.

- If the municipality codes do not match, the process enters the employee ID as the recipient number.
- If the municipality codes match, the process carries forward the recipient number.

### Cautions About Running the Process

Before running this process, be sure to run the Municipality Audit Report and the Blank Municipality Audit Report query and correct all postal code errors.

You can run this process only once for each salary payer reference number and object year. If you try to run it a second time, the process halts with an error message.

## Pages Used to Load and Maintain the Inhabitant Tax table

Page Name	Object Name	Navigation	Usage
Municipality Audit	GPJP_RC_IH_AUD	Global Payroll, Taxes, Municipality Audit Rpt JPN	Run the Municipality Audit report, which lists error messages for employees with invalid postal code in their legal (or home) addresses.
Query Manager	QRY_SELECT	Reporting Tools, Query, Query Manager	Run the Blank Municipality Audit Report query to identify postal codes that do not have a municipality code in the Japan Postal Code table.
Pre-load Inhabitant Tax	GPJP_RC_IH_MUN1	Global Payroll, Taxes, Pre-Load Inhabitant Tax JPN	Run the Pre-Load Inhabitant Tax process (GPJP_IHMUN1) to load the employee, municipality, and recipient numbers for the object year into the Inhabitant Tax table.
Inhabitant Tax Data	GPJP_IH_PYE_TAX	Global Payroll, Payee Data, Taxes, Maintain Inhab Tax Data JPN	View and correct recipient numbers after running the Pre-Load Inhabitant Tax process.  Enter inhabitant tax data for new hires, if necessary.  Enter one-time collection of balance for employees who terminate, if necessary.  Manually enter inhabitant tax amounts from the municipality if you do not use the electronic file load process.
Load Inhabitant Tax	GPJP_RC_IH_MUN2	Global Payroll, Taxes, Load Inhabitant Tax JPN	Run the Load Inhabitant Tax process (GPJP_IHMUN2) to load the tax amounts from the municipality if using electronic file data.

## Auditing and Correcting Postal Code Errors

Run the Municipality Audit report to find postal code errors in employee address records as of January 1 of the object year. When looking up the postal code, the process first looks to the legal address. If the employee does not have a legal address, the process looks to the home address.

The following table shows the possible error messages and the method of correction:

Error Message	Correction
Unregistered Municipality Code.	The postal code does not have an associated municipality code in the Japan Postal Code table. Update the Japan Postal Code table.
Municipality Code does not exist on Municipality Table.	If the code is valid, add it to the Municipality table.
Postal Code does not exist in the Postal Code Table.	Correct the employee’s postal code in the Personal Address table.
Unregistered Postal Code.	Postal code is missing from employee address data. Add the postal code to the employee’s data in the Personal Address table.

## Identifying and Correcting Blank Municipality Codes on the Postal Code Table

Access the Query Manager page.

1. Search for the GPJP\_AUDIT\_BLANK\_MUNIC query.
2. Run the query.
3. View the list of postal codes for which the municipality code is blank.

**Note.** Correct the missing municipality codes on the Japan Postal Code table before running the Pre-Load Inhabitant Tax process.

## Running the Pre-Load Inhabitant Tax Process

Access the Pre-Load Inhabitant Tax page.

Pre-Load Inhabitant Tax page

### Salary Payer Reference Number

The process selects all employees who are reported to the municipality for the salary payer reference number entered here.

**Object Year** The default is the current year.

**See Also**

Chapter 11, “Managing Inhabitant Tax,” Understanding the Pre-Load Inhabitant Tax Process, page 77

## Updating Inhabitant Tax Data and Manually Entering Tax Amounts

Access the Inhabitant Tax Data page.

**Inhabitant Tax Data**

Hiratsu, Toshio Employee EmpID: J2001

**Inhabitant Tax Data** Find | View All First 1 of 1 Last

\*Effective Date: 01/01/2001

\*Recipient Number: J2001

\*Municipal Code: 000003 Shibuya-ku

Tax Amount Details			Customize   Find   View All	
*Begin Date	*End Date	One-Time Tax Amount		
01/01/2001	05/31/2001	25400	+	-
06/01/2001	06/30/2001	25600	+	-

Inhabitant Tax Data page

**Effective Date** The Pre-Load Inhabitant Tax process sets this date to June 1 of the object year for employees reported to the municipality. Use June 1 of the object year for manual entry of Inhabitant Tax Data for new hires regardless of their actual dates of hire.

**Recipient Number** If the employee ID is not the correct recipient number, you can change it.

**Japanese Municipal Code** Based on the employee’s postal code as of January 1 of the object year.

**Tax Amount Details**

**One-Time Tax Amount** The amount of the employee’s inhabitant tax deduction for the salary whose payment falls between the *Begin Date* and *End Date*.

When you manually enter the tax amount for new hires, enter the first and last day of the month as the Begin Date and End Date fields respectively.

## Loading Inhabitant Tax Amounts from Electronic File

Access the Load Inhabitant Tax page.

Load Inhabitant Tax

---

Run Control ID: PS1 [Report Manager](#) [Process Monitor](#) Run

Language:  ▼

Process Request Parameter(s)

---

\*Object Year:

\*File Handle:  🔍

File Name: JFH1.txt

Load Inhabitant Tax page

- Object Year**                      The current year is the default.
- File Handle**                    Select the file handle that identifies the municipality file that you want to load to the Inhabitant Tax table.

**Note.** We provide the file layout for the Tokyo municipality as a model. You can modify the layout for other municipalities using Application Designer.

**See Also**

Chapter 3, “Defining Country Data for Japan,” Setting Up File Handles , page 21

## Printing the Inhabitant Tax Report

This section discusses how to print the Monthly Inhabitant Tax report.

### Page Used to Print the Monthly Inhabitant Tax Report

Page Name	Object Name	Navigation	Usage
Monthly Inhabitant Tax Report	GPJP_RC_IH_MNTH	Global Payroll, Taxes, Mthly Inhabitant Tax Rpt JPN	Print the Monthly Inhabitant Tax report (GPJPIH02), which provides the number of inhabitant tax collections and the total amount collected for each municipality for each pay period.

## Viewing Delivered Inhabitant Tax Deductions

PeopleSoft Global Payroll for Japan delivers the following deduction for inhabitant tax processing.

Deduction	Description
IH INH TAX	Amount of inhabitant tax

---

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

---

### **See Also**

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Delivered Elements and System Data”

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Defining Earnings and Deduction Elements”

## CHAPTER 12

# Withholding Income Tax

This chapter provides an overview of income tax withholding and discusses:

- How to set up income tax data.
- How to meet reporting requirements.
- Delivered income tax deductions.

---

## Understanding Income Tax Withholding

PeopleSoft Global Payroll for Japan provides rules to calculate and deduct estimated income tax from both salary and bonus.

### Income Tax on Salary

Rules for KOU type income tax include the following:

- Data input pages and elements to calculate the adjusted number of dependents and the dependents deduction.
- Elements to calculate net salary pay.
- Determination of tax amount by computerized calculation method or monthly income tax table lookup method as specified for each salary payer.

Rules for OTSU type income tax include the following:

- Elements to calculate net salary pay.
- Determination of tax amount by monthly income tax table lookup.

### Income Tax on Bonus

Rules for income tax on bonus accomplish the following:

- Determine whether the bonus is less than 10 times the previous month's salary.
- Calculate adjusted salary pay of the previous month if required.
- Calculate adjusted number of dependents for KOU type.
- Determine tax on bonus from the KOU type or OTSU type bonus income tax rate table.

## Prerequisite

Set up salary payer reference numbers and specify the calculation method for KOU type income tax on the Tax Establishment page.

### See Also

[Chapter 4, “Setting Up Insurance, Taxes, and Payslips,” page 23](#)

---

## Preparing for Income Tax Withholding

Enter the following data into the system before processing income tax withholding:

1. Enter income tax data for each employee on the Income Tax Data page.
2. Enter dependent data.
  - Enter dependent identification, relationship to employee, and birth date on the Dependent Data pages in PeopleSoft Human Resources.
  - Enter spouse or dependent type and disability information on the Dependent Tax Data page.

## Understanding Dependent Deductions

PeopleSoft Global Payroll for Japan recognizes three types of employees from the standpoint of withholding tax. The employee’s type is determined by what Dependent Deduction reports he or she submits to the organization.

The following table defines each employee type and discusses how to set up data on the Income Tax Data and Dependent Tax Data pages.

Employee Type	Income Tax Data Page: Income Tax Type field	Dependent Tax Page
Submit a Dependent Deduction report for <i>primary</i> salary.	Select KOU	Enter the dependent data as submitted on the Dependent Deduction report.
Submit a Dependent Deduction report for <i>secondary</i> salary.	Select OTSU	Enter the dependent data as submitted on the Dependent Deduction report.
No Dependent Deduction report Submitted.	Select OTSU	Do not enter any dependent tax information.

**Note.** The system processes dependent deductions based on the combinations defined in the above table. This means that if you select OTSU as the tax type and define dependent deductions on the Dependent Tax page, the system assumes the deductions are for a secondary salary and calculates deductions accordingly. Do not enter dependent deduction information if you did not receive a Dependent Deduction report from the payee.

---



## Pages Used to Set Up Income Tax Withholding

Page Name	Object Name	Navigation	Usage
Income Tax Data	GPJP_IT_PYE_TAX	Global Payroll , Payee Data, Taxes, Maintain Income Tax Data JPN	Enter employee tax information, such as salary payer number, employee type, and disability information.
Dependent Tax Data	GPJP_IT_DEP_TAX	Global Payroll , Payee Data, Taxes, Maintain Dep Tax Data JPN	Enter spouse or dependent type and disability information.

### See Also

Chapter 4, “Setting Up Insurance, Taxes, and Payslips,” *Setting Up Tax and Insurance Establishments* , page 24

*PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce*, “Entering Additional Data in Human Resources Records,” Tracking Dependent and Beneficiary Data

## Setting Up Employee Income Tax Data

Access the Income Tax Data page.

The screenshot displays the 'Income Tax Data' page for an employee named Asano, Bunji (EmpID: KJ1001). The page includes the following fields and values:

- Effective Date:** 11/12/2002
- Salary Payer:** (Empty field)
- Income Tax Type:** KOU
- Tax Rate:** (Empty field)
- Employee Type:** Ordinary
- Relationship to HOH:** Self
- HOH Name:** (Empty field)
- Employee Disability Type:** No Disability
- Disability Description:** (Empty field)
- Reason of Disability Change:** (Empty field)

Income Tax Data page

**Income Tax Type**                      *Designated Rate, KOU, and OTSU.*

**Tax Rate** Enter a value here only if you select *Designated Rate* for the income tax type. For example, enter .2 if the designated tax rate is 20 percent.

**Relationship to HOH** (relationship to head of household) Select the relationship of the employee to the head of the household. If the employee is the head of household, select *Self*.

**HOH Name** (head of household's name) If the employee is not the head of the household, enter the name of the person who is.

**Disability Information**

Enter or edit disability information provided by employees on the Dependent Deduction report.

**See Also**

Chapter 13, "Preparing Year End Adjustment," Entering YEA Tax and Special Deduction Data , page 92

**Setting Up Income Tax Dependent Data**

Access the Dependent Tax Data page.

The screenshot displays the 'Dependent Tax Data' page. At the top, it shows the employee's information: EmpID: J2001 and Name: Hiratsu, Toshio. Below this is a summary of the dependent: Dependent ID: 01, Name: 平津弘美, Relationship: Spouse, and Date of Birth: 01/01/1962. The main section is 'Dependent Detail Information', which contains several input fields:
 

- \*Effective Date: 01/01/2001 (with a calendar icon)
- Spouse Type: N/A (dropdown menu)
- Dependent Type: N/A (dropdown menu)
- Dependent Job: (empty text field)
- Expected Annual Income: (empty text field)
- Reason of Change: (empty text field)
- Dependent Disability Type: No Disability (dropdown menu)
- Disability Description: (empty text field)
- Reason of Disability Change: (empty text field)

 The page also features navigation controls like 'Find', 'View All', 'First', '1 of 1', and 'Last'.

Dependent Tax Data page

Most fields on this page are visible only if the dependent is a spouse.

**Disability Information**

Enter or edit disability information provided by employees on the Dependent Deduction report.

## Change of Dependent Deduction Qualification

When a dependent becomes not subject to income tax deduction because of death or other reason, insert a new row with the effective date of the dependent's change and set both the Spouse /Dependent Type and Disability Type to *N/A*.

### See Also

[Chapter 13, "Preparing Year End Adjustment," Entering YEA Tax and Special Deduction Data , page 92](#)

---

## Meeting Withholding Tax Reporting Requirements

This section provides an overview of the Withholding Tax Register and discusses how to run the report.

### Understanding the Withholding Tax Register

A PeopleSoft Application Engine process loads the results of PeopleSoft Global Payroll calculations into the Withholding Tax Register records (GPJP\_IT\_WH\_REG and GPJP\_IT\_WH\_REG2).

An SQR process selects data from the Withholding Tax Register records and from static PeopleSoft Human Resources and PeopleSoft Global Payroll records and prints the data.

Print a Withholding Tax Register report for one employee or for all employees for a specified salary payer. Run this report after year-end adjustment or at any time during the year.

---

**Note.** To include the year-end values on the Withholding Tax Register, you must run the Load YEA Table Application Engine process (GPJP\_YEALOAD) before you run this report.

---

### Page Used to Run the Withholding Tax Register Report

Page Name	Object Name	Navigation	Usage
Withholding Tax	GPJP_RC_IT_WHRG	Global Payroll, Taxes, Inc Tax Withhold Reg Rpt JPN	Run the Withholding Tax Register Report (GPJPIT01), which prints payroll data in the following categories: employee identification, salary data, bonus data, PTO data, former employment data, total amounts data, and year-end adjustment data.

---

## Viewing Delivered Income Tax Deductions

PeopleSoft Global Payroll for Japan delivers the following deductions to process income tax.

Deductions	Description
IN TAX SAL	Income tax (salary)
IN TAX BON	Income tax (bonus)

---

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

---

### **See Also**

*PeopleSoft 8.8 Global Payroll PeopleBook, “Delivered Elements and System Data”*

*PeopleSoft 8.8 Global Payroll PeopleBook, “Defining Earnings and Deduction Elements”*

## CHAPTER 13

# Preparing Year End Adjustment

This chapter provides an overview of year-end adjustment (YEA) and discusses how to:

- Collect year-end adjustment data manually and through self-service transaction.
- Print Dependent Deduction and Spouse Special Deduction reports.
- Enter YEA tax and special deduction data.
- Prepare for year-end adjustment reporting.
- Run year-end adjustment reports.
- View delivered year-end adjustment elements.

---

## Understanding Year-End Adjustment Rules and Reports

The delivered rules satisfy Japanese statutory and business requirements for year-end adjustment of the final salary or bonus payment and for independent year-end adjustment as needed.

After year-end adjustments are complete and you prepare your data tables, you can generate the following reports to complete the year-end adjustment business process:

- Withholding Tax report.
- Wage Payment report.
- Legal Payment Summary report.
- Wage Payment Summary report.

---

## Understanding Year-End Adjustment Data Collection

PeopleSoft Global Payroll for Japan supports both a paper exchange method and a self-service method of collecting year-end adjustment data from employees.

### Self-Service YEA Data Collection

If your organization licenses PeopleSoft ePay and eProfile, you can collect YEA data from employees through self-service pages. Here's how self-service YEA data is collected and reviewed:

1. The payroll administrator specifies the time period in which employees can update data through the self-service transaction.
2. Employees access a main YEA Information page in PeopleSoft ePay. From that page, they access other pages where they can review and update the following YEA data:
  - Employee tax information such as head of household and disability information.
  - Employee personal data information such as name, address, and birth date. (Available only if your organization also licenses PeopleSoft eProfile.)
  - Dependent tax information such as relationship and disability types.
  - Life insurance and personal pension insurance information.
  - Nonlife insurance, social insurance, and small enterprise mutual aid insurance information.
  - Spouse deduction information.
  - Housing loan special deduction information.
3. Payroll Administrators review the data and accept it or notify the employee to revise it.
4. (Optional) Print the Dependent Deduction report and Spouse Special Deduction report for record-keeping purposes.

### See Also

*PeopleSoft 8.8 ePay PeopleBook*, “(JPN) Updating Year-End Adjustment Data”

[Chapter 13, “Preparing Year End Adjustment,” Printing Dependent Deduction and Insurance and Spouse Deduction Reports , page 90](#)

## Manual YEA Data Collection

Payroll administrators perform the following steps to collect YEA data manually:

1. Print and distribute the following two forms on which employees manually enter their YEA data:
  - Dependent Deduction report.
  - Insurance Premium and Spouse Special Deduction report.
2. Collect the completed forms from employees.

Use these forms to enter data into PeopleSoft Global Payroll for Japan income tax and YEA tables.

Retain the completed forms for record-keeping purposes.

---

## Printing Dependent Deduction and Insurance and Spouse Deduction Reports

This section provides an overview of using the Dependent Deduction report and the Insurance Premium and Spouse Special Deduction report and discusses how to run them.

## Understanding Dependent Deduction and Insurance and Spouse Deduction Reports

The data collection method you use determines when you run these reports and what they contain.

### Manual Data Collection

Use these reports to collect the data that you later enter into the system manually:

- Dependent Deduction report.

This report prints the current employee and dependent information, which the employee can modify if there is a correction or update.

- Insurance Premium and Spouse Special Deduction report.

This report prints the basic employee information only. Employees must fill out the form and submit it as proof of the declaration of their special deduction information even when they have nothing to declare.

For record-keeping purposes, you can retain the reports submitted by employees.

### Self-Service Data Collection

With self-service data collection, you can print the reports for record-keeping purposes after employees have updated their data. The reports gather data from the tables on which the self-service data is stored in the system.

## Pages Used to Run the Dependent Deduction and Insurance and Spouse Deduction Reports

Page Name	Object Name	Navigation	Usage
YEA Dependent Deduction	GPJP_RC_YEA04	Global Payroll, Year-End Processing, Report YEA Dependent Ded JPN	Run the Dependent Deduction Report (GPJPYE04). For manual data collection, print the report and distribute it to employees for review and update. For self-service data collection, print the report for record-keeping purposes after employees have updated their data in the PeopleSoft ePay transaction.
YEA Insurance and Spouse	GPJP_RC_YEA04	Global Payroll, Year-End Processing, Report YEA Ins and Spous JPN	Run the Insurance Premium and Spouse Special Deduction report (GPJPYE05). For manual data collection, print the report and distribute it to employees for review and update. For self-service data collection, print the report for record-keeping purposes after employees have updated their data in the PeopleSoft ePay transaction.
Payee List	GPJP_RC_YEA_SEC	Click the Payee List link on the YEA Dependent Deduction or YEA Insurance and Spouse page.	Select individual employees to report. Do not use this page in conjunction with other employee selection criteria.

---

## Entering YEA Tax and Special Deduction Data

This section provides an overview of entering tax and special deduction data and discusses how to:

- Load self-service insurance, spouse, and housing special deduction data.
- Manually enter insurance, spouse, and housing special deduction data.
- Manually enter employee and dependent tax deduction information.

### Understanding Tax and Special Deduction Data Entry

You must enter special deduction information into the GPJP\_YEA\_PYEADJ table and tax deduction information into tax tables before processing year-end adjustments. Much of this data is collected through either the self-service or the manual method of YEA data collection. The method of entering the data differs according to the collection method.



The following table shows how tax deduction data is loaded into tax tables and special deduction information is loaded into the YEA adjustment data table for each method of data collection.

Data / (Payroll Table Loaded)	Self-Service Method	Manual Method
Employee tax deduction data / (GPJP_IT_PYE_TAX)	Automatically loaded when the employee saves the updated Employee Tax Information self-service page.	Collected on the Dependent Deduction report and manually entered on the Income Tax Data page (GPJP_IT_PYE_TAX).
Dependent tax deduction data / (GPJP_IT_DEP_TAX)	Automatically loaded when the employee saves the updated Edit Dependent Tax Information self-service page.	Collected on the Dependent Deduction report and manually entered on the Dependent Tax Data page (GPJP_IT_DEP_TAX).
Insurance, spouse, and housing deductions data / (GPJP_YEA_PYEADJ)	Run the Load YEA Self Service process (GPJP_YEASSLD), which loads data entered by employees on the Employee Personal Information and insurances and deductions self service pages.	Collected on the Insurance Premium and Spouse Special Deduction report and manually entered on the YEA Adj Data page (GPJP_YEA_PYEADJ).

---

**Note.** Even if you load self-service special deduction data by running the process, you must still access the YEA Adj Data page if you need to edit the employee's YEA Type. You must also access the Prior Employment page to enter prior employment information.

---

## Pages Used to Enter YEA Tax and Special Deduction Data

Page Name	Object Name	Navigation	Usage
Load YEA Self Service	GPJP_RC_YEALOAD_SS	Global Payroll, Year-End Processing, Load YEA Self Service data JPN	Payroll administrators run the Load YEA Self Service process (GPJP_YEASSLD) to load updated self-service employee personal data, life and non-life insurance, and spouse and housing loan deduction information into the YEA Adj Data table and the corresponding page (GPJP_YEA_PYEADJ).
Payee List	GPJP_RC_YEA_SEC	Click the Payee List link on the Load YEA Self Service page.	Select individual employees to load their data.
YEA Adj Data	GPJP_YEA_PYEADJ	Global Payroll , Payee Data, Taxes, Maintain Year-End Adj Data JPN	Manually enter housing acquisition deduction, insurance, spouse, and special tax reduction data. Indicate whether employees are subject to adjustment.
Prior Employment Data	GPJP_YEA_PYEPRI	Global Payroll , Payee Data, Taxes, Maintain Year-End Adj Data JPN	Enter income, tax, and social insurance premium data from prior employment with prior employer's name and address.
Income Tax Data	GPJP_IT_PYE_TAX	Global Payroll , Payee Data, Taxes, Maintain Income Tax Data JPN	Enter manually collected employee tax deduction information, such as salary payer number, employee type, and disability type.
Dependent Tax Data	GPJP_IT_DEP_TAX	Global Payroll , Payee Data, Taxes, Maintain Dep Tax Data JPN	Enter manually collected spouse or dependent deduction information, such as dependent type and disability type.

### Loading Self-Service Deduction Data

See *PeopleSoft 8.8 ePay PeopleBook*, “(JPN) Updating Year-End Adjustment Data,” Loading YEA Self-Service Deduction Data.

### Entering Special Deduction Data and Editing YEA Type

Access the YEA Adj Data page.

<b>YEA Adj Data</b>		<b>Prior Employment</b>	
Hiratsu,Toshio		Employee	
		EmpID: J2001	
<b>Year-End Adjustment Data</b> <span style="float:right">Find   View All   First ◀ 1 of 1 ▶ Last</span>			
*Effective Date:	<input type="text" value="01/01/2001"/>	+ -	
*Object Year:	<input type="text" value="2001"/>		
*YEA Type:	<input type="text" value="Subject"/>		
<b>Insurance Premium Deduction</b>			
Life Insurance Premium:	<input type="text" value="100,000.000000"/>	<b>Insurance Premium</b>	
Non-Life Insurance Premium:	<input type="text" value="13,000.000000"/>	Pension Ins Premium:	<input type="text" value="240,000.000000"/>
Social Insurance Premium:	<input type="text"/>	Long Term Non-Life Ins:	<input type="text" value="10,000.000000"/>
Mutual Aid Fund Ded:	<input type="text"/>		
<b>Spouse Deduction</b>			
Spouse Special Deduction:	<input type="text"/>	Spouse Total Income:	<input type="text"/>
<b>Housing Acquisition Spcl Ded</b>			
Housing Loan Deduction	<input type="text" value="300,000.000000"/>	Residence Start Date:	<input type="text" value="04/01/1999"/>

YEA Adj Data page

**YEA Type** (year end adjustment type) Indicates whether the employee is subject to income tax adjustment. The default is *Subject*. Select *Not Subject* if you want to exclude the employee from the YEA process.

## Entering Employee and Dependent Tax Deduction Data

On the Income Tax Data page and the Dependent Tax Data page, enter the data that you collected on the Dependent Deduction report .

### See Also

Chapter 12, “Withholding Income Tax ,” *Preparing for Income Tax Withholding* , page 84

## Preparing for Year-End Adjustment Reporting

This section provides an overview and discusses how to:

- Update municipality codes and recipient numbers.

- Load the YEA report data.
- View and update the YEA Data table.

## Understanding Year-End Adjustment Preparation

The Load YEA Table Application Engine process (GPJP\_YEALOAD) loads an intermediate table that contains most of the data necessary for the following reports: Withholding Tax, Wage Payment, Legal Payment Summary, and Withholding Tax Register.

Regardless of whether you use the self-service or manual method of collecting data, follow this sequence when preparing to report YEA data:

1. Update employee addresses if necessary.  
If you collect YEA data through self-service transaction, this step is accomplished through the Employee Personal Information page and the Load YEA Self-Service Data process.
2. Run the Pre-Load Inhabitant Tax process (GPJP\_IHMUN1) to pre-load municipality codes to the Inhabitant Tax Table.
3. Update employee recipient numbers, if necessary, on the Inhabitant Tax Data page.
4. Run the Load YEA Report Data process (GPJP\_YEALOAD).
5. Update the Submit to Tax Agent indicator and edit the summary, if necessary, on the YEA Report Data page.

## Pages Used to Prepare for YEA Reporting

Page Name	Object Name	Navigation	Usage
Pre-load Inhabitant Tax	GPJP_RC_IH_MUN1	Global Payroll, Taxes, Pre-Load Inhabitant Tax JPN	Run the Pre-Load Inhabitant Tax process (GPJP_IHMUN1), which loads the employee, municipality, and recipient numbers for the object year into the Inhabitant Tax table.
Inhabitant Tax Data	GPJP_IH_PYE_TAX	Global Payroll, Payee Data, Taxes, Maintain Inhab Tax Data JPN	View and correct recipient numbers after running the Pre-Load Inhabitant Tax process.
Load YEA Report Data	GPJP_RC_YEALOAD	Global Payroll, Year-End Processing, Load YEA Report Data JPN	Run control for the YEA data load process.
YEA Report Data	GPJP_YEA_TABLE	Global Payroll, Year-End Processing, Rvw/Update YEA Report Data JPN	View results of the YEA Data Load process. Use to view data and update the Submit to Tax Agent indicator and Summary field.

## Updating Municipality Codes and Recipient Numbers

See [Chapter 11, “Managing Inhabitant Tax ,” Loading and Maintaining the Inhabitant Tax Table , page 76.](#)

## Loading the YEA Report Data

Access the Load YEA Report Data page.

**Load YEA Report Data**

Run Control ID: PS1 [Report Manager](#) [Process Monitor](#)

Language: English

**Process Request Parameter(s)**

\*Salary Payer: KJ1000000001 Carrot Soft Corp.

\*Object Year: 2002

Business Unit:

Department:

EmplID:

Load YEA Report Data page

### EMPLID

If you select an employee ID, the process updates only the row of data for the selected employee.

---

**Note.** To load YEA data for terminated employees, use the process in the Termination Processing menu.

---

### See Also

[Chapter 7, “Processing Terminations,” page 45](#)

## Viewing and Updating the YEA Data Table

Access the YEA Report Data page.

**YEA Report Data**

Asano,Bunji
Employee
EmplID: KJ1001

**Withholding Tax Report Data**
Find | View All First 1 of 1 Last

**Object Year:**

**Recipient Number:**

**Calendar Group ID:**

**Amt of Earnings:**

**Salary after Deductions:**

**Submit to Tax Agent**

**Foreigner**

**Terminated by Death**

**Total Amt of Income Deductions:**

**Amt of Withholding Tax:**

**Dependents**

**Nbr of dependents (specified):**

**Nbr of dependents (elderly):**

**Nbr of dependents (other):**

**Nbr of disability (special):**

**Nbr of disability (other):**

**Insurance/Spouse Deductions**

**Social Ins Prem Deduction:**

**Life Insurance Premium:**

**Non-Life Insurance Premium:**

**Housing Loan Acquis Spec Ded:**

**Spouse Total Income:**

**Pension Ins Premium:**

**Long Term Non-Life Ins:**

**Summary**

YEA Report Data page

**Submit to Tax Agent**

The system selects this check box if the KOU-type employees' gross income is over 5 million yen or OTSU-type employees' gross income is over .5 million yen (formula YE FM SUBMIT). The system does not check whether the employee is an officer, is retired, or any of the other criteria for determining whether to submit the Withholding Tax report to the tax agent.

**Summary**

The system enters deductible spouse and dependent identification, prior employment data, special tax reduction data, and the beginning date of residence (for employees who receive the housing acquisition special deduction). You can edit this data.

All of a long summary may not be printed on the reports because of length limitations.

---

## Running Year-End Reports

This section discusses how to run the following reports:

- Withholding Tax Report (GPJPYE01).

*Note.* To run the report for terminated employees, use the page in the Termination Processing menu.

- Wage Payment Report (GPJPYE01).
- Legal Payment Summary Report (GPJPYE02).
- Wage Payment Summary Report (GPJPYE03).

---

**Note.** Before running these reports, run the Load YEA Report Data process (GPJP\_YEALOAD).

---

### See Also

Chapter 7, “Processing Terminations,” page 45

## Pages Used to Run Year-End Adjustment Reports

Page Name	Object Name	Navigation	Usage
W/H Tax Report	GPJP_RC_YEAWHRPT	Global Payroll, Year-End Processing, Withholding Tax Report JPN	Run the Withholding Tax Report (GPJPYE01). Deliver this report to all employees after year-end adjustment has been processed (select <i>All Employees</i> on the run control page). You also deliver this report to tax agencies for employees who fall into specific criteria (select <i>Submit to Tax Agent Employees</i> on the run control page).
Wage Payment Rpt	GPJP_RC_YEAWGRPT	Global Payroll, Year-End Processing, Wage Payment Rpt JPN	Run the Wage Payment Report (GPJPYE01). Deliver this report to municipalities after year-end adjustment has been processed and in mid-year for terminating employees. Municipal code and recipient number are optional parameters. Use these to restrict the output.
Legal Payment Rpt	GPJP_RC_YEA	Global Payroll, Year-End Processing, Legal Payment Summary Rpt JPN	Run the Legal Payment Summary Report (GPJPYE02). This report selects only those employees with Submit to Tax Agent selected on the YEA Report Data page.
Wage Pmt Summary	GPJP_RC_YEA	Global Payroll, Year-End Processing, Wage Payment Summary Rpt JPN	Run the Wage Payment Summary Report (GPJPYE03).

## Viewing Delivered Year-End Adjustment Elements

PeopleSoft Global Payroll for Japan delivers the following elements to process year-end adjustment.

### Year-End Adjustment Deductions

Deductions	Description
YE TAX DIF	Tax amount difference



## Year-End Adjustment Process Lists

Process List	Description
JPRADJSAL	Year-end adjustment on salary
JPRADJBON	Year-end adjustment on bonus
JPRADJIND	Independent year-end adjustment

---

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

---

### See Also

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Delivered Elements and System Data”

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Defining Earnings and Deduction Elements”



# CHAPTER 14

## Working with Banking in Japan

This chapter provides an overview of the banking process for Japan and discusses how to:

- Set up banking.
- Generate an Electronic Funds Transfer (EFT) file and report.

---

### Understanding the Banking Process for Japan

Following is a brief summary of the direct deposit banking process used for net payments to employees in Japan. Subsequent sections provide more details about these steps.

1. Set up bank accounts and schedule disbursements.
2. Run payroll.
3. Run the core PeopleSoft Global Payroll Banking process.
4. Run the Japan EFT process, which automatically generates the EFT file and Structured Query Report (SQR).

### Terms and Definitions

The following terms are used in discussing the banking process:

<b>Source bank</b>	The bank that pays out the funds.
<b>Transfer bank</b>	The bank that receives the funds.

For direct deposit, the source bank is the company's bank and the transfer bank is the employee's bank.

---

### Setting Up Banking

Setting up banking involves entering three categories of information on up to 11 pages. The setup involves:

- Identifying banks, branches, and accounts for your company and payees.
- Identifying source banks and defining the level of funding.
- Identifying transfer banks and disbursements.

Employees can specify percentage or amount disbursements to any number of bank accounts for each payment type (salary or bonus).

Banking setup steps are documented fully in the “Understanding Banking” chapter of the core *Global Payroll PeopleBook*. However, there are some details about following these steps that are important for banking in Japan.

### Banking Setup Details for Japan

The following table lists the details for using the banking setup pages to set up banking in Japan. These details are not covered in the core PeopleSoft Global Payroll banking setup instructions.

Page Name	Element	Instructions
Bank Table	AC Bank Name (alternate character bank name)	Enter the bank name in single-byte Katakana format.
Bank Branch Table	Branch Information group box	Specify a branch for every source bank and transfer bank that you set up. The Electronic Funds Transfer process halts with an error message when it encounters a net payment that does not have a branch associated with it.
	AC Branch Name (alternate character branch name)	Enter the branch name in single-byte Katakana format.
Source Bank Accounts	AC Account Name (alternate character account name)	Enter the bank account name in single-byte Katakana format.
	Other Required Information	Click this link to access the Japan Bank Additional Data page where you must enter the company code and account type. <i>Checking</i> is the default account type.
Bank Account Information	AC Account Name (alternate character account name)	The default value is the alternate character name entered in the AC Name field on the Personal Data page.
	Account Type	Specify either <i>Regular</i> or <i>Checking</i> . If you leave this field blank, the Electronic Funds Transfer process supplies the <i>Regular</i> value.

**Note.** All Alternate Character (AC) fields appear only if you enabled AC functionality on the Primary Permission List Preferences page.

**See Also**

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Defining Banking Instructions”

*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, “Working With Languages,” Working With Double-Byte Characters

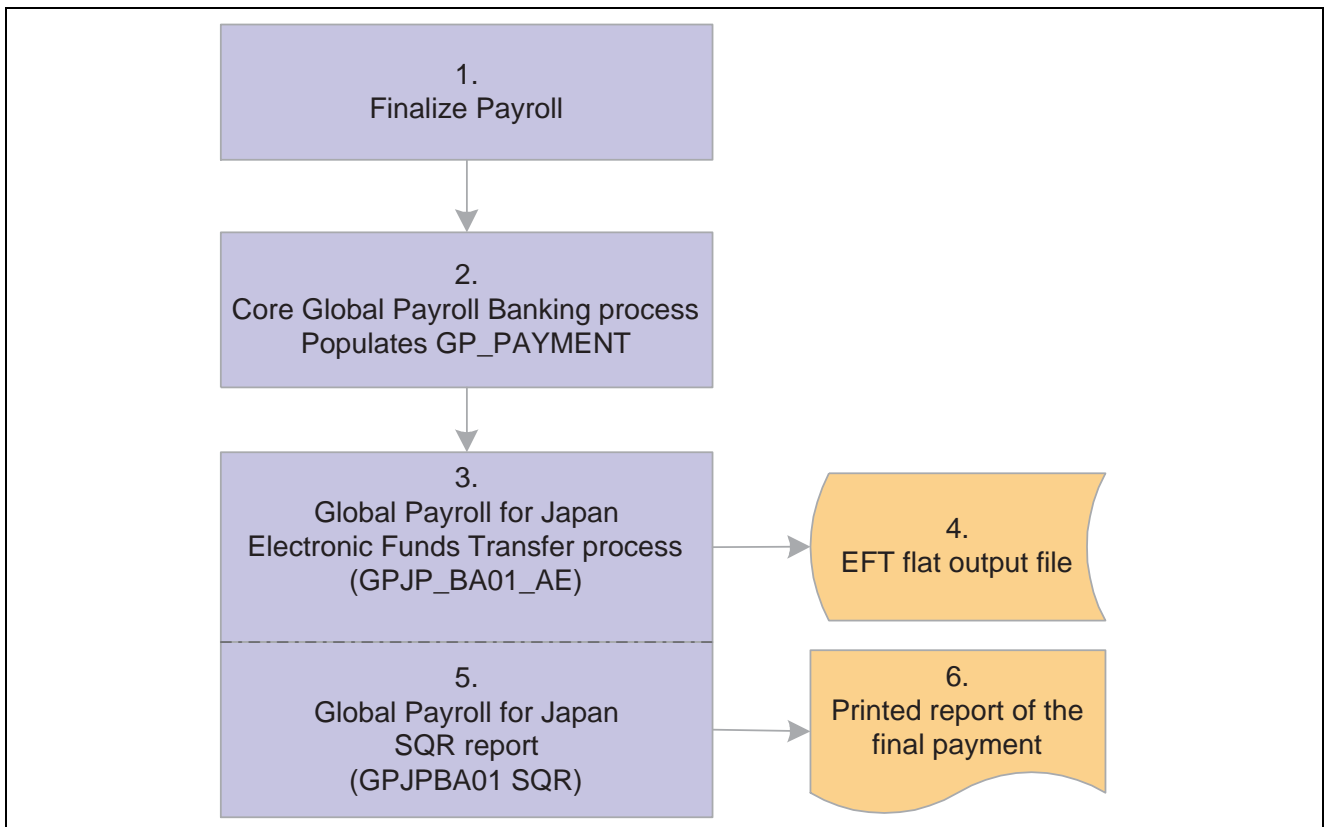
## Generating Banking EFT Files and Report

This section illustrates and discusses the steps for generating the EFT file and report. It also discusses:

- Prerequisites.
- Pages used to run the EFT process.
- How to create payment EFT.

### Understanding the Process Flow

The following diagram illustrates the payroll EFT process flow for Japan.



Payroll EFT process flow for Japan

### Understanding the Processing Steps

The steps in this section correspond to the numbers in the preceding diagram.

1. Process payroll in the PeopleSoft Global Payroll core application.
2. Run the PeopleSoft Global Payroll banking process.

This process populates the GP\_PAYMENT output record.

---

**Note.** Select the Finalize check box on the Banking Run Control page when you run the core PeopleSoft Global Payroll Banking process. If you do not, there won't be any data available for the next step.

---

3. Run the PeopleSoft Global Payroll for Japan EFT process (GPJP\_BA01\_AE).

This process selects all rows in GP\_PAYMENT that have a status of *Finalized* for the specified calendar group ID, run type name, and source bank ID.

The process populates the following records, which form the header, transaction, and trailer of both the EFT file and the printed report:

- GPJP\_BA\_HEADER: The data in this record comes from the run control parameters you enter on the EFT page. It identifies the company and the source bank account information.
- GPJP\_BA\_TRANS: The data in this record comes from GP\_PAYMENT and from the source and transfer bank data that you set up previously. It details the employee information, the transfer bank account information, and the amount of the transfer.
- GPJP\_BA\_TRAILER: This record stores totals, such as the number of records in the TRANS record and the total amount of money being transferred.

The process changes the status of rows in GP\_PAYMENT from *Finalized* to *Transferred*.

4. The EFT process consolidates the data from the three records into one EFT file that you send to the source bank.

It uses the file name and character set defined on the File Handle Table.

5. The EFT process launches the SQR program (GPJPBA01 SQR).
6. The SQR program prints the Banking report in the standard character set using data from the same three records as the EFT file.

## See Also

*PeopleSoft 8.8 Global Payroll PeopleBook*, “Defining Banking Instructions,” Understanding Banking

## Prerequisites

You must set up file handles on the File Handle Table page before you can run the EFT process. The file handle looks up the file name and character set (single-byte Katakana) that is used to generate the file.

## See Also

[Chapter 3, “Defining Country Data for Japan,” Setting Up File Handles , page 21](#)

## Pages Used to Run the EFT Process and Print the Report

Page Name	Object Name	Navigation	Usage
File Handle Table	GPJP_FILE_HANDL	Set Up HRMS, Product Related, Global Payroll, Reports, File Handles JPN	Assign a handle to each file that you want to export.
Create Payment EFT (create payment electronic funds transfer)	GPJP_RC_BA01	Global Payroll, Payment Processing, Create EFT Payment File JPN	Run the EFT process, which prepares the EFT flat file that you transmit to the appropriate bank and launches the SQR program that prints the Banking report (GPJPBA01).

### Creating Payment EFT

Access the Create Payment EFT page.

Create Payment EFT page

All of the fields on this page are required to run the process.

**Calendar Group ID** The EFT process uses the values you select in *Calendar Group ID*, *Run Type Name*, and *Source Bank ID* to extract the appropriate information from the GP\_PAYMENT table.

**File Handle** The file handle set up on the File Handle Table page that identifies the filename and character set used in this process.

**Payment Type** Valid values are *Salary* and *Bonus*. This data appears in the header of the EFT file.

**Deposit Date** This date appears in the header of the EFT file.





# CHAPTER 15

## Generating Payslips

This chapter discusses prerequisites and discusses how to generate payslips.

---

### Prerequisites

Before generating payslips you must perform the following setup:

1. Define the data element positions on your payslip forms.
2. Define payslip templates.
3. Assign payslip templates to pay groups and run types.

#### See Also

[Chapter 4, “Setting Up Insurance, Taxes, and Payslips,” Setting Up Payslips , page 30](#)

---

### Generating Payslips

This section provides an overview and discusses how to run payslips.

#### Understanding Payslip Generation

Before generating payslips, you must set up payslip templates to specify each data element in the report and its exact location on the page. The header at the top of the report always contains department ID, employee ID, employee name, report title, remarks, and company name.

Use the Payslip run control page to print any of the following:

- Regular (salary) payslip.
- Bonus payslip.
- Tax Amount Difference report (year-end adjustment payslip).

The Payslip page launches two processes in sequence:

1. The GPJP\_PP01\_AE Application Engine process gathers information and creates an intermediate table.
2. The SQR GPJPPP01 prints the payslip.

We provide a sample of a common payslip format. You might have to change the SQR to work with the specific form and printer you're using. You must modify only the SQR if you require specific formatting for payslips.

Use the parameters on the Payslip page to narrow the selection of employees within the calendar group ID selected. The system selects the appropriate payslip template for each employee by pay group for the run type of the calendar group.

---

**Note.** Each calendar group can have only one run type, which means you must set up a unique calendar group ID for each regular, bonus, or year-end tax adjustment pay run.

---

### See Also

Chapter 4, "Setting Up Insurance, Taxes, and Payslips," Setting Up Payslips , page 30

## Page Used to Run Payslips

Page Name	Object Name	Navigation	Usage
Payslip	GPJP_RC_PP01	Global Payroll, Payslips, Create/Print Payslips JPN	Run the payslip report (GPJPPP01), which prints regular (salary) payslip, bonus payslip, or Tax Amount Difference report (year-end adjustment payslip).

## Running Payslips

Access the Payslip page.

Payslip page

<b>Calendar Group ID</b>	Only finalized pay runs are available.
<b>Report Title</b>	This prints at the top of the payslip.
<b>Pay Entity</b>	If you select only this parameter, the system prints payslips for all employees in the pay entity and calendar group. To narrow the payee group further, select additional parameters.
<b>Business Unit</b>	Required field if you select a department or location.
<b>Department</b>	To print payslips for a particular department, select one that is in the business unit you specified.
<b>Location Code</b>	To print payslips for a particular location, select one that is in the business unit you specified.
<b>Payee List</b>	Click this link to access the Payee List page where you can select any number of individual employees for the payslip run. Employees must be in the calendar group selected on the Generate Payslips page.  When you return to the Generate Payslips page, the check box is selected.



## APPENDIX A

# PeopleSoft Global Payroll for Japan Reports

This appendix provides:

- A summary table of all reports.
- A list of generic report templates for Japan.

---

## PeopleSoft Global Payroll for Japan Reports: A to Z

This table lists the PeopleSoft Global Payroll for Japan reports, sorted alphanumerically by report ID.

**Note.** For more information about running the reports, refer to the corresponding chapter in this PeopleBook.

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

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Report ID and Report Name	Description	Navigation	Run Control Page
GPJPBA01 Banking Report	Generated as part of the EFT process, it prints out the information transferred to the bank by the EFT process.	Global Payroll, Payment Processing, Create EFT Payment File JPN	GPJP_RC_BA01
GPJPIH01 Municipality Audit Report	Lists error messages for employees with invalid postal code in their legal (or home) addresses.	Global Payroll, Taxes, Municipality Audit Rpt JPN	GPJP_RC_IH_AUD
GPJPIH02 Monthly Inhabitant Tax Report	Provides the number of inhabitant tax collections and the total amount collected for each municipality for each pay period.	Global Payroll, Taxes, Mthly Inhabitant Tax Rpt JPN	GPJP_RC_IH_MNTH
GPJPIT01 Withholding Tax Register	Prints payroll data in the following categories: employee identification, salary data, bonus data, PTO data, former employment data, total amounts data, and year-end adjustment data.	Global Payroll, Taxes, Inc Tax Withhold Reg Rpt JPN	GPJP_RC_IT_WHRG
GPJPLA01 Employment Insurance (EI) Exempt Report	Lists employees who are exempt from labor insurance premium because of age.	Global Payroll, Social Security/Insurance, ANN – EI Exempt Report JPN	GPJP_RC_LA01

Report ID and Report Name	Description	Navigation	Run Control Page
GPJPLA02 Basic Employment Insurance Premium Report	Provides the workers compensation and employment insurance wage information you need to complete the Insurance Premium report that you must submit each May.	Global Payroll, Social Security/Insurance, ANN – Basic EI Premium Rpt JPN	GPJP_RC_LA01
GPJPPP01 Payslip	Prints regular (salary) payslip, bonus payslip, or Tax Amount Difference report (year-end adjustment payslip).	Global Payroll, Payslips, Create/Print Payslips JPN	GPJP_RC_PP01
GPJPSC01 Monthly Standard Remuneration Revised Report	Lists social insurance and remuneration information for all employees whose subject indicator is Occasional Revision.	Global Payroll, Social Security / Insurance, SI Mthly Rev Remun Rpt JPN	GPJP_RC_SC01
GPJPSC02 Monthly Standard Remuneration Regular Report	Lists social insurance and remuneration information for all employees whose subject indicator is Regular Decision.	Global Payroll, Social Security / Insurance, ANN – SI Mthly Reg Remun Rpt JPN	GPJP_RC_SC03
GPJPSC03 Monthly Standard Remuneration Summary Report	Summarizes information about employees subject to regular decision and occasional revision.	Global Payroll, Social Security / Insurance, ANN – SI Mthly Sum Remun Rpt JPN Calculation	GPJP_RC_SC03
GPJPSC04 Pension Termination Report	Lists employees who became ineligible for Employees' Pension Insurance premium due to reaching the age of 65.	Global Payroll, Social Security / Insurance, SI Pension Term Report JPN	GPJP_RC_SC04
GPJPYE01 Withholding Tax Report	Reports income, deductions, and insurance premiums. Deliver this report to all employees after year-end adjustment has been processed and in mid-year for terminating employees. You also deliver this report to tax agencies for employees who fall into specific criteria.	<ul style="list-style-type: none"> <li>Global Payroll, Year-End Processing, Withholding Tax Report JPN</li> <li>Global Payroll, Termination Processing, Withholding Tax Report JPN</li> </ul>	GPJP_RC_YEAWHRPT
GPJPYE01 Wage Payment Report	This is the same SQR as the Withholding Tax Report, but with different parameters to select, sort, and report the data.	Global Payroll, Year-End Processing, Wage Payment Rpt JPN	GPJP_RC_YEAWGRPT
GPJPYE02 Legal Payment Summary Report	Contains information for the Legal Payment Summary report that you submit to the tax agency.	Global Payroll, Year-End Processing, Legal Payment Summary Rpt JPN	GPJP_RC_YEA

Report ID and Report Name	Description	Navigation	Run Control Page
GPJPYE03 Wage Payment Summary Report	Contains information for the Wage Payment Summary report that you submit to municipalities.	Global Payroll, Year-End Processing, Wage Payment Summary Rpt JPN	GPJP_RC_YEA
GPJPYE04 Dependent Deduction Report	For manual data collection, print the report and distribute it to employees for review and update. For self-service data collection, print the report for record-keeping purposes after employees have updated their data in the PeopleSoft ePay transaction.	Global Payroll, Year-End Processing, Report YEA Dependent Ded JPN	GPJP_RC_YEA04
GPJPYE05 Insurance Premium and Spouse Special Deduction Report	For manual data collection, print the report and distribute it to employees for review and update. For self-service data collection, print the report for record-keeping purposes after employees have updated their data in the PeopleSoft ePay transaction.	Global Payroll, Year-End Processing, Report YEA Ins and Spous JPN	GPJP_RC_YEA05

---

## Running Generic Global Payroll Reports for Japan

PeopleSoft Global Payroll provides the framework for you to define generic reports of basic payroll results.

### Generic Report Templates for Japan

We deliver the following templates specifically for payroll reporting in Japan:

- JGR01 - Earnings/Deduction List (Salary).
- JGR02 - Accumulator List (Salary).
- JGR03 - Earnings/Deduction List (Bonus).
- JGR04 - Accumulator List (Bonus).
- JGR05 - Wage Ledger.
- JGR06 - Absence and Overtime List .
- JGR07 - Withholding Tax (Terminated).

See *PeopleSoft 8.8 Global Payroll PeopleBook*, “Setting Up and Running Generic Reports”.





# Glossary of PeopleSoft Terms

<b>absence entitlement</b>	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
<b>absence take</b>	This element defines the conditions that must be met before a payee is entitled to take paid time off.
<b>account</b>	You use an account code to record and summarize financial transactions as expenditures, revenues, assets, or liabilities balances. The use of this delivered PeopleSoft ChartField is typically defined when you implement PeopleSoft General Ledger.
<b>accounting class</b>	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
<b>accounting date</b>	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
<b>accounting entry</b>	A set of related debits and credits. An accounting entry is made up of multiple accounting lines. In most PeopleSoft applications, accounting entries are always balanced (debits equal credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in the general ledger, and so forth, depending on the application.
<b>accounting split</b>	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
<b>accumulator</b>	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
<b>action reason</b>	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
<b>activity</b>	In PeopleSoft Enterprise Learning Management, an instance of a catalog item delivery method it may also be called a class. The activity defines such things as meeting times and locations, instructors, reserved equipment and materials, and detailed costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.
<b>allocation rule</b>	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure

	from the current node to the root node, checking each node for plans that contain allocation rules.
<b>alternate account</b>	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
<b>application agent</b>	An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.
<b>asset class</b>	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
<b>attachment</b>	In PeopleSoft Enterprise Learning Management, nonsystem-defined electronic material that supplements a learning resource, such as an equipment items user handbook or the site map of a large facility.
<b>background process</b>	In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.
<b>benchmark job</b>	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
<b>branch</b>	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
<b>budgetary account only</b>	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called system-maintained account.
<b>budget check</b>	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
<b>budget control</b>	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
<b>budget period</b>	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
<b>business event</b>	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
<b>catalog item</b>	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, Introduction to Microsoft Word. A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods.
<b>category</b>	In PeopleSoft Enterprise Learning Management, a way to classify catalog items so that users can easily browse and search relevant entries in the learning catalog. Categories can be hierarchical.
<b>ChartField</b>	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
<b>ChartField balancing</b>	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

<b>ChartField combination edit</b>	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
<b>ChartKey</b>	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
<b>child</b>	In PeopleSoft Tree Manager trees, a child is a node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.
<b>Class ChartField</b>	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
<b>clone</b>	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
<b>collection</b>	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.
<b>compensation object</b>	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
<b>compensation structure</b>	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
<b>configuration parameter catalog</b>	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
<b>configuration plan</b>	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
<b>content reference</b>	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
<b>context</b>	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
<b>corporate account</b>	Equivalent to the Account ChartField. Distinguishes between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (alternate) accounts required by a regulatory authority for recording and reporting financial information.
<b>cost profile</b>	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
<b>cost row</b>	A cost transaction and amount for a set of ChartFields.

<b>data acquisition</b>	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
<b>data elements</b>	Data elements, at their simplest level, define a subset of data and the rules by which to group them.  For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
<b>data row</b>	Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.
<b>data validation</b>	In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.
<b>DAT file</b>	This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.
<b>delivery method</b>	In PeopleSoft Enterprise Learning Management, identifies a learning activity's delivery method type. An activity can have one or more delivery methods.
<b>delivery method type</b>	In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.
<b>distribution</b>	The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.
<b>double byte character</b>	If you're working with Japanese or other Asian employees, you can enter the employee's name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].
<b>dynamic tree</b>	A tree that takes its detail values dynamically directly from a table in the database, rather than from a range of values entered by the user.
<b>edit table</b>	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
<b>effective date</b>	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
<b>EIM job</b>	Abbreviation for <i>Enterprise Incentive Management job</i> . In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organization's compensation-related business process. An EIM job can be stopped to allow manual changes or corrections to be applied between steps, and then resumed from where it left off, continuing with the next step. A run can also be restarted or rolled back.
<b>EIM ledger</b>	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
<b>equipment</b>	In PeopleSoft Enterprise Learning Management, resource items that can be assigned to a training facility, to a specific training room, or directly to an activity session. Equipment items are generally items that are used (sometimes for a fee) and returned after the activity is complete.

<b>event</b>	Events are predefined points either in the application processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, and OnRouteSubscription. In PeopleSoft Human Resources, <i>event</i> also refers to incidents that affect benefits eligibility.
<b>event propagation process</b>	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
<b>external system</b>	In PeopleSoft, any system that is not directly compiled with PeopleTools servers.
<b>fact</b>	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
<b>filter</b>	In PeopleSoft applications, a filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.
<b>generic process type</b>	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
<b>group</b>	Any set of records associated under a single name or variable in order to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
<b>homepage</b>	Users can personalize the homepage, or the page that first appears when they access the portal.
<b>incentive object</b>	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
<b>incentive rule</b>	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
<b>key</b>	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
<b>learner group</b>	In PeopleSoft Enterprise Learning Management, a group of learners within the same learning environment that share the same attributes, such as department or job code.
<b>learning activity</b>	See <i>activity</i> .
<b>learning history</b>	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities.
<b>learning plan</b>	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned and in-progress learning activities.
<b>ledger mapping</b>	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i> ) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

<b>level</b>	A section of a tree that organizes groups of nodes.
<b>library section</b>	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
<b>linked section</b>	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
<b>linked variable</b>	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
<b>load</b>	The feature that initiates a process to automatically load information into a PeopleSoft application for example, populating the PeopleSoft Benefits database with plan-level election information.
<b>local functionality</b>	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
<b>location</b>	Locations enable you to indicate the different types of addresses for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location indicated by a <i>1</i> is the address you use most often and may be different from the main address.
<b>market template</b>	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
<b>material</b>	In PeopleSoft Enterprise Learning Management, a resource item that can be assigned to the sessions of an activity. Material items are generally consumed during the duration of an activity and not returned, and they may have an associated cost.
<b>message definition</b>	An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.
<b>meta-SQL</b>	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
<b>metastring</b>	Metastings are special expressions included in SQL string literals. The metastings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
<b>multibook</b>	Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.
<b>multicurrency</b>	The ability to process transactions in a currency other than the business unit's base currency.
<b>objective</b>	In PeopleSoft Enterprise Learning Management, an individual's learning goal. An example of a learning goal is a competency gap.
<b>override</b>	In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.
<b>pagelet</b>	Each block of content on the homepage is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

<b>parent node</b>	A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.
<b>participant</b>	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
<b>participant object</b>	Each participant object may be related to one or more compensation objects.  See also <i>participant object</i> .
<b>payout</b>	In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.
<b>PeopleCode</b>	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
<b>PeopleCode event</b>	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
<b>PeopleSoft Internet Architecture</b>	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an RDBMS, an application server, a Web server, and a browser.
<b>performance measurement</b>	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
<b>period context</b>	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
<b>per seat cost</b>	In PeopleSoft Enterprise Learning Management, the cost per learner, based on the total activity costs divided by either minimum attendees or maximum attendees. Organizations use this cost to price PeopleSoft Enterprise Learning Management activities.
<b>plan</b>	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
<b>plan context</b>	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context. If three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
<b>plan section</b>	In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.
<b>plan template</b>	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
<b>portal registry</b>	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that

	defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
<b>private view</b>	A user-defined view that is available only to the user who created it.
<b>process</b>	See <i>Batch Processes</i> .
<b>process definition</b>	Process definitions define each run request.
<b>process instance</b>	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
<b>process job</b>	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
<b>process request</b>	A single run request, such as an SQR, a COBOL program, or a Crystal report that you run through PeopleSoft Process Scheduler.
<b>process run control</b>	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
<b>product category</b>	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
<b>publishing</b>	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
<b>record definition</b>	A logical grouping of data elements.
<b>record field</b>	A field within a record definition.
<b>record group</b>	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
<b>record input VAT flag</b>	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
<b>record output VAT flag</b>	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
<b>reference data</b>	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
<b>reference object</b>	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
<b>reference transaction</b>	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to



automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

<b>relationship object</b>	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
<b>results management process</b>	In PeopleSoft Sales Incentive Management, the process during which compensation administrators may review processing results, manually change transactions, process draws, update and review payouts, process approvals, and accumulate and push payments to the EIM ledger.
<b>role user</b>	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
<b>role</b>	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
<b>roll up</b>	In a tree, to roll up is to total sums based on the information hierarchy.
<b>routing</b>	Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takes: email message, electronic form, or worklist entry.
<b>run control</b>	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
<b>run control ID</b>	A unique ID to associate each user with his or her own run control table entries.
<b>run-level context</b>	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
<b>search query</b>	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
<b>section</b>	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
<b>security event</b>	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
<b>self-service application</b>	Self-service refers to PeopleSoft applications that are accessed by end users with a browser.
<b>session</b>	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
<b>session template</b>	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise

Learning Management activity characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

<b>setup relationship</b>	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
<b>sibling</b>	A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.
<b>single signon</b>	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
<b>source transaction</b>	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
<b>SpeedChart</b>	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
<b>SpeedType</b>	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
<b>SQR</b>	See <i>Structured Query Report (SQR)</i> .
<b>statutory account</b>	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
<b>step</b>	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
<b>Structured Query Report (SQR)</b>	A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.
<b>Summary ChartField</b>	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
<b>summary ledger</b>	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
<b>summary tree</b>	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.

<b>table</b>	The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).
<b>TableSet sharing</b>	Specifies control table data for each business unit so that redundancy is eliminated.
<b>target currency</b>	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
<b>template</b>	A template is HTML code associated with a Web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
<b>territory</b>	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
<b>TimeSpan</b>	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
<b>transaction allocation</b>	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
<b>transaction loading process</b>	In PeopleSoft Enterprise Incentive Management, the process during which transactions are loaded into Sales Incentive Management. During loading, the source currency is converted to the business unit currency while retaining the source currency code. At the completion of this stage, the transaction is in the first state.
<b>transaction state</b>	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and picked up by a different section for further processing.
<b>transaction type</b>	In PeopleSoft Enterprise Incentive Management, a way to categorize transactions to identify specific transaction types (for example, shipment, order, opportunity, and so on). Plan sections process only one type of transaction type. Transaction types can be defined based on a company's specific processes model.
<b>Translate table</b>	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
<b>tree</b>	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
<b>unclaimed transaction</b>	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
<b>uniform resource locator (URL)</b>	In PeopleSoft, the term URL refers to the entire query string. The following is an example of a URL: <code>http://serverx/InternetClient/InternetClientServlet?ICType=Script&amp;ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k</code>
<b>universal navigation header</b>	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to

providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

**URL**

See *uniform resource locator (URL)*.

**user interaction object**

In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

**variable**

In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

**warehouse**

A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

**worksheet**

A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

**workflow**

The background process that creates a list of administrative actions based on selection criteria and specifies the procedure associated with each action.

**worklist**

The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

**zero-rated VAT**

Abbreviation for *zero-rated value-added tax*. A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged.

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