

PeopleSoft®

PeopleSoft 8.8
Human Resources PeopleBook:
Administer Workforce

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Administer Workforce
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Contents

General Preface

About This PeopleBook xix

PeopleSoft Application Prerequisites.....xix

PeopleSoft Application Fundamentals.....xix

Related Documentation.....xx

 Obtaining Documentation Updates.....xx

 Ordering Printed Documentation.....xx

Typographical Conventions and Visual Cues.....xxi

 Typographical Conventions.....xxi

 Visual Cues.....xxii

Comments and Suggestions.....xxiii

Common Elements in These PeopleBooks xxiii

Preface

PeopleSoft Human Resources Administer Workforce Preface.....xxv

PeopleSoft Application Fundamentals.....xxv

PeopleBook Structure.....xxv

Chapter 1

Getting Started With PeopleSoft Human Resources Administer Workforce.....1

PeopleSoft Administer Workforce Business Processes.....1

Implementing PeopleSoft Human Resources Administer Workforce.....1

 Setting Up PeopleSoft HRMS Fundamental Tables.....2

 Setting Up Core PeopleSoft Human Resources Administer Workforce Tables.....2

 Setting Up Administer Workforce Country-Specific Tables.....3

Chapter 2

Understanding PeopleSoft Human Resources Administer Workforce.....5

PeopleSoft Human Resources Administer Workforce.....5

PeopleSoft Human Resources Administer Workforce Business Processes.....5

 Prerequisites.....6

PeopleSoft Human Resources Administer Workforce Integrations.....7

Chapter 3

Setting Up the Administer Workforce Business Process.....	9
Defining Duty Types and Reasons for Personnel Actions.....	9
Understanding Personnel Action Reasons.....	9
Pages Used to Define Duty Types and Reasons for Personnel Actions.....	10
Defining Personnel Action Reasons.....	10
(USF) Defining Award Actions.....	14
Pages Used to Define Award Actions.....	14
Defining Award Codes.....	14
Defining Employee Identification.....	15
Pages Used to Define Employee Identification.....	16
Defining Visas and Work Permits.....	16
Defining Additional Employment Data.....	17
Pages Used to Define Additional Employment Data.....	17
Creating Checklists.....	17
Pages Used to Create Checklists.....	18
Setting Up Standard Checklists.....	18

Chapter 4

Setting Up Country-Specific Tables.....	21
Understanding Country-Specific Table Setup.....	21
(FRA) Setting Up French Workforce Tables.....	21
Maintaining French Social Security Tracking Codes.....	22
Pages Used to Set Up French Workforce Tables.....	22
Defining Hours Type Codes.....	22
Entering French Occupational Illness Codes.....	23
(DEU) Setting Up German Workforce Tables	24
Understanding Social Insurance.....	24
Pages Used to Set Up German Workforce Tables.....	25
Defining Accident Insurance Codes.....	26
Entering German Nation DEUEV Codes.....	26
(NLD) Setting Up Dutch SAMEN Countries.....	28
Page Used to Set Up Dutch SAMEN Country Table.....	28
Updating the List of SAMEN Countries.....	28
(ITA) Setting Up Italian Workforce Tables.....	29
Pages Used to Set Up Italian Workforce Tables.....	29
Defining INPS Codes.....	32
Defining Seniority Notification Periods.....	33
(JPN) Setting Up Intercompany Transfer Company Data.....	33

Understanding Setup of Company Data for Intercompany Transfers.....	34
Pages Used to Set Up Intercompany Transfer Company Data.....	34
(JPN) Setting Up Japanese Supervisor Levels.....	34
Page Used to Set Up Japanese Supervisor Levels.....	36
(SGP, MYS) Setting Up Festive Advance Religions Tables for Singapore and Malaysia.....	36
Page Used to Set Up and Religions for Singapore and Malaysia.....	36
(NZL) Setting Up New Zealand Disability Codes.....	36
Page Used to Set Up New Zealand Disability Codes.....	36
(ESP) Setting Up Spanish Workforce Tables.....	36
Pages Used for Spanish Workforce Tables	38
Entering Country Codes for Social Security Reporting.....	39
Entering Insurance Company Descriptions and Address Information.....	39
Viewing Risk Codes.....	39
Defining Maximum and Minimum Social Security Ceilings.....	40
Defining Maximum and Minimum Social Security Bases by Work Group.....	41
Defining Contribution Rates and Percentages.....	43
Entering Company Information.....	45
Defining Spanish Hiring Centers.....	46
(BRA) Setting Up Establishments.....	46
Pages Used to Set Up Establishments.....	47
Enter Types of Establishment ID Codes.....	47
Setting Up Establishments.....	48
Grouping Establishments for Centralized Data.....	52

Chapter 5

Overview of the Hiring Process.....	53
Understanding the Hiring Process.....	53
Business Units and SetIDs.....	53
Hiring Versus Updating.....	53
Hiring Process User Security Considerations.....	54
Choosing a Hiring Process.....	54
Entering Data During the Hiring Process.....	55
Hiring When You Use the Manage Positions Business Process.....	56
Using PeopleSoft Workflow to Manage Hiring.....	57
Where to Find the Workflow.....	58
The Three R's of Hiring an Employee.....	59
Setting Up the Hiring Process.....	60
Prerequisites.....	60
Page Used in Setting Up the Hiring Process.....	60

Creating Employee Checklists.....	61

Chapter 6

Hiring Your Workforce.....	63
Understanding the Hiring Process.....	63
Common Elements Used in This Chapter.....	64
Assigning Employee IDs.....	64
Assigning Employment Record Numbers.....	65
(JPN) Assigning Internal Employee IDs.....	65
Hiring an Employee.....	67
Understanding the Hiring Process Pages.....	67
Pages Used to Hire an Employee.....	68
Entering Name Information.....	70
Entering Address, Phone, and Email Address Information.....	71
Entering Personal Information.....	72
Establishing Work Eligibility and Diversity.....	77
Entering Employee Job Location and Position Information.....	85
Entering Employee Job Information.....	92
Entering National Labor Agreement Data.....	101
Entering Employee Payroll Processing Data.....	106
Entering Employee Salary Plan Information.....	109
Entering Employee Compensation Information.....	110
Entering Optional Employment-Related Data.....	114
Distributing Job Earnings.....	121
Specifying Benefit Program Enrollment	124
Adding Nonemployees.....	125
Understanding the Add Nonemployee Process.....	125
Fields That Are Unique to the Add Nonemployee Process.....	126
Setting Up Nonemployee Security	128
Defining a Nonemployee Provider	129
Page Used to Define a Nonemployee Provider.....	129
Adding Job Applicants.....	129
Adding Concurrent Jobs.....	129
Setting Up Multiple Jobs	130
Working With Multiple Employment Record Numbers	130
Working With Multiple Benefit Record Numbers	131
Entering a Concurrent Job.....	132
(BRA) Running Brazil Employment Reports.....	132
Understanding the CAGED Report.....	133

Understanding Employee Registration.....	133
Pages Used to Run Brazil Employment Reports.....	133
Generating CAGED Reports.....	133
Generating Employee Registry Reports.....	134
(CAN) Running the Canadian Hire List Report.....	135
Page Used to Run the Hire List Report.....	136

Chapter 7

(USF) Hiring Employees	137
Common Elements Used in This Chapter.....	137
Using the Personnel Action Request (PAR) Process to Hire Employees.....	138
Understanding the Personnel Action Request Process to Hire Employees.....	139
Pages Used to Hire Employees.....	140
Entering Information for the Hiring Process.....	143
Defining Award Setup.....	144
Entering PAR Remarks.....	146
Entering Job Tracking Information.....	146
Entering Employee Personal Information.....	147
Entering Birth Information.....	149
Entering Address Information.....	150
Entering Veteran Information.....	151
Entering Marital Information.....	152
Entering Education Details.....	153
Entering Job Information.....	154
Specifying Benefit Programs.....	156
Entering Retirement Data.....	158
Tracking Information for Employees on Assignment.....	160
Entering Position Information.....	160
Entering Employee Compensation Information.....	162
Entering Additional Compensation Information.....	165
Viewing Pay Rate and Compensation Calculations.....	165
Viewing Job Earnings Distributions.....	168
Entering Current and Historical Employment Information	169
Entering Expiration Dates.....	171
Entering Appointment Limits.....	172
Entering Additional Employment Information.....	173
Tracking Nonpay Status Information.....	174
Entering Employee Security and Financial Disclosure Information.....	175
Entering Education Information.....	176

Assigning Employees to Positions.....	176
Hiring Employees Into Positions.....	176
Hiring Job Applicants.....	177
Adding Concurrent Jobs	177
Prerequisites.....	178
Printing Appointment Affidavits and Preliminary Employment Data Forms.....	178
Pages Used to Print the Forms.....	178

Chapter 8

Entering Additional Data in Human Resources Records	179
Understanding Additional Employee Data.....	179
Locating Personnel Records.....	180
Page Used to Locate Personnel Records.....	180
Searching for Employee Information.....	180
Searching by National ID.....	181
Setting Up and Tracking Employment Contracts.....	182
Pages Used to Set Up and Track Employment Contracts.....	183
Defining Different Types of Contracts.....	184
Setting Up Standard Contracts.....	185
Adding Basic Contract Information.....	186
Adding Special Contract Clause Information.....	189
Adding Signature Date, Responsible Party, and Probation Information.....	193
Generating the Contract Information Report.....	194
Entering Temporary Assignments.....	194
Understanding Temporary Assignments and Substantive Jobs.....	194
Pages Used to Process Temporary Assignments.....	195
Entering a Temporary Assignment.....	196
Running the Temporary Assignment Termination and Substantive Job Reactivation Process.....	196
Adding a Partial Temporary Assignment.....	197
Tracking Disabilities.....	197
Pages Used to Track Disabilities.....	198
Entering Disability Information.....	199
Documenting Disability Accommodations.....	205
(ITA) Running the ITA Disability Report.....	205
Handling Company Credit Cards.....	206
Prerequisites.....	206
Pages Used to Handle Company Credit Cards.....	207
Entering Credit Card Vendors.....	207
Assigning Cards to Employees.....	207

Handling Company Property.....	208
Pages Used to Handle Company Property.....	209
Identifying Company Property.....	209
Assigning Values to Company Property.....	210
Assigning Company Property to Employees.....	210
Tracking Dependent and Beneficiary Data.....	211
Understanding Dependent and Beneficiary Data.....	211
Pages Used to Track Dependent Identification Data.....	212
Entering Dependent/Beneficiary Name Information.....	213
Entering Dependent Address Information.....	215
Entering Dependent and Beneficiary Information.....	216
Entering Information About Court-Ordered Benefits for Dependents.....	221
(USA) Entering Federal Medicare Data.....	222
(NLD) Viewing an Employee's Dependents and Beneficiaries.....	223
Entering Dependent Citizenship and Passport Information.....	224
Entering Dependent Visa and Permit Data.....	224
Tracking Emergency Contacts.....	224
Pages Used to Track Emergency Contacts.....	225
Entering Emergency Contact Primary Address and Phone Information.....	225
Managing Citizenship and Visa/Permit Information.....	227
Common Elements Used to Manage Citizenship and Visa/Permit Information.....	227
Pages Used to Manage Citizenship and Visa/Permit Information.....	228
Tracking Employee Passport and Citizenship Information.....	228
Entering an Employee's Visa/Permit Information.....	229
Managing Driver's License Information.....	231
Page Used to Manage Driver's License Information.....	231
Entering License Numbers and Other Driving Record Information.....	231
Entering Bank Account Information.....	232
Pages Used to Enter Bank Account Information.....	232
Recording Employee Bank Account Information.....	232
(GBR) Enter an Employee's Building Society Roll Number and Name.....	235
Tracking Volunteer Activity.....	235
Page Used to Track Volunteer Activity.....	236
Entering Information on Employee Volunteer Activities.....	236
Entering and Tracking Additional Employee Data.....	237
Pages Used to Enter and Track Additional Employee Data.....	237
Recording Badge Numbers.....	237
Tracking an Employee's Business Expenses.....	238
Tracking Prior Work Experience	240
Entering Employee Images.....	241

Chapter 9

(BEL) Entering Additional Data for Belgian Workers.....	243
Tracking Claeys Formula Calculations.....	243
Pages Used to Track Claeys Formula Calculations for Belgian Workers.....	244
Entering Codes for Events and Conditions Resulting in Terminating Employment Contracts	245
Defining Reason Codes for Ending Employment Contracts.....	245
Setting Up Belgian Employment Contract Statutes for Claeys Calculations.....	246
Linking Contract Statutes to RSZ Categories.....	247
Recording Information Necessary for Terminating a Belgian Worker.....	248
Entering a Replacement Worker for the Employment Contract.....	249
Preparing For Severance Calculations.....	251
Pages Used to Prepare for Severance Calculations.....	252
Tracking Additional Seniority.....	252
Entering Protected Job Leave Information.....	254
Performing the Claeys Calculation.....	254
Pages Used to Perform the Claeys Calculation.....	255
Reviewing Claeys Calculation Variables.....	255
Calculating the Severance Amount.....	258
Running the Notifications Report.....	260
Generating DIMONA Notifications.....	260
Understanding DIMONA Notifications.....	261
Pages Used to Generate DIMONA Notifications.....	261
Creating DIMONA Notifications.....	261
Reviewing DIMONA Notifications.....	263
Running the Social Report.....	264
Page Used to Run the Social Report.....	264

Chapter 10

Managing Country-Specific Workforce Data.....	265
(CAN) Providing Additional Canadian Information.....	265
Pages Used to Provide Additional Canadian Information.....	266
Entering OEEC Workforce Survey Responses.....	267
Recording Employee Level Information About Official Language Use.....	267
(CHE) Running the Company Statistics Report.....	268
Page Used to Run the Company Statistics Report.....	268
(ESP) Generating AFI Flat Files.....	268
Understanding the AFI Process.....	269
Page Used to Generate AFI Flat Files.....	269
Creating an AFI Flat File.....	269

(FRA) Providing Additional Information for French Employees.....	271
Pages Used to Track Additional French Worker Information.....	272
Tracking Mandate Information	272
Entering Worker Military Service Information.....	272
(NLD) Recording and Reporting SAMEN Diversity Information for Dutch Workers.....	274
Understanding the SAMEN Diversity Law and SAMEN Registration.....	274
Pages Used to Record and Report SAMEN Diversity Information.....	274
Establishing a Worker's Ethnic Status.....	274
Running the NLD Law SAMEN Statistics Report.....	276
(ITA) Recording Additional Hiring Data for Italian Workers.....	276
Pages Used to Record Additional Data for Italian Workers.....	277
Running the Matricula Book Calculation Process.....	277
(ITA) Recording End of Employment Information for Italian Workers.....	278
Page Used to Record End of Employment.....	278
Recording Employee Resignation Dates and Normal Notice Periods.....	279
(ITA) Running the Equal Opportunities Report.....	279
Page Used to Run the Equal Opportunities Report.....	280
Running the Equal Opportunities Report.....	280
(USA) Determining Foreign Nationals US Residency Status.....	282
Page Used to Determine Eligibility.....	282
Running the Substantial Presence Test.....	282

Chapter 11

(JPN) Tracking Additional Appointments (Kenmu).....	285
Understanding Additional Appointments.....	285
Internal and External Companies.....	285
Setting Up Codes for Tracking Additional Appointments.....	286
Understanding Dummy Codes.....	286
Understanding Setup Steps for Additional Appointments.....	287
Prerequisites.....	288
Pages Used to Set Up Codes for Managing Additional Appointments.....	289
Setting Up a Dummy Business Unit, Company, Department, and Location.....	289
Designating Job Record Codes for Additional Appointments.....	290
Setting Up Security for Tracking Additional Appointments.....	290
Understanding Security for Additional Appointments.....	291
Pages Used to Set Up Security for Additional Appointments.....	292
Setting Up the Security Basis for Additional Appointments.....	292
Selecting Reports That Use Additional Appointment Security.....	292
Setting Up to Handle Additional Appointment Terminations.....	293

Recording and Viewing Employee Additional Appointments Data.....	294
Pages Used to Record and View Additional Appointment Information.....	294
Adding, Changing, or Releasing Additional Appointments.....	295
Recording Additional Appointment Details.....	295
Distributing Cost.....	297

Chapter 12

(JPN) Tracking Intercompany Transfers (Shukkou).....	299
Understanding the Tracking of Intercompany Transfers.....	299
Summary of Home/Host Data for Intercompany Transfers	299
Prerequisites.....	302
Setting Up Employee Data for Intercompany Transfers.....	303
Tracking Intercompany Transfers.....	303
Indicating the Home or Host Compensation Owner	304
Entering and Maintaining Home/Host Data for Intercompany Transfers.....	304
Single Company Using Single HR Database: Scenarios A1-8.....	305
Multiple Companies Using Single HR Database: Scenarios B1-6.....	309
Multiple Companies Using Single HRMS Database: Scenarios C1-6.....	313
Working With Search Page Security.....	316
Running the Intercompany Transfer Report.....	318
Page Used to Run the Intercompany Transfer Report.....	318

Chapter 13

Updating Workforce Information.....	319
Understanding How to Update Workforce Information.....	319
Using the Update Components to Change Personal and Job Data.....	320
Locating Personnel Records.....	321
Changing and Deleting Employee IDs.....	322
Pages Used to Change or Delete Employee IDs.....	322
Modifying Employee IDs.....	322
Updating Personal Data.....	323
Understanding Types of Personal Data.....	323
Using Workflow to Update Employee Addresses.....	324
Updating Emergency Contact Information.....	324
(USF) Modifying Addresses.....	325
Running Personal Data Reports.....	325
Pages Used to Run Personal Data Reports.....	326
Updating Job Data.....	326

Updating Effective-Dated Job Data.....	327
Entering Multiple Actions With the Same Effective Date.....	328
(JPN) Appointment Reporting for Job Data Changes.....	329
Security Considerations for Updating Job Data.....	330
Personnel Actions and Employee Status.....	331
Using Workflow to Maintain Job Data.....	333
Entering Promotions.....	334
Entering Departmental Transfers.....	335
Tracking Leaves of Absence.....	336
Entering Terminations and Retirements.....	338
Using Workflow to Terminate Employees.....	338
Entering Deaths.....	339
Entering Rehires.....	340
Assigning Employees to Different Positions.....	341
Running Job Data Reports.....	342
Common Elements Used in This Section.....	343
Pages Used to Run the Job Data Reports.....	343
(JPN) Running the Appointment Notification Report.....	346
(JPN) Running the Appointment List Report.....	347
(JPN) Running the Employee Assignment List Report.....	349
Entering Salary Changes.....	350
Using the Pay Rate Change Pages.....	351
Using the Job Data Component.....	351
Viewing Multiple Job Information.....	354
Page Used When Updating Information for Multiple Jobs.....	354
Viewing a Summary of All Jobs.....	354
Refreshing Tables to Facilitate Reporting.....	354
Refreshing the Employees Data Table.....	355
Refreshing the Personal Data Table.....	356
Common Elements Used to Refresh Tables to Facilitate Reporting.....	356
Pages Used to Refresh Tables to Facilitate Reporting.....	357
Running a Database Audit.....	357
Page Used to Run a Database Audit.....	357

Chapter 14

Viewing Summary Workforce Information.....	359
Viewing Employee Job History.....	359
Pages Used to View Employee Job History.....	359
Viewing an Employee's Job History.....	360

Viewing Salary Compensation Information.....	362
(USF) Viewing Employee Personal and Job Data.....	364
Pages Used to View Personal and Job Data.....	365
Viewing Employee Personal Data.....	365
Viewing Employee Job Data.....	366
Viewing Employee Benefit Programs	367
Viewing Other Summary Pages in PeopleSoft Human Resources.....	368

Chapter 15

(USF) Administering Personnel Action Requests.....	371
Understanding the Administering PAR System.....	371
Common Elements Used in This Chapter.....	372
Prerequisites.....	372
Understanding Workflow.....	373
Tracking and Routing a PAR Through Reviews and Completion.....	373
Adding and Updating Data.....	374
Processing of PAR Actions.....	378
Scheduling PAR Push.....	378
Page Used to Schedule PAR Push.....	379
Initiating and Requesting Personnel Actions.....	379
Authorizing and Approving Personnel Actions.....	379
Human Resources Processing of Personnel Actions.....	380
Canceling or Correcting a Personnel Action Request.....	380
Printing Request for Personnel Action (SF-52) and Notice of Personnel Action (SF-50) Reports.....	381
Pages Used to Print a Request for Personnel Action/Notice of Personnel Action.....	382
Printing an Action Request (SF-52).....	382
Running the Personnel Action Report.....	383
Viewing Summary Pages.....	384
Running Personnel Action History Reports.....	385
Page Used to Run the Personnel Actions History Report.....	385
Generating a Wage and Separation Report.....	385
Pages Used to Set Up and Run the ES-931 Wage and Separation Report.....	386
Entering ES-931 Identification Information.....	386
Entering ES-931 Annual Leave Information.....	387
Entering ES-931 Severance Pay Information.....	388
Generating the ES-931 Report.....	389

Chapter 16

(USF) Processing Personnel Action Requests.....	391
Understanding Personnel Action Requests.....	391
Personnel Action Requests.....	391
Sample Setup of Pages Used by Employees and Supervisors.....	392
Personnel Actions and Employee Status.....	394
Importance of Effective Dates.....	396
Multiple Actions With the Same Effective Date.....	397
Performing Common Personnel Actions.....	398
Entering Promotional Information.....	398
Requesting Departmental Reassignments.....	400
Requesting Leave of Absence.....	401
Entering Terminations and Retirement Requests.....	401
Requesting a Supplemental or Correction Individual Retirement Record.....	402
Requesting Terminations Due to Death.....	402
Requesting to Rehire an Employee.....	402
Granting Performance Awards.....	403

Chapter 17

(USF) Processing Automatic Actions for Probation, Tenure, and Within-Grade Increases.....	405
Understanding Automatic Action Processing.....	405
Prerequisites.....	405
Processing Automatic Actions.....	406
Performing Automatic Actions.....	407
Understanding the Menus and Pages Used for Each Automatic Action Process.....	407
Pages Used to Perform Automatic Actions.....	409
Processing Automatic Actions.....	409
Running the Load Within Grade Increases Process.....	409
Administering Probation Termination Automatic Actions.....	410
Running the Probation Termination Automatic Action.....	410
Administering Tenure Conversion Automatic Actions.....	411
Running the Tenure Conversion Automatic Action.....	411
Understanding Changes Made to Employee Records During Tenure Conversion.....	412
Administering Within-Grade Increases (WGIs).....	413
Understanding the 60 Day WGI Notices.....	414
Understanding the Load Within Grade Increases Process.....	414
Running the WGI Automatic Action.....	415
Entering Data That Affects WGI Automatic Actions.....	417

Chapter 18

(USF) Managing Leave.....	419
Understanding Leave Administration.....	419
Prerequisites.....	419
Automatic Leave Enrollment Administration.....	419
Leave Transfer Management.....	420
Administering Automatic Leave Enrollment.....	420
Pages Used to Administer Automatic Leave Enrollment.....	421
Setting Up the Leave Class Rules Template.....	421
Setting Up Leave Class Rule Criteria.....	423
Processing Auto Leave Enrollment.....	425
Reviewing Auto Leave Enrollment.....	426
Manually Entering or Adjusting Leave Enrollment.....	426
Setting Up Leave Transfer Programs.....	428
Pages Used to Set Up Leave Transfers.....	428
Setting Up Denial Codes and Denial Notification Letter Text	429
Setting Up Leave Transfer Programs.....	429
Setting Up Earnings Codes for Leave Transfer.....	430
Setting Up Earnings Accrual Classes for Leave Transfer.....	433
Setting Up Leave Class Rules for Leave Transfer.....	434
Administering Leave Donations.....	434
Pages Used to Administer Leave Donations.....	435
Entering Employee Requests To Contribute Leave To A Leave Bank Or Emergency Leave Transfer Program.....	435
Entering Employee Donations to Voluntary Leave Transfer Program.....	436
Entering Employee Requests To Donate To Another Agency's Leave Transfer Program.....	437
Running the Leave Bank and Transfer Process.....	438
Administering Leave Recipients.....	438
Page Used to Administer Leave Recipients.....	439
Enter Employee Requests to Receive Hours From Any of the Leave Program Types.....	439
Enrolling Recipients in the Leave Program Accrual Class.....	440
Running the Leave Bank and Transfer Process for Approved Recipients.....	440
Viewing the Data Entered by the Leave Bank and Transfer Process.....	441
Viewing Recipient Accrual Balances.....	441
Viewing Leave Transfer Data.....	441
Pages Used to View Leave Transfer Data.....	442
Viewing Leave Donations to Leave Bank and Emergency Leave Transfer Programs.....	442
Viewing Leave Donations to Voluntary Leave Transfer Programs.....	443
Viewing Donor and Recipient Accrual Summaries.....	443
Viewing Donor Contributions or Hours Received by Recipients.....	444

Viewing a Summary of Participation in a Leave Transfer Program.....444

Reporting on Leave Transfer Programs.....445

Glossary of PeopleSoft Terms.....447

Index 459

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.

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.

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.

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.

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.

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.

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

From the Documentation section of the PeopleSoft Customer Connection Website, access the PeopleSoft Press Website under the Ordering PeopleBooks topic. The PeopleSoft Press Website is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

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

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
Bold	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>O</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)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
(ISO)	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. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (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.
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.

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.

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

Common Elements in These PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	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.
Description	Enter up to 30 characters of text.
Effective Date	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.
Once, Always, and Don't Run	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.

Report Manager	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).
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	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.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	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.
Short Description	Enter up to 15 characters of text.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft Human Resources Administer Workforce Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleBook structure.

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.

PeopleSoft Application Fundamentals

The *PeopleSoft Human Resources PeopleBook: Administer Workforce* provides you with implementation and processing information for your PeopleSoft Human Resources Administer Workforce 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

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 explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements that are used in the PeopleBook. For example, if a data field is used on multiple pages, it might be defined only once in this chapter rather than repeatedly throughout the book.
Getting Started With...	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • 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.
Understanding...	This is an introductory chapter that broadly explains the product and the functionality within the product.
Setup and Implementation	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. Note. 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.

Chapters	Description
Business Process	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 be devoted to 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. Note. 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.
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 Human Resources Administer Workforce

This chapter provides an overview of the PeopleSoft Human Resources Administer Workforce business processes and discusses PeopleSoft Human Resources Administer Workforce implementation tasks

PeopleSoft Administer Workforce Business Processes

Listed below are the business processes for PeopleSoft Human Resources Administer Workforce:

- Administer hiring.
- Manage workforce data.
- Administer country-specific functionality.
- Manage country-specific workforce data.
- (USF) Administer Personnel Action Requests and automatic actions.
- (USF) Manage leave.
- Manage workforce reporting.

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

Implementing PeopleSoft Human Resources Administer Workforce

The PeopleSoft Human Resources Administer Workforce table-loading implementation includes setting up the following:

- PeopleSoft HRMS fundamental tables.
- Core PeopleSoft Human Resources Administer Workforce application tables.
- Country-specific PeopleSoft Human Resources Administer Workforce application tables.

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

Important! The order in which you set up tables required to implement PeopleSoft Human Resources Administer Workforce may vary; each individual application isn't necessarily set up in sequence. For example, you may set up HRMS tables, then tables for the PeopleSoft Human Resources Administer Workforce core application, then several tables specific to the country or industry you operate in, followed by additional PeopleSoft Human Resources Administer Workforce core tables. In addition, the order in which you set up tables may also depend on the features you want to use. 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.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Getting Started With PeopleSoft HRMS”

Setting Up PeopleSoft HRMS Fundamental Tables

The PeopleSoft Human Resources Administer Workforce business process 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 Human Resources Administer Workforce business process setup.

Step	Reference
1. Set up PeopleSoft HRMS fundamental tables.	<i>PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook</i> , “Getting Started With PeopleSoft HRMS”

Setting Up Core PeopleSoft Human Resources Administer Workforce Tables

The steps discussed in this section suggest an order in which you define the information in your core PeopleSoft Human Resources Administer Workforce tables. The information that you defined in your fundamental tables lays the foundation for this setup.

Setting up these core tables prepares your system to support these business processes:

- Administer hiring.
- Manage workforce data.
- Administer country-specific functionality.
- Manage country-specific workforce data.
- (USF) Administer Personnel Action Requests and automatic actions.
- (USF) Manage leave.
- Manage workforce reporting.

Step	Reference
1. Define basic workforce table sets.	Chapter 3, “Setting Up the Administer Workforce Business Process,” page 9
2. Define country-specific table sets.	Chapter 4, “Setting Up Country-Specific Tables,” page 21

Step	Reference
3. (Optional) Define company credit card types and credit card vendors.	Chapter 8, “Entering Additional Data in Human Resources Records,” page 179
4. Define company property.	Chapter 8, “Entering Additional Data in Human Resources Records,” page 179
5. Define drivers license types.	Chapter 8, “Entering Additional Data in Human Resources Records,” page 179
6. Define volunteer organization data.	Chapter 8, “Entering Additional Data in Human Resources Records,” page 179

Setting Up Administer Workforce Country-Specific Tables

The following table outlines country-specific core setup tables for the Administer Workforce business process. The Administer Workforce fundamental and core tables provide a foundation for the country-specific setup tables. The tables enable you to build a business process that accounts for local employment considerations.

Step	Reference
1. (CAN/USA) Define labor union bargaining unit data.	<i>PeopleSoft 8.8 Human Resources PeopleBook: Manage Labor Relations</i> , “Setting Up Labor Relations Data”
2. (FRA) Define CPAM ID codes.	Chapter 4, “Setting Up Country-Specific Tables,” (FRA) Setting Up French Workforce Tables, page 21
3. (FRA) Define CRAM codes.	Chapter 4, “Setting Up Country-Specific Tables,” (FRA) Setting Up French Workforce Tables, page 21
4. (FRA) Define hours type codes.	Chapter 4, “Setting Up Country-Specific Tables,” (FRA) Setting Up French Workforce Tables, page 21
5. (FRA) Define occupational illness codes.	Chapter 4, “Setting Up Country-Specific Tables,” (FRA) Setting Up French Workforce Tables, page 21
6. (DEU) Define German labor relations and works council codes.	<i>PeopleSoft 8.8 Human Resources PeopleBook: Manage Labor Relations</i> , “Setting Up Labor Relations Data,” (DEU) Setting Up German Works Councils Business Process
7. (DEU) Define German accident insurance codes and provider information.	Chapter 4, “Setting Up Country-Specific Tables,” (DEU) Setting Up German Workforce Tables, page 24
8. (DEU) Add or update Bundesanstalt fur Arbeit job codes as delivered by PeopleSoft.	Chapter 4, “Setting Up Country-Specific Tables,” (DEU) Setting Up German Workforce Tables, page 24
9. (DEU) Add or maintain job codes for conducting statistical analysis of your workforce in Germany.	Chapter 4, “Setting Up Country-Specific Tables,” (DEU) Setting Up German Workforce Tables, page 24
10. (DEU) Add or update nation DEUEV information.	Chapter 4, “Setting Up Country-Specific Tables,” (DEU) Setting Up German Workforce Tables, page 24
11. (NLD) Update the current list of SAMEN countries.	Chapter 4, “Setting Up Country-Specific Tables,” (NLD) Setting Up Dutch SAMEN Countries, page 28
12. (ITA) Setup action reasons for job turnover actions.	Chapter 4, “Setting Up Country-Specific Tables,” (ITA) Setting Up Italian Workforce Tables, page 29

Step	Reference
13. (ITA) Define production units based on your company's agreements with the unions.	Chapter 4, "Setting Up Country-Specific Tables," (ITA) Setting Up Italian Workforce Tables, page 29
14. (JPN) Define supervisor level data.	Chapter 4, "Setting Up Country-Specific Tables," (JPN) Setting Up Japanese Supervisor Levels, page 34
15. (AUS, NZL, SGP, MYS) Define religions and festive advance types.	Chapter 4, "Setting Up Country-Specific Tables," (SGP, MYS) Setting Up Festive Advance Religions Tables for Singapore and Malaysia, page 36
16. (NZL) Define disability codes.	Chapter 4, "Setting Up Country-Specific Tables," (NZL) Setting Up New Zealand Disability Codes, page 36
17. (ESP) Review or define maximum and minimum social security ceilings and the minimum hourly rate for each social security scheme.	Chapter 4, "Setting Up Country-Specific Tables," (ESP) Setting Up Spanish Workforce Tables, page 36
18. (ESP) View and update maximum and minimum bases by work group and the minimum hourly rate used to calculate the social security base for part-time employees.	Chapter 4, "Setting Up Country-Specific Tables," (ESP) Setting Up Spanish Workforce Tables, page 36
19. (ESP) View and define the rates and percentages for both employees and employers used in the social security calculation.	Chapter 4, "Setting Up Country-Specific Tables," (ESP) Setting Up Spanish Workforce Tables, page 36
20. (ESP) Define the risk codes that will apply to employees in your organization.	Chapter 4, "Setting Up Country-Specific Tables," (ESP) Setting Up Spanish Workforce Tables, page 36
21. (ESP) Define the hiring centers to attach to employee personnel records.	Chapter 4, "Setting Up Country-Specific Tables," (ESP) Setting Up Spanish Workforce Tables, page 36

CHAPTER 2

Understanding PeopleSoft Human Resources Administer Workforce

This chapter provides an overview of PeopleSoft Human Resources Administer Workforce and discusses:

- Business processes supported by PeopleSoft Human Resources Administer Workforce.
- PeopleSoft Human Resources Administer Workforce integrations.
- Designing PeopleSoft Human Resources Administer Workforce.

PeopleSoft Human Resources Administer Workforce

PeopleSoft Human Resources Administer Workforce provides the foundation for your human resource management system. The data entered into the Administer Workforce business process is available to all of the PeopleSoft Human Resources business processes as well as the other applications in the PeopleSoft HRMS suite.

PeopleSoft Human Resources Administer Workforce Business Processes

The PeopleSoft Human Resources Administer Workforce business process includes five basic steps:

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

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

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

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

- Personal data, such as name, address, and employment eligibility.
- Job data, such as supervisor, department, and salary.

- Employment data, such as tenure with your organization.

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

3. Entering additional data into the record.

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

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

4. Updating the record.

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

5. Viewing and reporting on employee data.

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

Prerequisites

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

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

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

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

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

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

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Labor Relations

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Setting Up Banks and Bank Branches"

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Setting Up Local Country Functionality"

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Working With Multiple Jobs"

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Understanding PeopleSoft HRMS System Data Regulation"

Chapter 4, "Setting Up Country-Specific Tables," page 21

PeopleSoft Human Resources Administer Workforce Integrations

PeopleSoft Human Resources integrates with all the PeopleSoft HRMS applications, with other PeopleSoft applications, and with third-party applications.

PeopleSoft Human Resources shared tables are available to many PeopleSoft HRMS applications. In addition, data in many HR tables is available to any PeopleSoft application that is set up to subscribe to the published messages.

PeopleSoft Human Resources Administer Workforce integrates with the following PeopleSoft applications:

- Payroll for North America
- All Global Payroll Country Extensions.
- PeopleSoft Time and Labor
- PeopleSoft Benefits Administration
- PeopleSoft HRMS Portal Solutions
- PeopleSoft Pension Administration
- PeopleSoft Resume Processing
- PeopleSoft Stock Administration
- PeopleSoft eBenefits
- PeopleSoft eCompensation Manager Desktop
- PeopleSoft eCompensation
- PeopleSoft eDevelopment

- PeopleSoft eEquity
- PeopleSoft ePay
- PeopleSoft eProfile Manager Desktop
- PeopleSoft eProfile
- PeopleSoft eRecruit Manager Desktop
- PeopleSoft eRecruit

CHAPTER 3

Setting Up the Administer Workforce Business Process

This chapter discusses how to:

- Define duty types and reasons for personnel actions.
- (USF) Define award actions.
- Define employee identification.
- Define additional employment data.
- Create checklists.

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

Defining Duty Types and Reasons for Personnel Actions

This section provides an overview of personnel action reasons and discusses how to define personnel action reasons.

Understanding Personnel Action Reasons

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

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

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

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

Positions and Action Reasons

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

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

Global Assignments and Action Reasons

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

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

Pages Used to Define Duty Types and Reasons for Personnel Actions

Page Name	Object Name	Navigation	Usage
Action Reason Table	ACTRSN_TBL_GBL	Set Up HRMS, Product Related, Workforce Administration, Action Reasons	Define or modify personnel action reasons.
Duties Type	TEMP_DUTIES_TBL	Set Up HRMS, Product Related, Workforce Administration, Temporary Duties	Define or modify duty types for Temporary Assignments.
Action Reason Table	PRCSRUNCNTL	Set Up HRMS, Product Related, Workforce Administration, Action Reason Report	Run the Action Reason Table report (PER710). This report lists the reason codes for each personnel action code and arranges them alphabetically by action.

See Also

[Chapter 8, "Entering Additional Data in Human Resources Records," Entering Temporary Assignments, page 194](#)

Defining Personnel Action Reasons

Access the Action Reason Table page.

Action Reason Table	
Action:	DTA Data Change
Reason Code:	STC
Action Reason Find View All First 1 of 1 Last	
*Effective Date:	01/01/1900  *Status: Active   
*Description:	Status Change
Short Description:	Status Chg
Germany	
☐ Spokesmen Committee Approval ☐ Company Doctor's Approval	
Canada	
*Canadian ROE Reason:	Other 
Benefits Employee Status:	Active 
Benefits Administratn Action:	DTA
USA	
COBRA Action:	
Benefits Employee Status:	Active 
Benefits Administratn Action:	DTA

Action Reason Table page (1 of 2)

The screenshot displays the 'Action Reason Table' interface with the following sections:

- Mexico:**
 - IMSS Termination Reason: [Dropdown]
 - INFONAVIT Reason: [Dropdown]
 - IMSS Print Form:**
 - ☐ Employee Register
 - ☐ Employee Termination
 - ☒ Salary Change
 - ☐ N/A
 - SUA Reason:**
 - ☐ Employee Register
 - ☐ Employee Termination
 - ☒ Salary Change
 - ☐ Re-enter
 - ☐ N/A
- Australia:**
 - Australian Public Service:**
 - Movement Code: [Text] [Search Icon]
- Spain:**
 - Employee Status: [Dropdown]
 - Social Security Action: [Dropdown]
- Brazil:**
 - *CAGED Action / Reason: [Not Applicable]
 - *RAIS Action / Reason: [Not Applicable]

Action Reason Table page (2 of 2)

(DEU) Germany**Spokesmen Committee Approval**

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

Company Doctor's Approval

Select this check box, if relevant, for this action reason.

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

Select the status associated with this action.

Benefits Administration Action (benefits administration action)

If a particular Action/Reason Code combination affects benefits in some way, you'll enter the PeopleSoft Benefits Administration event classification for that combination in the Benefits Administration Action field. The Benefits Administration process will use this information to determine what rules to apply when evaluating eligibility for, and availability of, benefit option changes in response to this personnel action.

(USA) USA

COBRA Action	If a particular Action/Reason Code combination affects benefits in a manner which may trigger qualification for COBRA, you'll enter the COBRA action (event classification) here. For instance, if employees are terminated for certain reasons, they may have the right to COBRA benefits. As such, you could associate action reasons associated with employee terminations to a specific COBRA action. The COBRA Administration process will use this information to evaluate whether a qualified loss of benefits coverage has occurred.
Benefits Employee Status	Select the status associated with this action.
Benefits Administration Action (benefits administration action)	If a particular Action/Reason Code combination affects benefits in some way, you'll enter the PeopleSoft Benefits Administration event classification for that combination in the Benefits Administration Action field. The Benefits Administration process will use this information to determine what rules to apply when evaluating eligibility for, and availability of, benefit option changes in response to this personnel action.

(MEX) Mexico

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

IMSS Termination Reason	Select the reason for termination. Values are <i>Agreement, Collective Termination, Employee Death, Employee Transfer, Inability, Lay-off, Leave, Mental or Physical Disability, N/A, Pension-Off, Retirement, Voluntary Renounce, and Work Risk Disability</i> .
INFONAVIT Reason	Select a reason to indicate to INFONAVIT why the INFONAVIT loan payments will stop. Values are <i>Death, Disability, Disengage, Never Work, Other, Retirement, and Transfer</i> .
IMSS Print Form	Select the reason for a change in an employee's information. This is done to notify IMSS when an employee is hired, rehired, terminated, or has a salary change. Values are <i>Employee Register, Employee Termination, Salary Change, and N/A</i> .
SUA Reason	Select the reason that gets printed on the SUA notification. Values are <i>Employee Register, Employee Termination, Salary Change, Re-enter, and N/A</i> .

(AUS) Australia

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

(ESP) Spain

Employee Status	Select the employee status associated with this Action Reason.
Social Security Action	Select the social security action associated with this Action Reason.

(BRA) Brazil

CAGED Action/Reason Enter the type of CAGED entry to report for actions with this reason.
(Cadastro Geral de Empregados e Desempregados action/reason)

RAIS Action/Reason Enter the type of action to report to RAIS for actions with this reason.
(Relação Anual de Informações Sociais action/reason)

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Labor Relations, “Setting Up Labor Relations Data”

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Setting Up Additional Human Resources Base Benefits Features,” Setting Up COBRA Administration

(USF) Defining Award Actions

This section discusses how to set up award actions and run a report of the actions that you define.

Pages Used to Define Award Actions

Page Name	Object Name	Navigation	Usage
Award Action Data	GVT_AWD_ACTN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Award Actions	Define monetary and nonmonetary awards types.
Award Type Table	PRCSRUNCNTL	Workforce Administration , Job Information, Reports, Award Action (USF)	Run the Award Type table report (FGPER810).

Defining Award Codes

Access the Award Action Data page.

Award Action Data

Action: AWD

Reason Code: PER

Award Action information

Find | View All
First ◀ 1 of 1 ▶ Last

Effective Date: 01/01/1980

Status: Active

***Nature of Action Code:** 885 Performance Award

***Award Classification:** Award

Payroll Data

Earnings Code: FAC

Account Code: FCB-4476EXTSAL-USA

GL Pay Type:

☐ Pay in Separate Paycheck?

☐ Gross-Up

Award Action Data page

Nature of Action Code	Enter the reason associated with this award action.
Award Classification	Select the award classification, either <i>Award</i> or <i>Bonus</i> .
Earnings Code	Select an earnings code to associate with this Award Action.
Account Code	Select an account code to associate with this Award Action.
GL Pay Type (general ledger pay type)	Select the pay type to associate with this Award Action.
Pay in Separate Paycheck?	Select if this Award Action should be paid in a separate check.
Gross-Up	Select to indicate the award or bonus amount must be grossed-up for payroll purposes.

See Also

[Chapter 16, “\(USF\) Processing Personnel Action Requests,” Granting Performance Awards, page 403](#)

Defining Employee Identification

This section discusses how to:

- Define visas and work permits.
- Define driver license data.

Pages Used to Define Employee Identification

Page Name	Object Name	Navigation	Usage
Visa/Permit Table	VISA_PERMIT_TABLE	Set Up HRMS, Product Related, Workforce Administration, Visas/Permits	Define visas/permits and associated supporting documents that governments require for noncitizens to work in the countries where your organization does business.
Supporting Documents Table	SUPPORT_DOC_TABLE	Set Up HRMS, Common Definitions, Supporting Documents	Set up codes for the types of documents required to obtain visas and permits for employees and their dependents, such as birth certificates, letters of employment, and marriage certificates.
Drivers License Type Tbl	DRIVE_LIC_TBL	Set Up HRMS, Product Related, Workforce Administration, Driver's License Type	Enter the types of licenses you are tracking.

Defining Visas and Work Permits

Access the Visa/Permit Table page.

Visa/Permit Table

Country: USA United States

Visa/Permit Type: BU1 Business Traveller

Visa/Permit Data
Find | View All
First 1 of 1 Last

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

***Description:** Business Traveller

Short Description: Business

***Visa/Permit Classificatn:** Visa 

Comment: This visa is required for employees frequently working between Canada and United States but not living outside of domicile country. 

Supporting Documents Needed
Customize | Find | View All
First 1-3 of 3 Last

1	BIRTH		Birth Certificate		
2	LTREMP		Letter of Employment		
3	PSSPRT		Passport and Photos		

Visa/Permit Table page

You must have previously defined the visa/permit classifications on the Supporting Document Table.

Visa/Permit Classificatn (Visa/Permit Classification) Select the appropriate visa/permit classification, if applicable.

Supporting Documents Needed Select the appropriate supporting documents needed to obtain the visa or permit.

Defining Additional Employment Data

This section discusses how to:

- Define ethnic groups.
- Define religions.
- Define volunteer organizations.

Pages Used to Define Additional Employment Data

Page Name	Object Name	Navigation	Usage
Ethnic Groups	ETHNIC_GROUP_TBL	Set Up HRMS, Product Related, Workforce Administration, Ethnic Groups	Define ethnic groups. Regulations in some countries require ethnic group tracking by employers. The system tables contain predetermined values for defining ethnic groups and religions. You can add or edit values and descriptions.
Religions	RELIGION_TBL	Set Up HRMS, Product Related, Workforce Administration, Religions	Define religions.
Volunteer Organization Table	VOLUNTEER_ORG_TABL	Set Up HRMS, Product Related, Workforce Administration, Volunteer Organizations	Add volunteer organization data that your company recognizes or sponsors.

Creating Checklists

PeopleSoft Human Resources enables you to make checklists to help you remember all the details associated with hiring employees or handling other Administer Workforce tasks.

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

To make a checklist:

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

This section discusses how to set up standard checklists.

Pages Used to Create Checklists

Page Name	Object Name	Navigation	Usage
Checklist Item Table	CHKLST_ITEM_TABLE	Set Up HRMS, Common Definitions, Checklists, Checklist Items	Create items to include in checklists.
Checklist Table	CHECKLIST_TABLE	Set Up HRMS, Common Definitions, Checklists, Checklist	Create checklists for the various types of processing you do in the Administer Workforce business process.
Dynamic Link	DL_LINK_TBL	Set Up HRMS, Common Definitions, Checklists, Dynamic Link	Define dynamic links used in worklist items.

Setting Up Standard Checklists

Access the Checklist Table page.

Checklist Table

Checklist Code: DEUHIR

Checklist Item Find | View All First 1 of 1 Last

***Effective Date:** 01/01/1980 ***Status:** Active **Checklist Type:** Hiring

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

Assignment Checklist Item				Customize Find	First 1-15 of 15 Last
	*Sequence	*Item Code		Link ID	
1	50	HIR10	Personal Data	Personal Data	
2	100	HIR20	Send Contract	Send Contract	
3	200	HIR30	Signed contract received	Signed contract received	
4	300	HIR40	Hire Applicant	Hire Applicant	
5	400	HIR50	ID Badge	ID Badge	
6	420	HIR60	Request Security Access		
7	450	HIR70	Tax Card Received		
8	500	HIR80	Update Tax Data	Update Tax Data	
9	550	HIR100	Insurance Passport Available		
10	600	HIR110	Update Social Insurance	Update Social Insurance Data	
11	650	HIR120	Child Benefit Information		
12	700	HIR130	Bank information	Bank information	
13	800	HIR140	Company Car	Company Car	
14	900	HIR150	Probation Period	Probation period?	
15	1000	HIR160	Eintrittsstichtag		

Checklist Table page

Checklist Type

Select the type of checklist you want to create.

Sequence and Item Code

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

To rearrange the order in which the items appear, change the sequence numbers to the numerical order you want. For example, to reverse the order of *Outline Office hours/holidays (100)* and *Outline job responsibilities (200)*, assign a lower number to *Outline job responsibilities* (such as 150) and a higher number to *Outline Office hours/holidays* (such as 175). When you save your changes, the system automatically redisplay the items in the new order.

CHAPTER 4

Setting Up Country-Specific Tables

This chapter provides an overview of country-specific table setup and discusses how to set up:

- French workforce tables.
- German workforce tables.
- Dutch SAMEN countries.
- Italian workforce tables.
- Japanese supervisor levels.
- Festive advance religions tables for the Singapore and Malaysia.
- New Zealand disability codes.
- Spanish workforce tables.
- Brazilian establishments.

Understanding Country-Specific Table Setup

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

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

See Also

Chapter 3, "Setting Up the Administer Workforce Business Process," page 9

(FRA) Setting Up French Workforce Tables

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

This section provides an overview of maintaining French social security tracking codes and discusses how to:

- Define hours type codes.

- Enter French occupational illness codes.

Maintaining French Social Security Tracking Codes

In France, CPAMs are the local social security offices that manage health coverage for French workers. The French government established and regulates CPAMs. If you're managing a French workforce, you'll need to identify and track the CPAM offices that impact your enterprise.

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

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

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Monitor Health and Safety, "Creating and Tracking Incidents"

Pages Used to Set Up French Workforce Tables

Page Name	Object Name	Navigation	Usage
FRA CPAM Table	CPAM_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, CPAM Table	Modify or add a CPAM ID to your human resources system.
FRA CRAM Table	CRAM_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, CRAM Table	Modify or add a CRAM code to your human resources system.
Hour Type Table	HOURS_TYPE_FRA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, Hours Type	Define hours type codes that you'll use to track job hours information for French workers.
Occupational Illness	OCC_ILLNESS_FRA	Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Occupational Illness Tbl – FRA	Enter French occupational illness codes.

Defining Hours Type Codes

Access the Hour Type Table page.

Hour Type Table					
Hour Types					
		Customize Find 		First ◀ 1-4 of 4 ▶ Last	
	*Hours Type	*Description	Short Description		
1	2*8	2*8 Hours	2*8 Hours	+	-
2	3*8	3*8 Hours	3*8 Hours	+	-
3	IND	Individual Hours	IND	+	-
4	STA	Standard Hours	Standard	+	-

Hour Type Table page

Hours Type

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

Hours Type	Description
3*8	Indicates a shift work pattern. For example, in the manufacturing or industrial sector, production can go on round the clock. The production workers are split into three groups—each group is working one after the other, eight hours a day. Every month, for example, the workers shift to another group. Shift workers who were working the 12 p.m. to 8 a.m. shift move to the 8 a.m. to 4 p.m. shift. Because this type of work schedule implies a lot of constraints in their personal life, those workers are often paid a shift bonus.
2*8	Works the same way as the 3*8 option, but indicates that there are two work shifts as opposed to three.
STA	Indicates that the work hours follow a regular pattern using the job's standard hours as indicated on the Job Information page.
IND	Indicate that the worker's hours follow an individualized pattern that is different from the company's default standard hours. Indicate this amount in the Standard Hours field on the Job Information page. This field is used by the French Employee report (indicator 413 of the Employee Survey for the Trade/Services industry).

Entering French Occupational Illness Codes

Access the Occupational Illness page.

Prof. Dis.	*Description	Short Description
30	Asbestos affections	Asbestos
42	Deafness lesions	Deafness
54	Poliomyelitis	Poliomyeli

Occupational Illness page

Use this page to define occupational illness categories for French workers. Use the categories when you enter information on the French Disability page.

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

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

(DEU) Setting Up German Workforce Tables

This section provides an overview of social insurance in Germany and discusses how to:

- Define accident insurance codes.
- Enter German national DEUEV codes.

Understanding Social Insurance

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

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

Pages Used to Set Up German Workforce Tables

Page Name	Object Name	Navigation	Usage
Accident Insurance - Accident Insurance Table	ACCDT_INS_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Accident Insurance, Accident Insurance Table	Define accident insurance codes for German employees.
Accident Insurance - Accident Insurance Address	ACCDT_INS2_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Accident Insurance, Accident Insurance Address	Enter address information for this accident insurance provider.
BA Cd Table (Bundesanstalt für Arbeit Code Table)	BA_CD_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, BA Codes	Add or update Bundesanstalt für Arbeit job codes. PeopleSoft maintains the BA Code table so that you can add or update it. All job codes are published by the German Federal Labor Office (Bundesanstalt für Arbeit) in Verzeichnis der Berufsbezeichnungen and are required on reports to the German Federal Labor Office.
Function Code Table	FUNCTION_CD_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Function Code	Add or maintain job codes for conducting statistical analyses of your workforce in Germany. For example, you can use the codes you establish here to examine how many consultants, administrators, support staff, or sales representatives make up your workforce.
Nation Duvo Table	NATION_DUVO_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Nation Duvo	Add or update nation DEUEV information.

Page Name	Object Name	Navigation	Usage
Industrial Inspection	INDUST_INSP_GER	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Industrial Inspection	Set up German industrial inspection codes that you associate with locations in your organization. Note. Industrial inspection codes are not effective-dated and have no status.
SI Unit (social insurance unit)	SI_UNIT_GER	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Social Insurance Unit	Set up German social insurance unit codes that you associate with locations in your organization.

Defining Accident Insurance Codes

Access Accident Insurance - Accident Insurance Table page.

The screenshot displays the 'Accident Insurance Table' page. At the top, there are tabs for 'Accident Insurance Table' and 'Accident Insurance Address'. The main section is titled 'Accident Insurance:' with a value of 'CH'. Below this, there are several input fields and a table. The fields include:

- *Effective Date: 01/01/1900
- *Status: Active
- *Description: Professional Association for the Chemical Industry
- Short Description: Prof Chem
- Accid Ins Lim: (empty)
- Currency: USD

 Below the fields is a table with the following structure:

*Hazard	*Description	Hazard class
1	040	production/processing/reprocessing of radioactive materia

 The table has a 'Hazard class' column with a value of 1.5. There are also navigation buttons like 'Find', 'View All', 'First', 'Last', and '1 of 1'.

Accident Insurance Table page

Hazard

Enter the code for the hazard type.

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

Hazard Class

Enter the class, or degree, of the covered hazard.

Entering German Nation DEUEV Codes

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

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

Access the Nation Duvo Table page.

Nation Duvo Table

Nationality Key:

126

*Description:

Denmark

Short Description:

Denmark

Nationality:

Danish

Nationality Code:

DK

Country:

DNK

☐ OECD Country

☐ EU-Land

Nation Duvo Table page

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

Nationality	Enter the nationality associated with this country. For example, the nationality associated with The Netherlands is <i>Dutch</i> .
Nationality Code	The DEUEV Directive specifies a unique two-character nationality code for each nationality key. These nationality codes are different from the three-character ISO country codes stored on the Country table.
Country	Indicate an ISO country code to be associated with the DEUEV Directive nationality key.
OECD Country (Organization of Economic Cooperation and Development country)	Select to indicate the nationality key is for an OECD country. Germany carefully regulates the types of industries in which citizens of non-OECD countries, like Iraq, can work. For example, non-OECD nationals are restricted from working in defense-related industries or for companies that produce products involving protected trade technologies.
Note. There isn't always a one-to-one correspondence between ISO countries on the Country table and the nationality keys on the Nation DEUEV table. The German DEUEV Directive makes nationality distinctions that have no direct relationship to ISO country standards.	
EU-Land (European Union land)	Select to indicate this is European Union land. Workers from European Union nations are tracked for purposes of reporting to the German Social Insurance administration.

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

(NLD) Setting Up Dutch SAMEN Countries

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

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

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

This section discusses how to update the list of SAMEN countries.

Page Used to Set Up Dutch SAMEN Country Table

Page Name	Object Name	Navigation	Usage
SAMEN Country Table	SAMEN_CNTRY_NLD	Set Up HRMS, Product Related, Workforce Administration, SAMEN Country NLD	Update the current list of SAMEN countries.

Updating the List of SAMEN Countries

Access the SAMEN Country Table page.

SAMEN Country Table				
SAMEN Country				
Customize Find View 100 First 11-20 of 150 Last				
	*Country	Description		
11	BDI	Burundi	+	-
12	BEN	Benin	+	-
13	BFA	Burkina Faso	+	-
14	BGD	Bangladesh	+	-
15	BHR	Bahrain	+	-
16	BHS	Bahamas	+	-
17	BIH	Bosnia and Herzegovina	+	-
18	BLZ	Belize	+	-
19	BMU	Bermuda	+	-
20	BOL	Bolivia	+	-

SAMEN Country Table page

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

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

(ITA) Setting Up Italian Workforce Tables

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

Pages Used to Set Up Italian Workforce Tables

Page Name	Object Name	Navigation	Usage
ITA C.I.A. Table (Contratto Intergrativo Aziendale)	CIA_TBL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, C.I.A., ITA C.I.A. Table	Enter Company Integrative Contract information.

Page Name	Object Name	Navigation	Usage
ITA City Table	CITY_TABLE_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Cities, ITA City Table	Use the Italian City Table page to maintain the city data. Update the table by downloading the file supplied annually from the Minisero delle Finanze Website and the running the Italian City Update process. You can enter the postal codes for cities to expedite data entry during the hiring process
ITA INAIL Table	INAIL_TBL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, INAIL Codes, ITA INAIL Table	Define the INAIL (Istituto Nazionale per l'Assicurazione degli Incidenti sul Lavoro) position code and rate for INAIL contribution.
ITA INPDAI Table	INPDAI_TBL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, INPDAI Codes, ITA INPDAI Table	Define the INPDAI (Istituto Nazionale di Previdenza per I Dirigenti di Aziende Industriali) position codes for pension funds.
ITA INPS Table	INPS_TBL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, INPS Codes, ITA INPS Table	Define INPS (Istituto Nazionale per la Previdenza Sociale) data for social security contributions.
ITA PREV Table	PREV_TBL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, PREV Codes, ITA PREV Table	Define PREVINDAI codes, descriptions and PREVINDAI Position Codes.
Company Codes - INPS Codes	COMP_INPS_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company Codes, INPS Codes	Link the company with INPS codes.
Company Codes - INAIL Codes	COMP_INAIL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company Codes, INAIL Codes	Link the company with INAIL codes.
Company Codes - INPDAI Codes	COMP_INPDAI_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company Codes, INPDAI Codes	Link the company with INPDAI codes.
Company Codes - PREV Codes	COMP_PREV_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company Codes, PREV Codes	Link the company with PREV codes.

Page Name	Object Name	Navigation	Usage
Company Codes - C.I.A. Codes	COMP_CIA_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company Codes, C.I.A. Codes	Link the company with C.I.A. codes.
Company/Estab Codes - INPS Codes	EST_INPS_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company/Estab Codes, INPS Codes	Link the company and establishment with INPS codes.
Company/Estab Codes - INAIL Codes	EST_INAIL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company/Estab Codes, INAIL Codes	Link the company and establishment with INAIL codes.
Company/Estab Codes - INPDAI Codes	EST_INPDAI_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company/Estab Codes, INPDAI Codes	Link the company and establishment with INPDAI codes.
Company/Estab Codes - PREV Codes	EST_PREV_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company/Estab Codes, PREV Codes	Link the company and establishment with PREV codes.
Company/Estab Codes - C.I.A. Codes	EST_CIA_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company/Estab Codes, C.I.A. Codes	Link the company and establishment with C.I.A. (Contratto Intergrativo Aziendale) codes.
IT Country FCode	COUNTRY_DEFN_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Country Fiscal Codes, ITA Country FCode	Define the city fiscal code.
ITA Seniority Notification	SENIORIT_NOTIF_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Seniority Notification Periods, ITA Seniority Notification	Define seniority termination notification periods for employment categories.
Turnover Action	TRV_ACT_REAS_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Turnover Reasons, Turnover Action	Setup action reasons for job turnover actions.
Productive Unit	UNITA_PROD_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Production Unit, Productive Unit	Define production units based on your company's agreements with the unions.

Defining INPS Codes

Access the ITA INPS Table page.

ITA INPS Table

INPS Code: KIINPS011

INPS Find | View All First 1 of 1 Last

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

***Description:** BUSINESS INSTITUTE - ATT. 20
 Short Description: Inps Cd 11

INPS Activity Desc: CREDITO

INPS Position Code: K102
 INPS Site: MILANO

Stat Contr Code: 011
 INPS Fiscal Code: INPS011K11

Authorization Number: 56789
 Istat Code: 200

Address

Country: ITA Italy

Address:

Piazza Gobetti, 123
 20126 Milano (MI)

[Edit Address](#)

ITA INPS Table page

INPS Activity Desc (description)	Enter company activity description to be reported on the INPS declarations.
INPS Position Code	Enter company INPS position codes.
INPS Site	Enter INPS sites to which the Company must send the declarations.
Stat Contr Code (statistical contribution code)	Enter the Statistical Contribution Code to be reported on the INPS declarations.
INPS Fiscal Code	Enter the Company Fiscal Code.
Authorization Number	Enter the authorization codes to be reported on the INPS declarations.

Istat Code Enter the Istat Code to be reported on the INPS declarations.

Defining Seniority Notification Periods

Access the ITA Seniority Notification page.

ITA Seniority Notification

SetID: ITA

Labor Agreement: K101

Labor Agreement

Find | View All

First 1 of 1 Last

Effective Date: 01/01/1980

Status: Active

Description: Credito e finanza

Customize | Find | View All

First 1-3 of 3 Last

	*Category	Subcategory	Subcategory 2	From Seniority	To Seniority	Notif. Days	Type of Day		
1	AREA1	AUX		1	30	30	Working	+	-
2	AREA2	1		31	90	60	Working	+	-
3	AREA3	2		1	60	30	Working	+	-

ITA Seniority Notification page

- Category

Select the job category to which this labor agreement notification applies.
- Subcategory

Select the job subcategory to which this labor agreement notification applies.
- Subcategory 2

Select the job subcategory 2 to which this labor agreement notification applies.
- From Seniority

Enter the beginning of the seniority period to which this labor agreement notification applies. The seniority must be entered in month units.
- To Seniority

Enter the end of the seniority period to which this labor agreement notification applies. The seniority must be entered in month units.
- Notif. Days (notification days)

Enter, in days, the seniority applicable to this period. For example, a labor agreement might require that employees employed for more than 6 months but less than 12 months have a notification period of 30 calendar days.
- Type of Day

Indicate whether the notification uses working days or calendar days.

(JPN) Setting Up Intercompany Transfer Company Data

This section provides an overview and describes how to set up company data for intercompany transfers.

Understanding Setup of Company Data for Intercompany Transfers

In any intercompany transfer, one of the companies is outside of the PeopleSoft database in which your organization's company data has been set up. Therefore it is necessary to create data in the database for those companies. These setup steps are for that purpose.

To set up company data for intercompany transfers for Japan:

- Set up a “dummy” paygroup to use as the compensation indicator if you create intercompany transfers in which the host company is responsible for paying the employee.
- Set up company and department codes to use for companies outside of the database.
- Set up supervisor level codes to use for companies outside of the database.

See Also

PeopleSoft 8.8 Global Payroll PeopleBook, “Working With Payee Data”

Chapter 12, “(JPN) Tracking Intercompany Transfers (Shukkou),” Indicating the Home or Host Compensation Owner , page 304

Pages Used to Set Up Intercompany Transfer Company Data

Page Name	Object Name	Navigation	Usage
IC Trans External Company/Dept (internal company transfer external company/department)	INTCPX_CPY_JPN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, IC Trans External Company/Dept	Set up company and department codes for companies outside the database to use for intercompany transfers.
IC Trans External Superv Lvl (intercompany transfer external supervisor level)	INTCPX_SPV_JPN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, IC Trans External Superv Lvl	Set up supervisor level codes for companies outside the database to use for intercompany transfers.

(JPN) Setting Up Japanese Supervisor Levels

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

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

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

Table 1: Supervisor Levels

Supervisor Level	Description
01	Director
02	Senior Manager

Table 2: Departments

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

Table 3: Position, Supervisor Level and Departments

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

When you create or update employee Job records, you can enter the supervisor levels that you set up in the Supervisor Level table on the Job Information page. And, because supervisor level is an employee identifier just like Jobcode, Position, or Manager Level, it appears throughout the system. You can view it or enter it on many of the pages on which you can also view or enter job codes, positions, and manager levels. You can also view it on Job Summary and throughout the Plan Careers and Successions and Track Global Assignments business processes.

Page Used to Set Up Japanese Supervisor Levels

Page Name	Object Name	Navigation	Usage
IC Trans External Superv Lvl (intercompany transfer external supervisor level)	INTCPX_SPV_JPN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, IC Trans External Superv Lvl	Add and modify supervisor level data. Note. This table has SetID as its key.

(SGP, MYS) Setting Up Festive Advance Religions Tables for Singapore and Malaysia

Regulations in some countries require ethnic group tracking by employers. The system tables contain predetermined values for defining ethnic groups and religions. You can add or edit values and descriptions.

Page Used to Set Up and Religions for Singapore and Malaysia

Page Name	Object Name	Navigation	Usage
Religions MYS/SGP	RELIGION_TBL_FA	Set Up HRMS, Product Related, Workforce Administration, Religions MYS/SGP	Define religions and festive advance types for Malaysia and Singapore. Select the appropriate festive advance type from the FA Holiday Type field associated with this religion

(NZL) Setting Up New Zealand Disability Codes

Define disability codes used for New Zealand to track employee disabilities.

Page Used to Set Up New Zealand Disability Codes

Page Name	Object Name	Navigation	Usage
Disability Codes	DISABILITY_TBL_NZL	Set Up HRMS, Product Related, Workforce Administration, Disabilities NZL	Create new disability type codes or modify existing codes.

(ESP) Setting Up Spanish Workforce Tables

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

This section discusses how to:

- Enter country codes for social security reporting.
- Enter insurance company descriptions and address information.
- View risk codes.
- Define maximum and minimum social security ceilings.
- Define maximum and minimum social security bases by work group.
- Define contribution rates and percentages.
- Enter company information.
- Define hiring centers.

Pages Used for Spanish Workforce Tables

Page Name	Object Name	Navigation	Usage
Social Security Country Codes	SOCS_CNTRY_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Country Codes Table	Enter country codes valid for social security reporting purposes.
Industry Activity	INDSTRY_ACT_CD_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Industry Activity Table	Enter industry activity codes and descriptions. The industry activity code helps determine the employer social security number.
Insurance Company	INSUR_COMP_CD_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Insurance Company Table	Enter insurance company descriptions and address information.
Soc Sec Risk Code (social security risk code)	SOCSEC_RSKTBL_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Soc. Sec. Risk Code Table	View the risk codes that can apply to employees in your organization.
Scheme	SOC_SEC_SCHEME_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Soc. Sec. Scheme Table, Scheme	Review or define maximum and minimum social security ceilings, as well as review or define the minimum hourly rate for each social security scheme.
Work Group	SOC_SEC_WRKGRP_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Soc. Sec. Scheme Table, Work Group	Define maximum and minimum social security bases by work group, as well as the minimum hourly rate used to calculate the base for part-time employees.
Contribution	SOC_SEC_CNT_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Soc. Sec. Scheme Table, Contribution	Define the contribution rates and percentages for both employees and employers used in the social security calculation.
Company Setup	SOCS_SETUP_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Soc. Sec. Company Setup	Enter specific company information, including data needed for social security purposes.
Hiring Center	HIRING_CENTER_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Hiring Center Table	Define the hiring centers you will attach to employee personnel records on the Contract Data page. You connect every Spanish employee with a hiring center.

Entering Country Codes for Social Security Reporting

Access the Social Security Country Codes page.

Social Security Country Codes

Country Codes for Social Security					
Customize Find View All					
First 1-6 of 12 Last					
	Country	Description	SS Country Cd		
1	BEL	Belgium	056		
2	DEU	Germany	276		
3	DNK	Denmark	208		
4	ESP	Spain	724		
5	FRA	France	250		
6	GBR	United Kingdom	826		

Social Security Country Codes page

Country Enter the standard ISO country code.

SS Country Cd (social security country code) Enter the country code used for social security processing.

Entering Insurance Company Descriptions and Address Information

Access the Insurance Company page.

Edit Address Click to enter or modify address information.

Viewing Risk Codes

Access the Soc Sec Risk Code page.

Soc Sec Risk Code

Social Security Risk Code: 004

Social Security Risk

Find | View All | First 1 of 1 Last

*Effective Date: 01/01/1980

Status: Active

*Description: Vineyard farming (Rioja)

IMS Risk Rate: 1.50

IT Risk Rate: 3.00

Total Rate: 4.50

Soc Sec Risk Code page

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

PeopleSoft delivers all social security risk codes as system data.

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

Defining Maximum and Minimum Social Security Ceilings

Access the Scheme page.

Scheme	Work Group	Contribution
Scheme ID: 0111 Currency: ESP		
Scheme Find View All First ◀ 1 of 1 ▶ Last		
*Effective Date:	01/01/2001	Status: Active
*Description:	General Scheme	
Short Description:	Gral Sche.	
Lower Ceiling:	84150.00	
Upper Ceiling:	415950.00	
Minimum Hourly Rate:	419.00	

Scheme page

Lower Ceiling

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

Upper Ceiling

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

Minimum Hourly Rate

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

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

Defining Maximum and Minimum Social Security Bases by Work Group

Access the Work Group page.

Scheme		Work Group		Contribution				
Scheme ID:	0111	Currency:	ESP					
Scheme Find View All First 1 of 1 Last								
Effective Date:	01/01/2001	Status:	Active					
Lower Ceiling:	84150.00	Upper Ceiling:	415950.00	Minimum Hourly Rate:	419.00			
Social Security Work Group Customize Find View All First 1-6 of 11 Last								
	*SS Wrk Group	*Description	Frequency	Minimum Amount	Maximum Amount	Min Hourly (Part Time)		
1	01	Engineers & BA & BSc	Monthly	125430.	415950.	627.00	+	-
2	02	Technical, Experts & Workshop engineers	Monthly	104040.	415950.	520.00	+	-
3	03	Administrative & Workshop managers	Monthly	90450.0	414950.	453.00	+	-
4	04	Assistants without a degree	Monthly	84150.0	415950.	419.00	+	-
5	05	White Collar officials	Monthly	84150.0	396060.	419.00	+	-
6	06	Subordinates	Monthly	84150.0	396060.	419.00	+	-

Work Group page

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

SS Work Group (social security work group)

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

Frequency

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

Minimum Amount

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

Maximum Amount

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

Min Hourly (Part Time)

Enter the minimum hourly rate used to calculate the common contingencies funding base for part-time employees.

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

See Also

Chapter 6, "Hiring Your Workforce," Entering Employee Job Information, page 92

Defining Contribution Rates and Percentages

Access the Contribution page.

The screenshot displays the 'Contribution' page in the PeopleSoft Global Payroll for Spain application. The page is divided into several sections:

- Scheme Information:** Scheme ID: 0111, Currency: ESP.
- Effective Date and Status:** Effective Date: 01/01/2001, Status: Active.
- Ceiling and Rate:** Lower Ceiling: 84150.00, Upper Ceiling: 415950.00, Minimum Hourly Rate: 419.00.
- Contribution Details:** *S.S. Contribution ID: 001, *Description: General Regular Employee, Short Description: G.E.R., SSN EE Type: Regular, Contribution Type: Percentage.
- Contribution - Concept Table:**

*Concept	Employer Percentage	Employee Percentage
1 Common Contingency	23.600000	4.700000

Contribution page

If you need to define rates and percentages for schemes other than the General Scheme, you can do so on this page.

S.S. Contribution ID (social security contribution ID)

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

Possible values for the SS Contribution ID are:

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

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

SSN EE Type (social security employer type)

Select one of the following values:

- *Regular:* Select to define the percentages used to calculate the contributions of employees with regular contracts.

	• <i>Apprentice</i>: Select to define rates used to calculate the contributions of apprentices. • <i>Training</i>: Select to define rates used to calculate the contributions of employees with training contracts.
Contribution Type	Select <i>Percentage</i> if you will be entering percentages in the Employer Percentage or Employee Percentage fields. If you select <i>Percentage</i>, the Employer and Employee Rate fields become unavailable for data entry. Select <i>Rate</i> if you will be entering rates in the Employer or Employee Rate fields. If you select <i>Rate</i>, the Employer and Employee Percentage fields become unavailable for data entry. Important! You should always select <i>Percentage</i> for regular employees, and <i>Rate</i> for apprentices and trainees.
Concept	Indicates the type of contributions for which the system displays corresponding employee or employer contribution rates or percentages in the Contribution-Concepts grid. Possible values are: • <i>Common Contingency</i> • <i>FOGASA</i> • <i>Non Structural Overtime</i> • <i>Permanent Disability D & S</i> • <i>Professional Training</i> • <i>Structural Overtime</i> • <i>Temporary Disability</i> • <i>Unemployment</i>
Employer Rate	Displays the employer contribution rate associated with the concept listed in the left-hand column of the grid. If you are defining a new rate, enter the rate in this field. Note. Only contributions of apprentices and trainees are based on fixed rates.
Employer Percentage	Displays the employer contribution percentage associated with the concept listed in the left-hand column of the grid. Social security contributions of regular employees are calculated as percentages of a funding base. If you are defining a new percentage, enter the percentage in this field.
Employee Rate	Displays the employee contribution rate associated with the concept listed in the left-hand column of the grid. If you are defining a new rate, enter the rate in this field.
Employee Percentage	Displays the employee contribution percentage associated with the concept listed in the left-hand column of the grid. Social security contributions of regular employees are calculated as percentages of a funding base. If you are defining a new percentage, enter the percentage in this field.

Entering Company Information

Access the Company Setup page.

Company Setup

Company: KE1 Business Institute - Spain **Fiscal Code:** B25896547

Company Data Find | View All First 1 of 1 Last

Effective Date: 01/01/2000

SS Country Cd: 724 Spain

Process Label Data

Silcon Key: 23568451 **Deliver Process Code:** Winsuite

Authorization Key: 25689451

Bank Account Data

***Source Bank ID:** KE01 BSCH

Holder Name:

Contact Data

Contact Name: KE0001 Rodriguez Salgado, Antonio

Contact Phone: **Contact Fax:**

Company Setup page

SS Country Cd (social security country code)

Enter the social security country code for the company.

Silcon Key

Enter the key provided by the Social Security General Treasury to identify your company during electronic file transfers and to access the shared network.

Deliver Process Code

Select how the company submits social security reports to the Social Security General Treasury. Values include *MS DOS*, *Magnetic D*, or *Winsuite*. Winsuite is the official system for sending flat files containing monthly reports and human resource changes using software provided by the Social Security General Treasury and payroll flat files (like those generated by PeopleSoft Global Payroll).

Authorization Key

Enter the authorization code to access Winsuite provided by the Social Security General Treasury.

Source Bank ID

Enter the name of the bank the company uses.

Holder Name

Enter the name the company uses at the bank.

Defining Spanish Hiring Centers

Access the Hiring Center page.

Hiring Center

Hiring Center Code: KE1

Hiring Center Find | View All First 1 of 1 Last

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

*Description: General Hiring Center

Short Description: General

Responsible ID: KE0001 Rodriguez Salgado, Antonio

Responsible Role: Representative

Unemployment Office: INEM

Signature City: Madrid

Hiring Center page

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

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Understanding PeopleSoft HRMS System Data Regulation”

(BRA) Setting Up Establishments

A company may have several establishments. You must enter data required for reporting purposes for each establishment, such as different ID types.

Note. All Brazilian establishments must belong to a company.

This section discusses how to:

- Enter types of establishment ID codes.
- Set up establishments.

Pages Used to Set Up Establishments

Page Name	Object Name	Navigation	Usage
Establishment ID Type	ESTAB_TYPE_BRA	Set Up HRMS, Product Related, Workforce Administration, Establishment ID Type BRA	Enter types of establishment ID codes and the format for each ID.
Additional Info - Brazil (additional information – Brazil)	ESTAB_TBL_BRA	Set Up HRMS, Product Related, Workforce Administration, Establishment BRA, Additional Info - Brazil	Set up establishments.
Centralization Data	CENTRALIZATION_BRA	Set Up HRMS, Product Related, Workforce Administration, Centralization Data BRA	Group establishments to obtain centralized data for multiple reports such as SEFIP and CAGED.

Enter Types of Establishment ID Codes

Access the Establishment ID Type page.

Establishment ID Type

Country: BRA Brazil

National ID Types					Customize Find View All 		First	1-6 of 6	Last
Type	Default	Description	Short Desc	ID Format					
CAGED	☒	CAGED Authorization	CAGED	99.99-999			+	-	
CAIXA	☐	CAIXA	CAIXA	999999999999999			+	-	
CEI	☐	CEI	CEI	999999999999999			+	-	
CNAE	☐	CNAE	CNAE	99999			+	-	
CNPJ	☐	CNPJ	CNPJ	999999999999999			+	-	
MCPIS	☐	Matr Conv /PIS	MCPIS	XXXXXXXXXXXX			+	-	

Establishment ID Type page

Type

Enter the type of establishment ID code. You can enter ID types that are not legal IDs (national IDs) but are required for certain reports.

Default

Select to establish this type of ID code as the default for the selected country.

ID Format

Specify the format of the ID code. Enter a 9 for each digit of the ID number.

The system has edit masks that apply special formatting to some of the ID types you enter on this page. The system applies the following formatting to these ID types:

- CNPJ: 99.999.999/9999-99
- CNAE: 99.99-9

Setting Up Establishments

Access the Additional Info - Brazil page.

Establishment Address		Additional Info - Brazil	
Establishment ID: KRC1-1			
		Find View All First 1 of 1 Last	
Effective Date: 01/01/1980			
Establishment Data			
*County Code:	1	*Inscr. Type:	CNPJ
*Estab Type Cd:	Other		
PIS Data			
PV Adm:	4444		
Date:	01/01/2002		
RAIS Data			
RAIS Estab Pref:	0	# of Owners:	2
Own Serv %:	20.00	Kit Admin %:	10.00
Meals Agr %:	15.00	Trans Meals %:	
Food Basket %:	10.00	Feeding Agr %:	2.00
☐ Closing Activities RAIS		☐ PAT Participation Option	

Additional Info - Brazil page (1 of 3)

▼ GPS/SEFIP Data	
GPS Pay Code:	2100
FPAS Code:	551
SS 3th Party %:	3.00
Work Risk %:	5.00
Company %:	20.00
Independent %:	
SAT Code:	3322
Third Party Code:	1524
SAT % 15 Years:	10.00
SAT % 20 Years:	15.00
SAT % 25 Years:	20.00
Philant Exemp %:	
▼ DIRF Responsible	
*DIRF Rep Type:	Employee
DIRF Resp ID:	KR0001 Marcia Oliveira
▼ SEFIP Responsible	
*SEFIP Rep Type:	Employee
SEFIP Resp ID:	KR0001 Marcia Oliveira
▼ RAIS Responsible	
*RAIS Rep Type:	Employee
RAIS Resp ID:	KR0001 Marcia Oliveira

Additional Info - Brazil page (2 of 3)

Establishment ID		Customize Find	First	1-3 of 3	Last
*Type	Description	ID			
CNAE	CNAE	51926		+	-
CNPJ	CNPJ	99470907000122		+	-
MCPIS	Matr Conv /PIS	12345678901		+	-

Additional Info - Brazil page (3 of 3)

County Code Enter the county code.

Inscr. Type (inscription type) Select the company inscription type, *CNPJ* or *CEI*.

Estab Type Cd (establishment type code) Select the establishment type code, which is based on the size of the establishment. Values are *Micro*, *Other*, and *Small*.

Note. The following sections contain setup data for various reports. In this release, PeopleSoft delivers only the GPS, SEFIP, and CAGED reports. The other reports will be delivered later.

PIS (Programa de Integração Social) Data

Enter information used to generate the PIS report.

PV Adm (PV administration) Enter the number of the *Caixa Economica Federal* (Federal Saving Bank) branch that generates the file with the issued resources for the PIS payment of employees (TSO file).

Date The date the Federal Saving Bank generated the TSO file.

RAIS (Relação Anual de Informações Sociais) Data

Enter information used to generate the RAIS report.

RAIS Estab Pref (RAIS establishment prefix) Enter the prefix only if the establishment register appears for RAIS as a key differentiation. RAIS assigns the establishment prefix.

of Owners (number of owners) Enter the number of owners working in the establishment.

Own Serv % (owner service percentage) Enter the owner service percentage.

Kit Admin % (kitchen administration percentage) Enter the kitchen administration percentage.

Meals Agr % (meals agreement percentage) Enter the meals agreement percentage.

Trans Meals % (transported meals percentage) Enter the transported meals percentage.

Food Basket % (food basket percentage) Enter the food basket percentage.

Feeding Agr % (feeding tickets agreement percentage) Enter the feeding tickets agreement percentage.

Closing Activities RAIS Select to indicate that the establishment closed its activities during the base year (the year for which you are currently reporting). A RAIS report uses this information.

PAT Participation Option (Programa de Alimentação do Trabalhador participation option) Select to indicate the establishment participates in PAT.

GPS/SEFIP (Guia de Recolhimento da Previdência Social/ Sistema Empresa de Recolhimento do FGTS e Informações à Previdência Social) Data

Enter information used to generate the GPS/SEFIP report.

GPS Pay Code Enter the company's social security contribution code.

SAT Code	Enter the work accident insurance code.
FPAS Code	Enter the FPAS (<i>Fundo de Previdência e Assistência Social</i>) social assistance and pension fund code. The activity type of the company determines this code. The system identifies all third parties and their respective percentages assigned to this code and generates a total percentage of collection for the establishment.
Third Party Code	Enter the code of the third party that collected service from the establishment. The system uses these codes to identify the third parties involved in a specific collection. The SEFIP report uses this code to get the GFIP value.
SS 3th Party % (social security third party percentage)	Enter the total percentage of social security contributed by a third party for a specific collection. The system uses this value to obtain the Other Entities Amount on the social security payment form (GPS).
SAT % 15 Years (SAT percentage up to 15 years), SAT % 20 Years (SAT percentage up to 20 years), and SAT % 25 Years (SAT percentage up to 25 years)	Enter the percentages that apply to only the eligible employees for each case of special retirement (with 15, 20, and 25 years of service). The system uses this percentage to obtain the special retirement component of the INSS total amount for collection.
Worth Risk %	Enter the establishment's identified predominant worth risk percentage. The system uses this percentage to obtain worth risk component of the INSS total amount for collection.
Company %	Enter the percentage to use to obtain the company component of the INSS total amount for collection.
Independent %	Enter the percentage to use to obtain the independent component of the INSS total amount for collection.
Philant. Exemp % (philanthropy exemption percentage)	Enter the percentage to use to obtain the philanthropy exemption component of the INSS total amount for collection.

DIRF (Declaração de Informações à Receita Federal) Responsible

Complete this group box only for DIRF centralizing establishments.

DIRF Rep Type (DIRF representative type)	Select whether the party responsible for generating the DIRF file is a <i>Company</i> , <i>Employee</i> , or <i>Non Empl</i> (non-employee).
DIRF Resp ID (DIRF responsible ID)	Enter the company code or employee ID of the party responsible for generating the DIRF file.

SEFIP Responsible

SEFIP Rep Type (SEFIP representative type)	Select whether the party responsible for generating the SEFIP file is a <i>Company</i> , <i>Employee</i> , or <i>Non Empl</i> (non-employee).

SEFIP Resp ID (SEFIP responsible ID)

Enter the company code or employee ID of the party responsible for generating the SEFIP file.

RAIS Responsible

Complete this group box only for RAIS centralizing establishments.

RAIS Rep Type (RAIS representative type)

Select whether the party responsible for generating the RAIS file is a *Company*, *Employee*, or *Non Empl* (non-employee).

RAIS Resp ID (RAIS responsible ID)

Enter the company code or employee ID of the party responsible for generating the RAIS file.

Establishment ID

Type

Enter an establishment ID type.

ID

Enter the establishment’s ID.

Grouping Establishments for Centralized Data

Access the Centralization Data page.

Centralization Data

Effective Date: 01/01/2002

Process Type: CAGED

Centralizer Data

Find | View All | First 1 of 5 Last

Centralizer: KRC1-1 Matriz São Paulo

Centralized Data

Customize | Find | View All | First 1-2 of 2 Last

	Establishment ID	Description		
1	KRC1-1	Matriz São Paulo	+	-
2	KRC1-2	Filial Porto Alegre	+	-

Centralization Data page

Process Type

When you add a record, select the type of data you want to centralize, such as SEFIP or CAGED.

Centralizer

Enter the name of the establishment that creates centralized data for reporting purposes.

Establishment ID

Enter the IDs of all establishments whose data the centralizer collects.

CHAPTER 5

Overview of the Hiring Process

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

- Choose a hiring process.
- Enter data during the hiring process.
- Hire when you use the Manage Positions business process.
- Use PeopleSoft Workflow to manage hiring.
- Set up the hiring process.

Understanding the Hiring Process

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

Business Units and SetIDs

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

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Understanding PeopleSoft HRMS System Data Regulation"

Hiring Versus Updating

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

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

See Also

Chapter 13, “Updating Workforce Information,” page 319

Chapter 16, “(USF) Processing Personnel Action Requests,” Personnel Actions and Employee Status, page 394

Hiring Process User Security Considerations

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

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

See Also

PeopleTools 8.42 PeopleBook: PeopleTools Security

Choosing a Hiring Process

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

When You Want To Add...	Use This Hiring Process	And This Component
A new employee who hasn’t applied for a job with your organization and for whom no data currently exists in the system.	See <u>Chapter 6, “Hiring Your Workforce,” page 63.</u> See <u>Chapter 7, “(USF) Hiring Employees,” page 137.</u> See <i>PeopleSoft 8.8 Human Resources PeopleBook: Manage French Public Sector</i>, “Hiring French Public Sector Employees”.	Hire Employee component in the Workforce Administration, Increase Workforce menu. USF: Hire Employee USF component in the Workforce Administration, Increase Workforce menu. FPS: Hire Employee component in the Workforce Administration, Increase Workforce menu, select FPS Business Rules.

When You Want To Add...	Use This Hiring Process	And This Component
A job applicant you've been tracking through the Recruit Workforce business process.	See Chapter 6, "Hiring Your Workforce," page 63. See Chapter 7, "(USF) Hiring Employees," page 137. See <i>PeopleSoft 8.8 Human Resources PeopleBook: Manage French Public Sector</i>, "Hiring French Public Sector Employees".	Hire component in the Recruiting, Hire Applicants menu. USF: Hire USF component in the Recruiting, Hire Applicants menu. Hire component in the Recruiting, Hire Applicants menu, select FPS Business Rules.
An additional job for an existing employee.	See Chapter 6, "Hiring Your Workforce," page 63. See Chapter 7, "(USF) Hiring Employees," page 137. See <i>PeopleSoft 8.8 Human Resources PeopleBook: Manage French Public Sector</i>, "Hiring French Public Sector Employees".	Assign Additional Job component in the Workforce Administration, Job Information menu. USF: Concurrent Hire USF component in the Workforce Administration, Job Information menu. FPS: Add Concurrent Empl Record FPS component in the Workforce Administration, Job Information menu.
A person who isn't a legal employee of your organization.	See Chapter 6, "Hiring Your Workforce," page 63. See Chapter 7, "(USF) Hiring Employees," page 137.	Add Non-Employee component in the Workforce Administration, Increase Workforce menu.

See Also

[Chapter 6, "Hiring Your Workforce,"](#) Assigning Employee IDs, page 64

PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce, "Hiring Applicants"

Entering Data During the Hiring Process

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

- Employee ID

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

- Personal information

Includes name, address, birth date, birthplace, and marital status.

- General employment information

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

- Specific job data

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

- Earnings data

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

- Benefits program

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

Hiring When You Use the Manage Positions Business Process

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

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

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

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

See Also

Chapter 7, “(USF) Hiring Employees ,” page 137

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Using PeopleSoft HRMS,” Driving Your System by Employee or Position

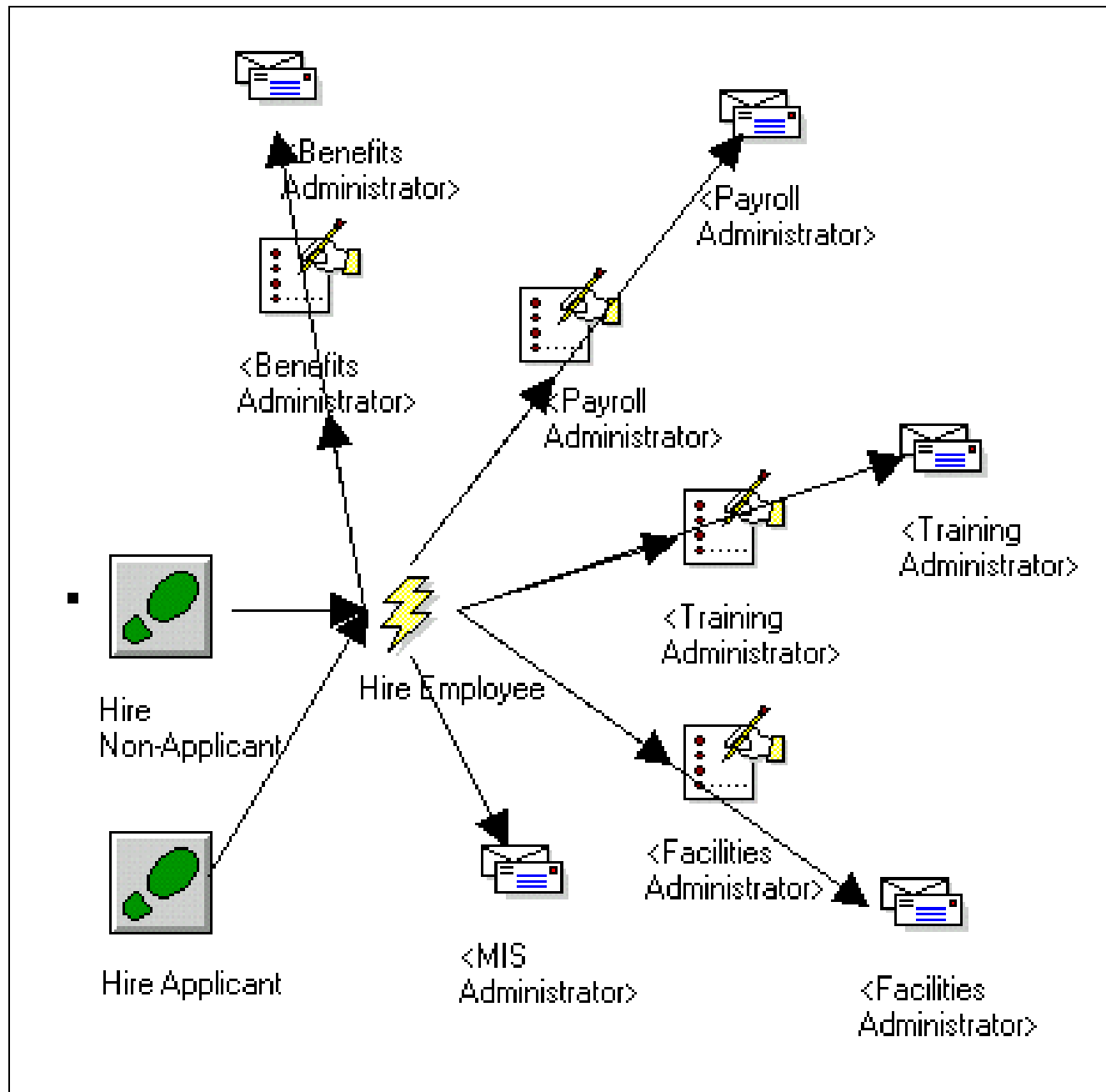
Using PeopleSoft Workflow to Manage Hiring

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

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

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

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



Hire employee activity

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Using PeopleSoft Workflow”

PeopleTools 8.42 PeopleBook: PeopleSoft Workflow

Where to Find the Workflow

The following describes where to find the workflow.

Activity	Hire Employee
Event	Hire Employee

The Three R's of Hiring an Employee

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

Rules

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

Roles

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

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

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

Routings

The workflow performs the following routings:

Role	Email Sent	Worklists Generated
Benefits administrator	Yes	Yes. The system directs the benefits administrator to the Manage Benefit Enrollment activity for the new hire.
Payroll administrator	Yes	Yes. The system directs the payroll administrator to the Update Deduction Data activity for the new hire.
MIS administrator	Yes	No.

Role	Email Sent	Worklists Generated
Facilities administrator	Yes	Yes. The system directs the facilities administrator to the Company Property pages to issue the appropriate company property to the new hire.
Training administrator	Yes	Yes. The system directs the training administrator to the Enroll Students activity to enroll the new hire in company orientation classes.

Setting Up the Hiring Process

To assist you in the hiring process, you can create checklists for processing employee hires and other administrative tasks. Use standard checklists you've already created in the Checklist Table, or modify them for particular employee's processing requirements. You must have assigned an employee ID before you can create an employee checklist.

This section provides a list of prerequisites and discusses how to create employee checklists.

Prerequisites

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

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

See Also

[Chapter 3, "Setting Up the Administer Workforce Business Process," page 9](#)

[Chapter 4, "Setting Up Country-Specific Tables," page 21](#)

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Setting Up Banks and Bank Branches"

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Setting Up Local Country Functionality"

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Working With Multiple Jobs"

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Understanding PeopleSoft HRMS System Data Regulation"

Page Used in Setting Up the Hiring Process

Page Name	Object Name	Navigation	Usage
Employee Checklist	EMPLOYEE_CHECKLIST	Workforce Administration, Personal Information, Person Checklist	Create checklists for processing employee hires and other administrative tasks.

Creating Employee Checklists

Access the Employee Checklist page.

Employee Checklist

Santos, Antonio Employee EmplID: KU0010 Empl Rcd#: 0

Employee Checklist Find | View All First 1 of 1 Last

*Checklist Date: 11/18/2002 Checklist: F00006 Applicant Hire Checklist

Responsible ID:

Comment:

Employee Checklist Items					
	*Sequence	*Checklist Item Code	Description	*Briefing Status	
1	1	F00033	Application Form filled out	Initiated	+ -
2	2	F00034	Resume on hand	Initiated	+ -
3	3	F00035	Interview testing set up	Initiated	+ -
4	4	F00036	References contacted	Initiated	+ -
5	5	F00037	Verify employment history	Initiated	+ -
6	6	F00038	Proof of Education	Initiated	+ -
7	7	F00039	Licence/Certification verified	Initiated	+ -
8	8	F00040	Offer Letter generated	Initiated	+ -
9	9	F00041	Acceptance received	Initiated	+ -
10	10	F00042	Start Date confirmed	Initiated	+ -

Employee Checklist page

Checklist Date	Enter the date the checklist was created. The default is the current date.
Checklist	Enter a checklist code to use a standard checklist you've created in the Checklist table. Use an existing list or modify it to create a new employee checklist. To create a new checklist, leave the field blank. Then enter all checklist item information in any order you choose.
Responsible ID	Enter the employee ID of the person responsible for creating and carrying out the items on the checklist.
Comment	You can enter comments longer than the three lines shown.
Sequence	The system enters this if you enter a checklist code.
Checklist Item Code	The system enters this if you enter a checklist code. To add new items to a standard checklist, insert a data row between items in the checklist and enter a new sequence number that falls between the existing numbers. Or add a new data row at the end of the list. Then enter all pertinent checklist item information.
Briefing Status	Select a status.

Link ID

Click to access the page where you can accomplish the checklist task. Links exist only for those tasks for which you created a dynamic link.

See Also

Chapter 3, “Setting Up the Administer Workforce Business Process,” Creating Checklists, page 17

CHAPTER 6

Hiring Your Workforce

This chapter lists common elements and discusses how to:

- Assign employee IDs.
- Hire an employee.
- Add nonemployees.
- Define a nonemployee provider.
- Add job applicants.
- Add concurrent jobs.
- Run the Canadian Hire List report.

Understanding the Hiring Process

This chapter discusses the pages in the Hire Employee component, which you use when you add a new record to PeopleSoft Human Resources. Many of these pages provide links to information that you enter or use in other PeopleSoft Human Resources business processes. Some countries may have additional data requirements during the hiring process. Entering additional data either during or after the hiring process that is not covered in the system pages discussed in this chapter can be found in this book in the chapter “Managing Country-Specific Workforce Data.”

Federal users should refer to the chapter “USF – Hiring Employees.”

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

See Also

Chapter 10, “Managing Country-Specific Workforce Data,” page 265

Chapter 7, “(USF) Hiring Employees,” page 137

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Using PeopleSoft Workflow”

PeopleSoft 8.8 Human Resources PeopleBook: Manage French Public Sector, “Hiring French Public Sector Employees”

Common Elements Used in This Chapter

Cross Border Worker	Select if the employee lives in one country and works in another. These employees have special tax or social security needs.
Ethnic Group	Select the ethnic group. You set up ethnic groups on the Ethnic Groups page. (AUS) Affirmative Action reports and the ATSI (Aboriginal and Torres Strait Islander) code come from this page. (USA) Values are based on US Federal Equal Employment Opportunities ethnic categories. Use ethnic group information to compile the establishment's Affirmative Action Plan and to generate several EEO reports. (UK) Values are based on UK Equal opportunity ethnic categories.
FA Holiday Type (festive advance holiday type)	Select the festive advance holiday type.
Festive Advance Eligible From	Select the date that the employee becomes eligible for the selected festive advance pay program.
Festive Advance Pay Program	Select the festive advance pay program for the employee.
Military Status	Select the employee's current military status.
Owns 5% (Or More) of Company	Select if the employee owns 5 percent or more of the company. The system uses this field to identify highly compensated employees for the Non-Discrimination Testing - 401(k)/401(m) report (NDT004) in the Manage Base Benefits business process of PeopleSoft Human Resources.
Regulatory Region	Select the regulatory region.
Religion	Select the religion. You set up religions on the Religions page. Workplaces in Australia and New Zealand set this field to <i>Not Applicable</i> .
Security Clearance	If the employee has received a security clearance, enter the level of clearance: <i>Classified</i> , <i>Secret</i> , or <i>Top Secret</i> .
Smoker and As of	Indicate if the employee is a smoker and enter the date the he or she started smoking. An employee's smoker status affects benefits eligibility and rate determination in PeopleSoft Human Resources Manage Base Benefits and is required for regulatory reporting.

Assigning Employee IDs

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

- **Automatically:** If you use automatic ID assignment, the system adds IDs sequentially as you hire new employees. The system maintains the last assigned ID in Installation Table 2.
- **Manually:** You enter the employee IDs, using whatever system you choose for your organization. With manual entry, you don't need to assign IDs sequentially. Assigning IDs manually is the only way you can include characters in the IDs.

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

Assigning Employment Record Numbers

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

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

See Also

Chapter 6, "Hiring Your Workforce," Working With Multiple Employment Record Numbers , page 130

(JPN) Assigning Internal Employee IDs

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

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

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

Employee ID Changes at Rehire

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

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

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

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

Example

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

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

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

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

Employee ID Changes at Permanent Intercompany Transfer

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

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

Employee ID Changes Not Due to Termination

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

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

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

Hiring an Employee

This section provides an overview of the hiring process pages and discusses how to:

- Enter name information.
- Enter address, phone, and email address information.
- Enter personal information.
- Establish work eligibility and diversity.
- Enter employee job location and position information.
- Enter employee job information.
- Enter National Labor agreement data.
- Enter employee payroll processing data.
- Enter employee salary plan information.
- Enter employee compensation information.
- Enter optional employment-related data.
- Distribute job earnings.
- Specify benefit program enrollment.

Understanding the Hiring Process Pages

The hiring process includes two components and three individual pages. To assist in the hiring process, each page involved in the hiring process has links to the other hiring process pages at the bottom of the page. The links are:

- Personal Data

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

- Job Data

Accesses the Job Data component

- **Employment Data**
Accesses the Employee Information page.
- **Earnings Distribution**
Accesses the Job Earnings Distribution page.
- **Benefits Program Participation**
Accesses the Benefit Program Participation page.

Note. The pages in the Hire, Add Concurrent Job and Add Non Employee components are identical to those in the Job Data and Personal Data components and share the same object names. The only difference is that you use one set of pages when hiring an employee and another to update employee information. This applies to all global (GBL) navigations as well as the USF navigations for Hire and Add Concurrent Job.

See Also

Chapter 5, “Overview of the Hiring Process,” page 53

Chapter 13, “Updating Workforce Information,” page 319

Chapter 3, “Setting Up the Administer Workforce Business Process,” page 9

Chapter 4, “Setting Up Country-Specific Tables,” page 21

Pages Used to Hire an Employee

Page Name	Object Name	Navigation	Usage
Name History	PERSONAL_DATA1	• Workforce Administration, Increase Workforce, Hire Employee, Name History • Recruiting, Hire Applicants, Hire, Name History	Enter name information.
Address History	PERSONAL_DATA1B	• Workforce Administration, Increase Workforce, Hire Employee, Address History • Recruiting, Hire Applicants, Hire, Address History	Enter address, phone, and email address information for an employee.
Personal History	PERSONAL_DATA2	• Workforce Administration, Increase Workforce, Hire Employee, Personal History • Recruiting, Hire Applicants, Hire, Personal History	Enter personal information about the employee.

Page Name	Object Name	Navigation	Usage
Identity/Diversity	PERSONAL_DATA3	- Workforce Administration, Increase Workforce, Hire Employee, Identity/Diversity - Recruiting, Hire Applicants, Hire, Identity/Diversity	Establish an employee's eligibility to work and verify an employee's identity.
Work Location	JOB_DATA1	Workforce Administration, Job Information, Job Data, Work Location Click the Job Data link at the bottom of any page in the hiring component.	Enter position and location information for the employee's job, including the regulatory region, company, department, and location.
Job Information	JOB_DATA_JOBCODE	Workforce Administration, Job Information, Job Data, Job Information Click the Job Data link at the bottom of any page in the hiring component.	Enter information about the employee's job, including employment status, employee class, shift, or standard hours.
Job Labor	JOB_LABOR	Workforce Administration, Job Information, Job Data, Job Labor Click the Job Data link at the bottom of any page in the hiring component.	Enter National Labor agreement data if the employee belongs to a National Labor agreement.
Payroll	JOB_DATA2	Workforce Administration, Job Information, Job Data, Payroll Click the Job Data link at the bottom of any page in the hiring component.	Enter employee payroll processing data. The payroll system and pay group information that you enter here affects component compensation processing on the Compensation page.
Salary Plan	JOB_DATA_SALPLAN	Workforce Administration, Job Information, Job Data, Salary Plan Click the Job Data link at the bottom of any page in the hiring component.	Enter information about the employee's salary plan.
Compensation	JOB_DATA3	Workforce Administration, Job Information, Job Data, Compensation Click the Job Data link at the bottom of any page in the hiring component.	Enter employee compensation information.
Employment Information	EMPLOYMENT_DTA1	Click the Employment Data link at the bottom of any page in the Employee Hire or Job Data components.	Enter optional employment-related data, such as the employee's business title and supervisor.

Page Name	Object Name	Navigation	Usage
Job Earnings Distribution	JOB_DATA_ERNDIST	Click the Earnings Distribution link at the bottom of any page in the Employee Hire or Job Data components.	Distribute the employee's compensation for one job among different departments, job codes, accounts, shifts, position numbers, or general ledger pay types. If the employee's pay is regularly charged to more than one cost center, designate how much to allocate to each cost center.
Benefits Program Participation	JOB_DATA_BENPRG	Click the Benefits Program Participation link at the bottom of any page in the Employee Hire or Job Data components.	Specify the benefit program in which the employee is enrolled for benefits in PeopleSoft Human Resources or in PeopleSoft Benefits Administration.

Entering Name Information

Access the Name History page.

Name History | Address History | Personal History | Identity/Diversity

EmpID: NEW Employee

Name Type: Primary Find First 1 of 1 Last

*Type of Name: Primary + -

Name History: Find First 1 of 1 Last

*Effective Date: 11/18/2002 + -

Format Using: USA United States Refresh the Name Field

Person Name

Prefix: Mr First: Antonio Middle: Rene Last: Cardoso Suffix: + -

Name: Cardoso, Antonio Rene

Define the type of business rules to be applied before proceeding to the hire

☒ Core Business Rules ☐ FPS Business Rules

Personal Data Job Data Employment Data Earnings Distribution Benefits Program Participation

Name History page

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

- EmplID** If you are hiring a new employee and have instructed the system to assign IDs, the field displays the value *NEW* until you save this record. Otherwise, the system displays the value that you entered to access the page.
- Type of Name** Select the type of name; for example *Primary*.
- Refresh the Name Field** Click after entering the employee's name information to display the employee name in the Name field.
- Define the type of business rules to be applied before proceeding to the hire** Select whether to apply *Core Business Rules* or *FPS Business Rules*.
 If you select *Core Business Rules*, the links to the Job Data component and other hiring pages appear.
 If you select *FPS Business Rules*, the links to the Job Data component and other hiring pages do not appear.

Entering Address, Phone, and Email Address Information

Access the Address History page.

Name History | **Address History** | Personal History | Identity/Diversity

Cardoso, Antonio Rene EmplID:

Address Type Find | View All First 1 of 1 Last

*Address Type: HOME + -

Address History Find | View All First 1 of 1 Last

*Effective Date: 11/18/2002 *Status: Active + -

Country: USA United States

Address: [Edit Address](#)

Phones Customize | Find First 1-2 of 2 Last

*Phone Type	Telephone		
Home		+	-
Cellular		+	-

Email Addresses Customize | Find First 1 of 1 Last

*Email Type	*Email Address		
		+	-

Personal Data | [Job Data](#) | [Employment Data](#) | [Earnings Distribution](#) | [Benefits Program Participation](#)

Address History page

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

Address History

Edit Address

Click to access the Edit Address page to enter or update the employee's address information.

Note. (ITA) When entering Italian addresses, use the Address Search link on the Edit Address page to locate validate cities based on the province.

Phones

Phone Type and Telephone

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

Selecting *Main* designates a phone number as the individual's primary contact number.

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

Email Addresses

Email Type and Email Address

Select and email type and enter the employee's email address.

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

Entering Personal Information

Access the Personal History page.

Name History	Address History	Personal History	Identity/Diversity
Cardoso, Antonio Rene		EmplID:	
Personal Data Find View All First 1 of 1 Last			
*Effective Date:	11/18/2002		
*Gender:	Unknown		
Alternate Employee ID:			
*Highest Education Level:	A-Not Indicated	☐ Full-Time Student	
Language Code:			
*Marital Status:	Single	As of:	
	☐ Smoker	As of:	
Canada			
Bilingualism Code:			
Health Care Number:		Health Care Province:	
Switzerland			
Guardian:			
Germany			
Military Status:		Expected Military Date:	

Personal History page (1 of 3)

Spain	
Military Status:	
Social Security Affiliation Dt:	
France	
Date of First Entry in France:	
Military Status:	
CPAM ID:	
Italy	
Military Status Italy:	
Type of Service:	
Function or Rank:	
Military End Date:	
Japan	
Honseki Prefecture:	

Personal History page (2 of 3)

 USA	
Military Status:	Not indicated
Date Entitled to Medicare:	
☒ Eligible to Work in U.S.	
Employment Eligibility Proof	
1:	
2:	
 Mexico	
AFORE:	
Med Region Code:	
 Brazil	
Personal Data	
Ethnic Group:	
Nationality:	
Education Level:	
*Blood Type:	Unknown

[Personal Data](#)
[Job Data](#)
[Employment Data](#)
[Earnings Distribution](#)
[Benefits Program Participation](#)

Personal History page (3 of 3)

Alternate Employee ID

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

Highest Education Level

Select a value.

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

Full-Time Student

Select if the employee is a full-time student.

Language Code

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

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

Marital Status

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

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

As of

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

(CAN) Canada**Bilingualism Code**

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

Health Care Number and Health Care Province

Enter a number and select the health care province.

(CHE) Switzerland**Guardian**

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

(DEU) Germany**Military Status**

Select the employee's current status.

Expected Military Date

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

(ESP) Spain**Military Status**

Select the employee's current status.

Social Security Affiliation Dt (social security affiliation date)

Enter the date when the employee was assigned a Spanish Social Security number.

(FRA) France**Date of First Entry in France**

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

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

(ITA) Italy

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

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

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

(JPN) Japan

Honseki Prefecture Select the family prefecture, or place of registration. Tracking a worker's Honseki Prefecture is a matter of custom.

(USA) USA

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

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

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

(FPS) French Public Sector

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

(MEX) Mexico

AFORE (Retirement Funds Institution Code Mexico) Enter the AFORE code for the employee. Values include *Banamex*, *Bancomer*, *Dresdner*, *GNP*, *Garante*, *ING*, *Inbursa*, *Principal*, *Santander*, *Tepeyac*, *XXI*, and *Zurich*.

Med Region Code (medical region code) Enter the three-character code for the medical region where the employee resides.

See Also

Chapter 4, “Setting Up Country-Specific Tables,” Maintaining French Social Security Tracking Codes, page 22

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, “(CAN) Meeting Regulatory Requirements for Canada”

PeopleSoft 8.8 Payroll for North America PeopleBook, “Maintaining Payroll Data”

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Setting Up Core Human Resources Base Benefits Tables”

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Using PeopleSoft HRMS,” Understanding Effective Dates

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Working With Languages”

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Understanding PeopleSoft HRMS System Data Regulation”

PeopleTools 8.42 PeopleBook: PeopleSoft Process Scheduler

PeopleTools 8.42 PeopleBook: PeopleTools Global Technology

Establishing Work Eligibility and Diversity

Access the Identity/Diversity page.

Name History
Address History
Personal History
Identity/Diversity

Cardoso, Antonio Rene
EmplID:

Date of Birth:
Birth Country:
USA
United States

Age:
Years
Months
0
Birth State:
Birth Location:

☐ Waive Data Protection

Referral Source
Find | View All
First
1 of 1
Last

*Effective Date:
11/18/2002

Referral Source:
Unknown
Referral Source Detail:

Employee Referral ID:

Specific Referral Source:

☐ Applicant is a family member
☐ Previously Employed by Company

National ID
Customize | Find | View All
First
1 of 1
Last

Country	*National ID Type	Description	National ID	Primary ID		
USA	PR	Social Security Number		☒	+	-

Canada

*Visible Minority:
Not Visible

☐ Aboriginal Person

Identity/Diversity page (1 of 5)

78

PeopleSoft Proprietary and Confidential

Switzerland

Place of Origin

Customize | Find | First 1 of 1 Last

Place of Origin	Main Origin		
	☐	+	-

Germany

Nationality

Customize | Find | First 1 of 1 Last

Nationality Date	Nationality		
		+	-

United Kingdom

Expected Retirement Date:

Ethnic Group:

Community Background (NI)

Community Background:

Arrived by Direct Question ☐

Determination Date:

Identity/Diversity page (2 of 5)

USA

Ethnic Group:

Australia

Ethnic Group

Find | View All First 1 of 1 Last

Regulatory Region: United States Ethnic Group:

Religion

Find | View All First 1 of 1 Last

*Regulatory Region: United States Religion:

Malaysia

Ethnic Group

Find | View All First 1 of 1 Last

Regulatory Region: United States Ethnic Group:

Religion

Find | View All First 1 of 1 Last

*Regulatory Region: United States Religion:

Identity/Diversity page (3 of 5)

New Zealand

Ethnic Group
[Find](#) | [View All](#)
First 1 of 1 Last

Regulatory Region: United States
Ethnic Group:

Religion
[Find](#) | [View All](#)
First 1 of 1 Last

***Regulatory Region:** United States
Religion:

Singapore

Ethnic Group
[Find](#) | [View All](#)
First 1 of 1 Last

Regulatory Region: United States
Ethnic Group:

Religion
[Find](#) | [View All](#)
First 1 of 1 Last

***Regulatory Region:** United States
Religion:

France

Previous Employment Situation:

Identity/Diversity page (4 of 5)

India

Religion

***Regulatory Region:** United States
Religion:

Blood Type:
Caste:

Brazil

RG

Issued By:
Issued Date:
State:

CTPS

Series:
Exp Date:
State:

Voter Data

Zone:
Section:
City:
State:

Military Data

Series:
Region:
State:
Cert Type:
Category:

PIS / PASEP

Inscription Date:

[Personal Data](#)
[Job Data](#)
[Employment Data](#)
[Earnings Distribution](#)
[Benefits Program Participation](#)

Identity/Diversity page (5 of 5)

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

Date of Birth	Enter the employee's date of birth. If you leave this field blank, a warning message appears when you save the record. You can continue entering information after you acknowledge the message. Though the birth date isn't required for the Administer Workforce business process, the system uses it to calculate an employee's age in some benefit and payroll tasks. It also calculates dates, such as the UK expected retirement date, based on the employee's age.
Birth Country	Select a country. Based on the selected country, the system might display additional fields.
Age	When you enter a birth date, the system calculates the employee's age, in years and months.
Birth Location	Usually a city, town, or village.
Date of Death	This field does not appear during the hiring process. Use this field when updating employee records.
Waive Data Protection	European community employment and personal privacy legislation specifies that personnel information can't be passed across countries in the European Union without authorization from the employee. Select this check box if you've obtained the employee's consent to share personal data with users in other European Union member nations.

Referral Source

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

National ID

Country	Select the country that issued the worker's national ID.
National ID Type	The system enters the value that you established for this country on the National ID Type Table Page. You can override this default.

Note. (BRA) Add rows to enter one or more of the following IDs for the employee: RG number, voter registration card, PIS/PASEP number, and reserve certificate.

National ID

Enter the worker's national ID number. The system checks the format of your entry against the default format that you entered on the National ID Type Table page.

Primary ID

Select if the national ID is the employee's primary ID. If this is the only data row for this employee, the system selects the check box by default. You can clear it.

(GBR) For the UK the normal format of 2 letters followed by 6 digits and then one letter for National Insurance identification will default. Other options dependent on employee status are available.

(CAN) Verifying Social Insurance Numbers for Canadian Employees

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

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

(NLD) Verifying Social Security IDs for Dutch Employees

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

(CAN) Canada**Visible Minority**

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

Aboriginal Person

Select if the employee is a Canadian aboriginal person.

(CHE) Switzerland**Place of Origin**

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

Main Origin

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

(DEU) Germany**Nationality Date**

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

Nationality

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

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

(GBR) United Kingdom

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

(GBR) Understanding the UK Retirement Date Calculation

The employee's expected retirement date is based on the birth date that you entered on the Personal Data - Identity/Diversity page. For men in the U.K., the expected retirement date is always the 65th birthday. For women, it is the 60th birthday. The British government is introducing measures to raise the state pension age for women. The retirement age for women will gradually increase to 65 years between 2010 and 2020. The table below shows the expected retirement dates for women in the UK.

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

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

(GBR) Community Background

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

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

Arrived by Direct Question Select if you determined the worker's community background by asking the employee directly.

Determination Date

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

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

(MYS) Malaysia and (SGP) Singapore

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

(FPS) French Public Sector

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

(IND) India**Blood Type**

Select the employee's blood type or select Unknown. When the blood type is entered on this page at the time an employee is hired, a component interface updates the employee's blood type on the physical exam record. Thereafter, this field is disabled and defaults to displaying blood type data from the physical exam record.

Caste

Select the employee's caste.

(BRA) Brazil**Issued By**

Enter the *Registro Geral* (RG) issuing entity. Required if you enter the individual's RG number in the National ID group box.

Issued Date and State

Required if you enter the individual's RG number.

Zone, Section, City, and State

Required if a voter registration card is provided.

Inscription Date

Enter the date of registration at PIS / PASEP. Required if PIS/PASEP number is provided in the National ID group box.

Series

Enter the work card number.

Exp Date (expiration date)

Enter the work card's expiration date. Required if a *Carteira de Trabalho e Previdência Social* (CTPS) number is provided.

State

Enter the political subdivision of the CTPS issuing agency. Required if a CTPS number is provided.

Series, Region, and Category	Required if a reserve certificate is provided.
State	Enter the political subdivision of the issued reserve certificate. Required if a reserve certificate is provided.
Cert Type (certificate type)	Enter the type of military service: <i>Aeronautic, Army, Marine, or Other</i> . Required if a reserve certificate is provided.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Monitor Health and Safety, “Processing Rehabilitation, Claims, and Examination Data,” Tracking Employee Medical Exam Results

Chapter 13, “Updating Workforce Information,” Entering Deaths, page 339

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, “(AUS) Meeting Regulatory Requirements for Australia”

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, “(CAN) Meeting Regulatory Requirements for Canada”

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, “(NZL) Meeting Regulatory Requirements for New Zealand”

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, “(GBR) Meeting Regulatory Requirements for the United Kingdom”

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, “(USA) Meeting Regulatory Requirements for the United States”

Entering Employee Job Location and Position Information

Access the Work Location page.

Work Location		Job Information		Job Labor		Payroll		Salary Plan		Compensation	
Emmerson,Martin				Employee		EmplID: HU001		Empl Rcd#: 0			
Work Location Find First 1 of 1 Last											
Employee Status: Active		Date Created: 08/27/1996									
*Effective Date: 08/27/1996		Effective Sequence: 0		*Job Indicator: Primary Job							
Action / Reason: Hire											
Position Number: 19160004		Specialist - Customer Services		Position Entry Date: 08/27/1996							
Override Position Data				Position Management Record							
Regulatory Region: GBRWA		Wales - United Kingdom									
Company: KG1		Business Institute - UK									
Business Unit: GBR03		Administration - UK									
Department: 27000		Customer Services		Department Entry Date: 08/27/1996							
Location: KG03		Cardiff									
Supervisor ID:											
Reports To: 19160001		Director - Customer Services									
ID:											
Establishment ID:											

Work Location page (1 of 2)

Spain SSN Employer:	
Japan Internal Employee ID Internal EmplID:	
Intercompany Transfer Intercompany Transfer Flag:	
Internal Company Company: Business Unit: Department: Supervisor Level:	External Company External Company: External DeptID: External Supv Lvl:
Intercompany Transfer Start Dt: Intercompany Transfer End Date:	
Job Data Employment Data Earnings Distribution Benefits Program Participation	

Work Location page (2 of 2)

Date Created	The date that you entered this transaction.
Effective Date	When you hire an employee, the effective date that you enter here becomes the hire and original hire date.
Effective Sequence	Use this number to track multiple administrative actions that occur on the same day. The default value is 0, the correct number for new employees.
Job Indicator	Indicate whether this is the employee's primary or secondary job. Select <i>N/A</i> (not applicable) if those selections don't apply to this job. The system hides this field if you haven't selected the Multiple Jobs Allowed option on the Installation Table – Product Specific page, Human Resources Options.
Action/Reason	Select the action requiring you to create or modify this record. The system displays <i>Hire</i> by default (the appropriate entry when hiring an employee). You must enter an Action/Reason code when hiring an employee for a concurrent job.
Reason Code	If you've defined reasons for actions on the Action Reason Table Page, select a reason code.
Position Number	If you're driving part or all of the system by position, select a position number. Define positions on the Add/Update Position Info component. When you leave the Position field, the system completes position-related fields in the Job Data component with default data from the Add/Update Position Info component, including job code, department, location, and full- or part-time. The corresponding fields become unavailable for entry. You can make the switch to driving your system by position even if you initially set up your system to drive PeopleSoft Human Resources by employee. After setting up positions in PeopleSoft Human Resources Manage Positions, assign employees to positions in this field. PeopleSoft Human Resources issues a warning message if you assign an employee to a position that has already been filled by another employee and if a new employee appointment exceeds the maximum head count for that position. The system calculates the head count and shows the appropriate indicator in the Open/Filled field in the Add/Update Position Info component when you change employee assignments.
Position Entry Date	When you leave this field, the system populates this field with the effective date. You can override it.
Override Position Data	Click to enter exceptions to the default position data for this employee. This opens up the unavailable fields, including Job Code and Department, and you can override the entries in those fields. For example, the employee might have a higher salary grade than the standard grade that is associated with the position.

Note. If you override the defaults for position-related data, you must maintain the employee data manually—the system doesn't update the position data on the Job Data pages with data from the Add/Update Position Info component until you clear this check box.

Position Management Record

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

Company

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

Business Unit

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

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

Department

Select the code of the employee's department.

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

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

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

Use this field with the Paycheck Print program to indicate the department where the employee's paycheck is to be delivered. Depending on how you defined Paysheet Sequence on the Pay Group Table, the Department field might also affect the sequence in which paysheets are created.

Department Entry Date

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

Location

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

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

Reports To

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

ID

Enter a supervisor ID, if applicable.

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

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

Establishment ID

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

Establishment IDs are associated primarily with locations. Establishments are used for several countries for local regulatory reporting. These reports require each employee be assigned to a single establishment.

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

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

Note. (USA) USA regulatory reports require that the employee / establishment id association happen at the employee level.

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

Employee Status

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

(ESP) Spain

SSN Employer (social security number for employer)

Enter the company social security number, as assigned by the Spanish government, that applies to this employee.

(JPN) Japan

Internal EmplID

Enter the employee's internal ID.

See [Chapter 6, “Hiring Your Workforce,” \(JPN\) Assigning Internal Employee IDs, page 65.](#)

Note. You can store an internal employee ID if your company uses meaningful employee IDs, and those IDs themselves will need to change with certain employee data changes such as employment type changes. Internal employee IDs also appear on the JPN Job Summary page, and you can search the system by internal employee ID.

(JPN) Intercompany Transfer

This section enables you to specify intercompany transfer (shukkou) data for Japan. Enter information about the company and department the employee is transferring to/from in the appropriate group box, Internal Company or External Company. Values for the External Company group box are set up on the IC Transfer Company/Dept page.

Intercompany Transfer Flag

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

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

Select the blank value at the top of the list to remove all entries.

Internal Company and External Company

Select the home or host company, select a value in the Internal Company group box if the company is set up in the Company Table.

Business Unit

Select the home or host business unit for internal company transfers only.

Department and External DeptID (external department ID)

Select the home or host department ID, prompting from the Company Table component (for internal company transfers) for home departments and the IC Transfer Company/Dept page for host departments (external company transfers).

Supervisor Level and External Supv Lvl (external supervisor level)

Select the home or host supervisor level of the job at the home company, prompting from the Company Table component for home supervisor levels (for internal company transfers) and from the JPN IC Transfer Supervisor Lvl page for host supervisor levels (external company transfers).

Intercompany Transfer Start Dt (intercompany transfer start date)	If you enter host data, enter the start date of this intercompany transfer. Don't enter a date here if the Action is <i>RET</i> (retirement) and the Reason is <i>PIT</i> (permanent intercompany transfer).
Intercompany Transfer End Date	If you enter host data, enter the expected end date of this intercompany transfer. Don't enter a date here if the Action is <i>RET</i> and the Reason is <i>PIT</i>. The end date must be equal to or later than the effective date of the employee's current Job record.

Paying Employees on Disability

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

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

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

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

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

See Also

[Chapter 11, "\(JPN\) Tracking Additional Appointments \(Kenmu\)," page 285](#)

[Chapter 6, "Hiring Your Workforce," \(JPN\) Assigning Internal Employee IDs, page 65](#)

[Chapter 12, "\(JPN\) Tracking Intercompany Transfers \(Shukkou\)," page 299](#)

[Chapter 13, "Updating Workforce Information," page 319](#)

[Chapter 5, "Overview of the Hiring Process," Hiring When You Use the Manage Positions Business Process, page 56](#)

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Understanding Regulatory Regions in PeopleSoft HRMS"

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Understanding PeopleSoft HRMS System Data Regulation"

PeopleSoft 8.8 Payroll for North America PeopleBook, "Processing Retro Pay"

PeopleSoft 8.8 Payroll for North America PeopleBook, "Setting Up the Payroll Process," Defining the Final Check Process

Entering Employee Job Information

Access the Job Information page.

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Hahn,David

Job Information
Find First 1 of 1 Last

Action / Reason: Hire

***Job Code:** B1005 Assistant Controller

Supervisor Level:

***Regular/Temporary:** Regular

Empl Class:

***Regular Shift:** N/A

Standard Hours: 20.00

Work Period: W Weekly

Contract Number: Next Contract Number

▼ Belgium

Entry Date: 06/15/1997

***Full/Part:** Part-Time

***Officer Code:** None

Shift Rate: /

FTE: 1.000000

Combined Std Hours / FTE: 40.00 / 2.000000

Contract Type:

Planned Exit:

☐ End Job Automatically

☐ Cross Border Worker

Job Information page (1 of 4)

▼  Germany	
Function Code: 	☐ Cross Border Worker
▼  Spain	
Soc.Sec. Risk Code: 	
Matricula Number:	Next Matricula Number
Substitution Reasons: ▼	Substitution Emplid: 
Special Labor Relationship: ▼	☐ Partial Subrogation
▼  France	
Hours Type: 	
Paid Hours:	
Paid Work Period: 	
Paid FTE:	☐ Cross Border Worker
▼  Italy	
Hiring Category: ▼	
Type of Part-Time: ▼	Percentage: End Date: 
Equal Opportunities	
Turnover - Action: ▼	Turnover Action Reason: 
Productive Unit: 	

Job Information page (2 of 4)

USA

***FLSA Status:** ***EEO Class:** **Work Day Hours:**

Australia

☐ **Casual Job**

Salary Packaging

☐ **Salary Packaged** **Payroll Tax State:**

Higher Education

Work Sector: **Job Function:**

Annual Contact Hours: **Type of Work Performed:**

Type of Appointment: **Appointment Duration:** **Teaching Weeks:**

Job Classification:

New Zealand

☐ **Casual Job**

Malaysia

Work Day Hours:

Mexico

Worker Type Mex: **Salary Type:**

Week/Reduc: **IMSS Term Dt:**

Location Code:

Job Information page (3 of 4)

Netherlands

Workdays / week:

Brazil

***Contract Salary Type:** ***SEFIP Category:**

Occupation Code: **Alternate Union Code:**

[Job Data](#) [Employment Data](#) [Earnings Distribution](#) [Benefits Program Participation](#)

Job Information page (4 of 4)

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

Job Code

Select a code.

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

Entry Date	When you leave the Job Code field, the system displays the date that the employee was first assigned to this job code.
Planned Exit	Enter the end date for this job, if known. If you don't know the end date initially, you can enter it later. If this job is a <i>Temporary Assignment</i>, and you do not enter a date here, you can run the Temporary Assignment w/out End Date report to identify those assignments that do not have an end date. This date is necessary if you want the system to terminate this job and reactivate any substantive job that may have been put on hold.
End Job Automatically	Select to end the job on the specified date. This stops all related processing for payroll and benefits for this job. You must run the Reactivate/Termination Update process if your organization uses this feature. You can use this feature only if the Automatic Job Termination check box is selected on the Installation Table - Product Specific page.
Regular/Temporary	Indicate whether the employee is a regular or temporary employee.
Full/Part	Indicate whether the employee is full-time or part-time.
	Note. The Manage Base Benefits business process uses the values that you selected in the Regular/Temporary and Full/Part fields to determine eligibility requirements.
	Note. PeopleSoft Payroll for North America uses the full-time or part-time information in conjunction with the holiday schedule. When a holiday falls within a pay period, PeopleSoft Payroll for North America prorates the holiday hours for part-time employees. However, proration is based on the standard hours for the employee, not for the pay group.
Empl Class (employee class)	Provides another method of grouping employees. Examples include <i>Assignee</i>, <i>Expatriate</i>, and <i>Intern</i>. Employee classes are included in the Employee Class Table. To override, access this page in correction mode. The list of values depends on the regulatory region specified on the Work Location page. Note. (GBR) The Northern Ireland Fair Employment Monitoring report (UKNI001) uses the employee class to determine the classification of employees. If your organization submits this report, you must use the required employee classes for the report to work correctly. The employee classes are described in the <i>PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements</i>. Note. (JPN) Select <i>HostICT</i> (Hosting Intercompany Transfer) to flag those employees that are hired on an intercompany transfer basis when your company is the host company.

Officer Code	Identify highly compensated employees for the Non-Discrimination Testing - 401(k)/401(m) report (NDT004). The default value is <i>None</i> .
Regular Shift	If the employee is working shifts, select the appropriate shift. If the employee doesn't work shifts, leave the Shift Rate and Factor fields blank. The default value is <i>N/A</i> (not applicable).
Shift Rate	Set up a modified shift differential for this employee only. To apply a shift differential to a group of employees who work the same shift, enter shift information in the Shift Table in PeopleSoft Payroll for North America. These options are mutually exclusive. You can use only one at a time. Note. Retro Pay functionality in PeopleSoft Payroll for North America is triggered by any employee Shift Rate and Factor change with an effective date that's earlier than or equal to the latest pay end date of a check that has already been paid to the employee.
Standard Hours	The system defaults the standard hours for the employee. Change if required.
Work Period	Select a standard work period, the time period during which employees must complete the standard hours. The system uses the annualization factor of the standard work period in combination with the standard hours to calculate full-time equivalency.
FTE (full-time equivalency)	The percentage of full-time work the employee should normally work in this job. The system calculates this value based on the standard hours entry for this job and the standard work period. However, you can override the system-calculated FTE and enter any value. The system issues a warning if you enter a value that is greater than 1.0.
Duties Type	For jobs where the Action/Reason is <i>Temporary Assignment</i> , you must select the type of duties for the temporary assignment from the Temporary Duties Type Table. You can use this feature only if the Automatic Job Suspension check box is selected on the Installation Table - Product Specific page.
Combined Std Hours/FTE (combined standard hours/full time equivalent)	The total standard hours assigned to the employee for all active jobs combined and the employee's total FTE status for all active jobs combined. For example, if an employee holds two jobs, one as a professor with an FTE of .5 and one as a physician with an FTE of .35, the employee's combined FTE is .85 (.5 + .35). You can't change or delete this information. The system hides these fields if your organization doesn't allow multiple jobs. Note. The combined FTE shown here may be different from the total FTE that is calculated for benefits administration eligibility. Combined FTE on this page is the sum of an employee's individual FTEs from <i>active</i> jobs only.
Contract Number	Select the employee's contract number, if applicable.

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

Contract Type	The contract type that is associated with the contract number that you selected.
Encumbrance Override	Select to override encumbrance processing at the job level when you hire or add a concurrent job for an employee.
(DEU) Germany	
Function Code	Select the appropriate code for the employee.
(ESP) Spain	
Soc. Sec. Risk Code (social security risk code)	The Spanish government requires employers to assign a social security risk code that rates the risk of illness, accident, or death that is connected with each type of job. For example, a coal miner is at higher risk than an office manager. You maintain risk codes on the Soc Sec Risk Code page.
Matricula Number	The Spanish government requires every employee to have a matricula number. Employers use this number to compile a Matricula book that reports workplace statistics to the government. You maintain matricula numbers on the Location Table.
Substitution Reasons	Select the reason you are making a substitution for this employee. The AFI report contains this information.
Substitution Emplid	Enter the ID of the substitute employee. The AFI report contains this information.
Special Labor Relationship	Select to indicate the job is in a profession considered as a special labor relationship. The AFI report contains this information.
Partial Subrogation	Select to indicate the employee is in partial subrogation. The AFI report contains this information.
(FRA) France	
Hours Type	Select the appropriate hours type from the list. Different hours type options affect a worker's compensation and standard hours. This field is for information only. No payroll calculation is based on information in this field.

Hours Type	Description
3 ? 8	Indicates a shift work pattern. For example, in the manufacturing or industrial sector, production can continue around the clock. The production workers are split into three groups with each group working one after the other, 8 hours a day. Periodically the workers shift to another group. Shift workers who were working the 12 p.m. to 8 a.m. shift move to the 8 a.m. to 4 p.m. shift. Because this type of work schedule implies a lot of constraints to an employee's personal life, these workers are often paid a shift bonus.
2 ? 8	A shift work pattern that is similar to the 3 ? 8 option, except that there are two work shifts instead of three.
STA	Work hours follow a regular pattern using the job's standard hours as indicated on the Job Date - Job Information page.
IND	Work hours follow a regular pattern that is different from the company's default standard hours. Indicate the number of hours in the Standard Hours field on the Job Date - Job Information page.

Paid Hours

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

Paid Work Period

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

A: Annual

B: Biweekly

C: Contract

D: Daily

F: Every four weeks

M: Monthly

Q: Quarterly

S: Semimonthly

W: Weekly

Paid FTE

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

(GBR) UK

The following fields appear only if PeopleSoft Global Payroll for the UK is not installed.

Tax Code Enter the employee's tax code for the current tax year.

Tax Basis Select the basis used to calculate the employee's tax.

(ITA) Italy

Hiring Category If the employee is hired from a special hiring category, indicate the category here. The options are: *CIG*, *Mobility*, *Protected*, *Unemployed* and *Weak Wrap*.

Type of Part-Time If the employee is part-time, indicate the type. The options are: *Cyclic* (employed only for a certain period of the year, either full or reduced hours) , *Horizontal* (employed five days per week with fewer than full-time hours) and *Vertical* (employed full-time on certain days but less than 40 hours per week).

Percentage Define the percentage of part-time.

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

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

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

(USA) USA

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

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

EEO Class (Equal Employment Opportunity class) The system assigns a regulatory status for this job based on the job code that you assigned the employee.

Work Day Hours Enter the workday hours.

(AUS) Australia

Casual Job Select to indicate employment in a casual job.

(AUS) Salary Packaging

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

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

(AUS) Higher Education

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

Annual Contact Hours Enter the calculated annual contact hours for this employee.

Type of Appointment and Appointment Duration Select the type of appointment. If you select *Limited*, enter an appointment duration.

Teaching Weeks Enter the number of teaching weeks for this employee.

(NZL) New Zealand

Casual Job Select to indicate employment in a casual job.

(MYS) Malaysia

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

(MEX) Mexico

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

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

Worker Type Mex Define the employee's worker type. Values are *Construction Eventual*, *Eventual Worker*, and *Permanent Worker*. This field is used for reporting the type of worker to the SUA.

Salary Type Select the salary type that the employee receives. Values are *All Salaries*, *Fixed Salary*, *Mixed Salary*, and *Variable Salary*. This field is used for reporting to the IMSS.

Week/Reduc (reduced weekly schedule) Specify the reduced work schedule for the employee. Values are *1 Day per Week*, *2 Days per Week*, *3 Days per Week*, *4 Days per Week*, *5 Days per Week*, *Complete Week*, and *Workday Less than 8 Hours*.

IMSS Term Dt (IMSS termination date) Enter the IMSS termination date.

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

(NLD) Netherlands

Workdays / week

Enter the average number of working days per week for employees to ensure that the correct social security premiums are calculated in PeopleSoft Global Payroll for The Netherlands. The default value is 5, reflecting a full-time job. Enter 0 for standby employees who are only working on demand.

You receive a warning if the number of working days is inconsistent with the full/part time parameter.

(BRA) Brazil

Contract Salary Type

Enter the contractual salary code for RAIS.

SEFIP Category

Select the employee category for SEFIP.

Occupation Code

Enter an occupation code based on the Brazilian Code of Occupation (CBO). Leave this field blank if the CBO associated with the position code is valid.

Note. Go to www.mte.gov.br to view a list of CBOs.

Alternate Union Code

Enter the union code that details how to calculate and pay the employee's *monthly* union dues.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Track Faculty Events, “(AUS) Reporting DETYA for the Australian Higher Education Sector”

PeopleSoft 8.8 Global Payroll PeopleBook, “Introducing PeopleSoft Global Payroll”

Chapter 4, “Setting Up Country-Specific Tables,” Viewing Risk Codes, page 39

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Using Frequencies”

Entering National Labor Agreement Data

Access the Job Labor page.

Work Location	Job Information	Job Labor	Payroll	Salary Plan	Compensation
McKinley, Larry J		Employee	EmplID: KU0112		Empl Rcd#: 1
Labor Information Find First 1 of 1 Last					
Effective Date:	08/15/1999	Effective Sequence:	0	Job Indicator:	Secondary Job
Action / Reason:	Hire	Current			
Labor Agreement Entry Dt:	06/20/2000				
Labor Agreement:		Category:			
Employee Subcategory:					
Employee Subcategory 2:					
Union Code:					
Works Council ID:					
▼ Canada					
Union Seniority Date:		☐ Pay Union Fee			
Bargaining Unit:		☐ Position Management Record			

Job Labor page (1 of 3)

▼  **Germany**

Tariff:
 Tariff Area: 
 Performance Group:
 Labor Type:

▼  **Spain**

Union Membership/Representative Data

Union Date: 
 Wrks.Cncl.Funct: InterCtr.Works Cncl Function:
☐ Pay Union Fee Union Fee Amt.: 
 Fee Start Dt:  Fee End Dt: 
☐ Exempted Hrs/Month:

▼  **France**

Labor Agreement:
 Employee Category: Rate:

▼  **Italy**

Union Date: 
 Union Position:
 Participation:

Job Labor page (2 of 3)

▼  **USA**

Union Seniority Date:  ☐ Position Management Record
 Bargaining Unit:
☐ Pay Union Fee

▼  **Mexico**

☐ Pay Union Fee

▼  **India**

Union Membership Details

*Membership Status:
 Member Category: Position Held:
 Comment:

Job Data [Employment Data](#) [Earnings Distribution](#) [Benefits Program Participation](#)

Job Labor page (3 of 3)

Labor Agreement Entry Dt (labor agreement entry date)	If this employee is part of a national labor agreement, enter the date that the employee entered the category or subcategory. Also use this date to track the employee's seniority within the category.
Labor Agreement	Specify which labor agreement applies to this employee.
Category	Specify which employee category the employee belongs to under the labor agreement.
Employee Subcategory	If the employee category that you selected for this person contains subcategories, this field appears. Select the subcategory that applies to the employee.
Employee Subcategory 2	If the subcategory that you selected for this person contains secondary subcategories, this field appears. Select the secondary subcategory that applies to this employee.
Union Code	If the employee belongs to a union, enter the code.
(CAN) Canada	
Union Seniority Date	Enter the date that the employee entered the union.
Pay Union Fee	Select if a union fee should be paid. Your organization can define whether the employee or the employer should pay the fee. This check box doesn't affect system processing.
Bargaining Unit	Enter the unit.
Position Management Record	The system selects this check box whenever the system has inserted this data by updating the incumbent to reflect user-made changes to the Position Management component.

(DEU) Germany

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

Tariff	A tariff is a labor contract between the union and the employers' association. The default comes from the employee's location listed in the Location Table. You can override this default.
Tariff Area	Tariff areas are usually associated with geographical regions in Germany. The tariff area comes from the employee's location listed in the Location Table. You can override this default.
Labor Type	Specify if a employee is management or nonmanagement. Depending on where this employee belongs, different sets of human resources laws and rules apply. One rule concerns which internal labor committee monitors personnel actions.
Spokesmen Committee ID	If you identify an employee as management in the Labor Type field, then the Spokesmen Committee is responsible for the employee, and this

field appears. The Spokesmen Committee ID for this employee comes from the employee's location in the Location Table.

(ESP) Spain

Union Date	Enter the date that the employee joined the union.
Wrk.Cncl. Funct (works council function)	If the employee is a member of the works council for your organization, select which role. Values are <i>none</i> , <i>Member</i> , <i>President</i> , and <i>Secretary</i> .
InterCtr.Works Cncl Function (intercenter works council function)	Select the role that the employee has in the union group (<i>comite intercentros</i>). Values are <i>Member 1</i> , <i>Member 2</i> , and <i>Member 3</i> .
Pay Union Fee and Union Fee Amt (union fee amount)	Select if the employee pays a fee to the union and enter the amount and frequency of the fee.
Fee Start Dt (fee start date) and Fee End Dt (fee end date)	Enter the first and last dates that the union fee should be paid.
Exempted	Select if this employee is exempt from a certain amount of work duty to handle works council duties.
Hrs/Month (hours each month)	This field appears if you selected the Exempted check box. Enter the number of hours each month that the employee is exempted from regular work to handle works council business.

(FRA) France

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

(ITA) Italy

Use this section to enter the union membership details of employees who belong to a union.

Union Date	Enter the date that the employee joined the union.
Union Position	Select the position that the employee holds in the union, if applicable.
Participation	Indicate the employee's level of participation in the union.

(USA) USA

Union Seniority Date	Enter the date that the employee entered the union.
Bargaining Unit	Enter the employee's bargaining unit.

Pay Union Fee	Select if a union fee should be paid. Your organization can define whether the employee or the employer should pay the fee. This check box doesn't affect system processing.
Position Management Record	The system selects this check box whenever the system has inserted this data by updating the incumbent to reflect user-made changes to the Position Management component.
(MEX) Mexico	
Pay Union Fee	Select if the employee pays a union fee.
(IND) India	
Membership Status	Select whether the employee's union membership status is Active or Inactive.
Member Category	Enter the member category. For example, the employee to the staff, officer, or workmen category.
Position Held	Enter the position held by the employee. Some of the members of the union may hold office in the union as President, Vice President, Treasurer, or Secretary and this information is entered here.

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

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

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions, "Managing Position Data"

Entering Employee Payroll Processing Data

Access the Payroll page.

Work Location	Job Information	Job Labor	Payroll	Salary Plan	Compensation

Emmerson, Martin Employee **EmplID:** HU001 **Empl Rcd#:** 0

Payroll Info Find First 1 of 1 Last

Effective Date: 08/27/1996 **Effective Sequence:** 0 **Job Indicator:** Primary Job

Action / Reason: Hire Current

***Payroll System:** Global Payroll

Global Payroll

Pay Group:

Use Pay Group Value

Eligibility Group: ☒

Exchange Rate Type: ☒

Use Rate As Of: ☒

Holiday Schedule: HGR

▼ **Australia**

Balance Group No:

▼ **Hong Kong**

Balance Group No:

Payroll page (1 of 2)

▼ **New Zealand**

Balance Group No:

▼ **Singapore**

Balance Group No:

[Job Data](#) [Employment Data](#) [Benefits Program Participation](#)

Payroll page (2 of 2)

Payroll System

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

(AUS) Australia**Balance Group No** (balance group number)

Balance group numbers identify which Global Payroll accumulator the system should store tax balances in. Tax accumulators are keyed by employee ID, employee record number, pay entity, and balance group number. You use balance group numbers to combine or separate tax balances for multiple jobs (where different tax rates apply) or to separate balances in the case of termination and rehire. There is a balance group ID for each payment summary that is required at the end of the year. There must be an employee tax data record for each balance group ID that the employee has.

(HKG) Hong Kong

Balance Group No (balance group number)

When employees are terminated and subsequently rehired in the same or similar position in the same tax year (using the Job Data component in Workforce Administration), there is a legislative reporting requirement in Hong Kong to keep the periods of employment and earnings balances separate. PeopleSoft Global Payroll uses the balance group number to ensure that the relevant periods of employment and balances of an employee in a tax year are stored separately in terms of payroll data. This enables an employee to have multiple tax balances if the employee is terminated and rehired in the same financial year.

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

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

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

Note. Before entering information for U.S. foreign nationals, use the Substantial Presence Test following this navigation: Workforce Administration, Personal Information, Citizenship, Employee Presence Test USA.

Payroll for North America

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

Pay Group	Select a pay group.
Holiday Schedule	If you defined a holiday schedule in the Pay Group Table, the system displays it here.
Employee Type	The value depends on the pay group. The system completes the field with the default value from the Pay Group Table. If an employee type doesn't exist for this pay group, establish one in the Pay Group Table.
Tipped	Indicate whether this employee will receive tips.
Tax Location Code	Select a tax location code.

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

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

GL Pay Type (general ledger pay type)

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

Account Code

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

See Also

Chapter 10, "Managing Country-Specific Workforce Data," (USA) Determining Foreign Nationals US Residency Status, page 282

PeopleSoft Human Resources PeopleBook: Administer Compensation

PeopleSoft Payroll for North America PeopleBook

Entering Employee Salary Plan Information

Access the Salary Plan page.

Work Location Job Information Job Labor Payroll **Salary Plan** Compensation

Emmerson, Martin Employee EmplID: HU001 Empl Rcd#: 0

Salary Plan Find First 1 of 1 Last

Effective Date: 08/27/1996 Effective Sequence: 0 Job Indicator: Primary Job

Action / Reason: Hire Current

Salary Administration Plan: HXSL Grade: 003 Grade Entry Date: 08/27/1996

Step: Step Entry Date:

Job Data [Employment Data](#) [Earnings Distribution](#) [Benefits Program Participation](#)

Salary Plan page

Salary Administration Plan

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

To use Auto Calculated Premium processing for this employee, select a plan that has Auto Calculated Premium selected and an Absorbing and/or Non-Absorbing Premium Rate Code assigned on the Salary Plan Table. The system displays Auto Calculated Premium-related fields on the Compensation page only if you select an Auto Calculated Premium plan here.

Grade

If you've associated a grade with the employee's job code, the system displays the default value from the Job Code Table.

Grade Entry Date The date that the employee first joined this grade. You can override this value.

Step If you've associated a step with the employee's job code, the system displays the default value from the Job Code Table.

Step Entry Date The date that the employee first joined this step. You can override this value.

Note. The system verifies the combinations of salary administration plans and grades that you've selected.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Understanding PeopleSoft HRMS System Data Regulation"

Entering Employee Compensation Information

Access the Compensation page.

The screenshot shows the 'Compensation' page in PeopleSoft. At the top, there are tabs for 'Work Location', 'Job Information', 'Job Labor', 'Payroll', 'Salary Plan', and 'Compensation'. The employee's name 'Emmerson, Martin' and 'Employee' title are displayed. The 'EmplID' is HU001 and 'Empl Rcd#' is 0. The 'Compensation' section shows 'Effective Date' as 08/27/1996, 'Effective Sequence' as 0, and 'Job Indicator' as Primary Job. The 'Action / Reason' is Hire. The 'Compensation Rate' is 3,200.00 GBP with a frequency of Monthly. Below this is 'Comparative Information' showing a 'Change Amount' of 0.000000 and a 'Compa-Ratio' of 0.98. The 'Pay Rates' section shows 'Annual' and 'Monthly' rates. The 'Pay Components' section shows a table with columns for Rate Code, Seq, Details, Comp Rate, Currency, Frequency, Points, Percent, and Rate Code Group. The first component is NAANNL with a rate of 3,200.000000 GBP Monthly. At the bottom, there are links for 'Job Data', 'Employment Data', 'Earnings Distribution', and 'Benefits Program Participation'.

Compensation page

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

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

Frequency

Select a compensation frequency.

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

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

AutoCalculated Premium

Target Compensation Rate

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

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

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

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

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

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

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

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

Don't Absorb Change

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

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

Comparative Information

Change Amount	The change in the amount of compensation for the rate code.
Change Percent	The percent of change in the compensation for the rate code.
Compa-Ratio (comparison ratio)	The percent-through-range calculation, based on the salary plan and grade and the currency that your organization uses.
Job Ratio	The percent-through-range calculation, based on the midpoint salary of the employee's job code. The job ratio is available only if the employee's job code has job ratio information (midpoint salary, currency, and frequency) defined.

Pay Rates

This group box contains pay rates that are calculated using the default frequencies from the country. You can specify the default frequencies by country on the Default Frequencies page.

See *PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, "Using Frequencies," Setting Country-Specific Frequency Defaults.

Default Pay Components	Click to: • Execute rate code defaults (excluding seniority pay) based on the current values of the designated job fields. • Replace manual updates and old default values with the current default values. • Recalculate the compensation package of affected employees, including the compensation rate, currency, frequency, apply FTE, percent (including current rate code groups), salary points, automatically calculated premium, and so on. • Recalculate compensation-related fields, such as annual amounts or compa-ratio, on the Job Data record. If you don't click this button after updating relevant Job Data fields, the system issues a warning when you attempt to save the new record. If you click OK, the system displays this page, where you can click this button and make any required changes. If you do not click this button, the component package doesn't default until the next time the default component logic is triggered (either when you click the button or through a batch update process).
Contract Change Proration Option	Click to make changes to the employee's contract proration options. Select one of the following options to prorate the earnings change over the remainder of the contract:

No Proration of Change Amt. (no proration of change amount): Select if you do not want the system to prorate the change to the employee's compensation across the contract.

Prorate Over Contract Period: Select to have the system prorate the compensation change over the contract period (determined by the contract start and end dates).

Prorate over Payment Period: Select to have the system prorate the compensation change over the payment period (determined by the payment start and end dates).

Select Lump Sum Retro Payment (lump sum retroactive payment) to enable the system to process a lump sum payment of retroactive earnings to the employee. You must select one of the contract change proration options listed previously to process the lump sum payment.

Calculate Compensation

Click to have the system recalculate the employee's compensation without executing any rate code defaults or replacing any default values. You cannot modify the employee's pay components without recalculating the compensation.

Pay Components – Amounts Tab

Rate Code

Select a rate code. Rate codes are IDs for pay components. The system inserts any compensation information associated with this rate code in the pay components grid.

Note. If a seniority rate code, or group-based rate code, is inserted as a default, the values for these rate codes are display-only; you can't delete them.

Details

Click to access the Comp Rate Code Secondary Panel page and review the description, compensation rate type, and rate code class associated with the rate code.

Comp Rate (compensation rate)

The compensation rate for the pay component.

Frequency

The compensation frequency for the pay component.

Points

The salary points associated with this rate code, if any. Set the points monetary value on the Company Table page. Associate point value (an integer) with rate codes on the Default Compensation and Non-Base Compensation pages, Salary Step Components page, and Compensation page. To use points, select the Salary Points check box on the Installation Table page.

Percent

If the rate type for this rate code is percent, the system displays the percent to be applied to the job compensation rate or to a rate code group (if you are using rate code groups).

Rate Code Group

Select a rate code group. A rate code group enables you to be more specific when calculating percentage-based components as part of your employee compensation package.

Pay Components – Changes Tab

Manually Updated	This flag indicates whether the pay component was manually updated, or the pay component contains only defaulted values.
Change Amount	The overall change amount in this pay component rate.
Change Points	The overall change amount (in points) for this pay component. This field is visible only if Salary Points is selected on the Installation Table page.
Change Percent	The overall change amount for this pay component. This field isn't available for rate codes that have a rate code type of percent or points.

Pay Components – Conversion Tab

Source	Indicates how the pay component got into the pay components grid. 'Manual' indicates that the pay component was added manually. 'Salary Step' indicates that the pay component was defaulted in from the Salary Step. 'Job Code' indicates that the pay component was defaulted in from the Job Code, and so on.
Default without Override	Indicates whether the you can change the default values of the pay component, or the values for this rate code are default values and display-only.
Apply FTE (apply full time equivalent)	Select if you want the value associated with the rate code to be multiplied by the FTE factor for annualization and deannualization. FTE is the percent of full time the employee should normally work in the corresponding job. This field isn't available for rate codes of type percent.
Converted Comp Rate (converted compensation rate)	The converted compensation rate for this pay component. The system converts all base pay components to the currency and compensation frequency you specify.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “(E&G) Administering Contract Pay”

PeopleSoft Human Resources PeopleBook: Administer Compensation

PeopleSoft Human Resources PeopleBook: Manage Base Benefits

Entering Optional Employment-Related Data

Access the Employment Information page.

Employment Information			
Emmerson, Martin		Employee	EmplID: HU001 Empl Rcd#: 0
*Home/Host:	Home		Time Reporter Data
Business Title:			
Work Phone:			
Hire Date:	08/27/1996	Probation Date:	
Termination Date:		Last Date Worked:	
Rehire Date:		Expected Return Date:	
		Years	Months Days
Company Seniority Date:	08/27/1996	6	2 22
Service Date:	08/27/1996	6	2 22
Date Last Increase:			
Last Verification Date:		Professional Experience Date:	

Employment Information page (1 of 4)

Canada									
Security Clearance:									
	☐ Owns 5% (or More) of Company								
Contract Length:	N/A								
Appointment End Date:									
	☐ Accrue Tenure								
	FTE for Tenure Accrual:								
Flex Service Calc Group:					FTE for Flex Service Accrual:				
Statistics Canada Academic Teaching Employment Table Customize Find View All First 1 of 1 Last									
	Teaching Change Date	Survey Report Flag	Duties	*Principal Subject	Teaching Load	FTE	Collapse as FT		
1				99999			☐		

USA									
Security Clearance:									
	☐ Owns 5% (or More) of Company								
Contract Length:	N/A								
Appointment End Date:									
	FTE for Tenure Accrual:								
Flex Service Calc Group:					FTE for Flex Service Accrual:				

Employment Information page (2 of 4)

Singapore	
Ethnic Group: Festive Advance Pay Program: *FA Holiday Type: N/A Festive Advance Eligible From:	Religion:
Malaysia	
Ethnic Group: Festive Advance Pay Program: *FA Holiday Type: N/A Festive Advance Eligible From:	Religion:
Japan	
Educ Lvl - Adjusted Birth Date: Highest Education Level: A A-Not Indicated	Education Level Age Years Months
Belgium	
Official Language: Personnel Registr Nbr:	Preferred Language: *Registration Date: 11/18/2002

Employment Information page (3 of 4)

Netherlands	
Relation to Owner: ☐ Owns 5% (or More) of Company	
Brazil	
INSS Days: INSS Months: INSS Years:	
Job Data Employment Data Earnings Distribution Benefits Program Participation	

Employment Information page (4 of 4)

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

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

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

Home/Host	For employees on assignments, this field specifies whether the current job is at the employee's home location or the assignment location. For a new hire, select Home.
Business Title	Enter the employee's official title, which might be different from the job title. If you're driving part or all of the system by position, the system enters the default title for the position number that you assigned to the employee on the Work Location page.
Work Phone	Track the employee's primary work phone number. You can also update this field using the Manage Positions pages. If you're driving part or all of the system by position, the system enters the default phone number for the position number you assigned to the employee on the Work Location page.
Time Reporter Data	Click to review the PeopleSoft Time and Labor data for this employee. If you aren't using PeopleSoft Time and Labor, this link is unavailable.
Hire Date	The system displays this date after you complete and save the Hire Employee component. This date is the same as the effective date in the Job Data component.
Probation Date	Enter the date that the employee was placed on probation.
Termination Date	The employee's termination date, if applicable.
Last Date Worked	If at a later date you change the status of an employee's employment, depending on the administrative action you select in the Job Data component, the system displays the rehire date, termination date, or date last worked. Also, depending on the administrative action you take, you can enter the expected return date and probation date. The system displays the day before the termination effective date as the termination date and the date last worked. If you rehire the employee, the system resets these fields to blank. When an employee returns from leave, the system resets only the Date Last Worked field to blank.
Company Seniority Date	Based on the date that you enter here, the system calculates the number of years, months, and days of seniority for an employee.
Service Date	Based on the date you enter here, the system calculates the total years, months, and days of service for an employee, including any credit for military leave or the total amount of time that the employee has worked for multiple companies in your organization.
Date Last Increase	When you change an employee's compensation rate, change amount, or change percent data on the Job Data - Compensation page, the system populates this field with the effective date of this change.

Last Verification Date The latest date when the employee verified his or her personal data in the system.

Professional Experience Date The earliest date that the employee started working in a job that required skills that are directly related to the employee's current position.

Hire and Rehire Dates

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

Example

1. Hired January 10, 2000.
2. Terminated December 31, 2000.
3. Hired (3a) or Rehired (3b) January 11, 2001.

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

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

(CAN) Statistics Canada Academic Teaching Employment Table

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

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

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

Survey Report Flag	The Report Flag field value, as specified on the Job Code Table - Job Code Profile Page. If the value is N/A, this employee record isn't reported in academic teaching surveys. You can override this default value.
Duties	The duties value, as specified on the Job Code Table - Job Code Profile Page. You can override this default.
Principal Subject	Select the principal subject that is taught by the employee.
Teaching Load	Enter the employee's teaching load during the academic teaching employment. For example, if the employee is teaching three full courses, enter <i>3.0</i> . If the employee is teaching one full course and one-third of another, enter <i>1.33</i> .
FTTE (full-time teaching equivalency)	Enter the ratio of the teaching load to the full-time teaching equivalency. For example, if teaching four courses constitutes full time and the employee is teaching three courses, enter <i>.75</i> .
Collapse as FT (collapse as full time)	Select if the employment can be collapsed into the reportable full-time job for the purpose of consolidating salary amounts from jobs that make up a full-time job. Use this field only: • If the employee has two or more part-time jobs in different departments that function as a single full-time job. • If the employee receives an administrative stipend under another employee record number that doesn't accrue benefits but counts toward the employee's full-time salary. Don't collapse reportable part-time jobs into a reportable full-time job (the system won't report on the part-time job). Instead, if you use this field, set up a separate employee record for part-time jobs.

(SGP) Singapore and (MYS) Malaysia

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

Ethnic Group and Religion	The values that appear here are the values that you entered on the Personal Data - Identity/Diversity page.
Festive Advance Pay Program	The default value is from the Job Code Table - Job Code Profile page. You can change this default.
FA Holiday Type (festive advance holiday type)	Select a Festive Advance Type from the list. Values are <i>Chinese New Year</i>, <i>Christmas</i>, <i>Deepavali</i>, <i>Hari Raya</i>, and <i>N/A</i>. The default value is the festive holiday that is appropriate to the ethnicity or religion that you entered for this employee on the Personal Data - Identity/Diversity page. You can change this selection. If an employee chooses not to receive a festive advance, select <i>N/A</i>.

Festive Advance Eligible From

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

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

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

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

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

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

Education Level Age Years Months

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

(BEL) Belgium

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

Personnel Registr Nbr (personnel registration number)

Enter the number under which the employee is registered in the personnel register.

(NLD) Netherlands**Relation to Owner**

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

(BRA) Brazil**INSS Days, INSS Months, and INSS Years** (Instituto Nacional de Seguridade Social days, months and years)

Enter the number of days, months, and years that the employee has made social security contributions before being hired by the company.

See Also

[Chapter 6, “Hiring Your Workforce,” Establishing Work Eligibility and Diversity, page 77](#)

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Setting Up Jobs,” Defining Job Function Codes

PeopleSoft 8.8 Human Resources PeopleBook: Administer Festive Advance, “Managing Festive Advances”

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Setting Up Core Human Resources Base Benefits Tables”

PeopleSoft 8.8 Human Resources PeopleBook: Track Global Assignments, “Setting Up Global Assignments”

PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions, “Setting Up Positions”

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Working With Multiple Jobs”

PeopleSoft 8.8 Human Resources PeopleBook: Track Faculty Events, “(CAN) Working with the Statistics Canada Academic Teaching Surveys Process”

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Setting Up Local Country Functionality,” Setting Up the Education Level Age Table

PeopleSoft 8.8 Time and Labor PeopleBook, “Setting Up Basic Tables”

Distributing Job Earnings

Access the Job Earnings Distribution page.

Job Earnings Distribution									
Emmerson,Martin		Employee		EmplID: HU001		Empl Rcd#: 0			
Earnings Distribution Type Find First 1 of 1 Last									
Effective Date: 08/27/1996		Effective Sequence: 0		Job Indicator: Primary Job					
Action / Reason: Hire		Current							
Standard Hours: 40.00		Work Period: W Weekly							
Compensation Rate: 3,200.00 GBP		Comp Freq: M Monthly							
*Earnings Distribution Type: By Percent									
Job Earnings Distribution Find First 1 of 1 Last									
Position	Unit	Department	Job Code	Shift	*Earn Code				
	HG1BU			N/A	REG Regular				
GL Pay Type	Account Code	Compensation Rate		Std Hrs	Distrb %				

[Job Data](#) [Employment Data](#) Earnings Distribution [Benefits Program Participation](#)

Job Earnings Distribution page

Review these guidelines prior to entering data on the Job Earnings Distribution page:

- Skip this page if you don't need to distribute standard earnings for the employee.

PeopleSoft Payroll for North America uses the department, job code, account, shift, position number, and general ledger type that you entered on the Work Information and Payroll pages to calculate pay earnings records.

- The system hides this page when *all* job rows in the component use PeopleSoft Global Payroll.

However, if any job row has another payroll system (for example, PeopleSoft Payroll for North America or Payroll Interface), then the system displays the page.

- *Don't* use this page to distribute special earnings, such as holiday pay or bonuses; instead, use the processes in PeopleSoft Payroll for North America for handling special earnings.
- If you enter a parameter such as Department on this page, the parameter overrides the same field on the Job record.

If you leave a parameter blank, the system uses the field from the Job record.

Earnings Distribution Type Select from the following:

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

Note. You must select *None* if you want the system to use the proration rule you select on the Pay Group Table – Paysheets page when prorating partial pay.

See “Setting Up Pay Groups,” Understanding Proration Rules

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

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

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

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

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

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

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

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

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

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

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

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

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

Paying Employees on Disability

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

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

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

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

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

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “Defining Earnings Codes and Earnings Programs”

Specifying Benefit Program Enrollment

Access the Benefit Program Participation page.

Benefit Program Participation

Emmerson,MartinEmployeeEmplID: HU001Empl Rcd#: 0

Benefit Record Number: 0Deductions Taken: NoOverrideDeduction Subset ID:

Benefit Status

Effective Date: 08/27/1996Effective Sequence: 0

Action / Reason: Hire

Current

*Benefits System: Base BenefitsBenefits Employee Status: Active

Annual Benefits Base Rate: GBP

Benefits Administration Eligibility

BAS Group ID:

Elig Fld 1:

Elig Fld 2:

Elig Fld 3:

Elig Fld 4:

Elig Fld 5:

Elig Fld 6:

Elig Fld 7:

Elig Fld 8:

Elig Fld 9:

Benefit Program Participation

*Effective Date: 08/27/1996*Benefit Program: HR5Global Manual Base Benefit PlnCurrency Code: USD

Job DataEmployment DataEarnings DistributionBenefits Program Participation

Benefit Program Participation page

Benefit Record Number

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

Benefits Administration Eligibility

Elig Field 1-9 (eligibility configuration fields 1–9)

Enter values to further filter employees’ eligibility for a specific benefit. These are client-definable fields.

Benefit Program Participation

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

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Setting Up Core Human Resources Base Benefits Tables”

Adding Nonemployees

The Hire Employee component is the most common component that you use to hire employees, but it's not the only component. You can also use the Add Non-Employee component in the Workforce Administration, Increase Workforce menu.

This section provides an overview of the add nonemployee process and discusses:

- Fields that are unique to the add nonemployee process.
- Setting up nonemployee security.

See Also

Chapter 5, “Overview of the Hiring Process,” page 53

Understanding the Add Nonemployee Process

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

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

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

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

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

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

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Managing COBRA,”
Entering COBRA Elections and Waivers

PeopleSoft 8.8 Human Resources PeopleBook: Monitor Health and Safety, “Tracking Personal
Data for People Involved in Incidents,” Entering Non-Employee Data

Fields That Are Unique to the Add Nonemployee Process

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

Page Name	Add Non-Employee Fields	Description
All Add Non-Employee pages	Status: Non-Employee	This display-only field appears at the top of each page in the Add Non-Employee process.

Page Name	Add Non-Employee Fields	Description
Personal History	Per Type (personnel type)	Use this field to specify the type of nonemployee: <i>GP Dep/Ben</i> (Global Payroll dependent/beneficiary). Select this value only if your payroll system is PeopleSoft Global Payroll. <i>Independnt</i> (independent contractor) <i>Leased Wrk</i> (leased worker) <i>Non HR EE</i> (non-HR administered employee) <i>Stock NEE</i> (stock nonemployee) <i>Suc Candid</i> (succession candidate) <i>TempWorker</i> (temporary worker) <i>TLContractr</i> (time and labor contractor) <i>Training</i> (training nonemployee) <i>Prehire</i> <i>Other Non-Employee</i> Note. You can't use the Add Non-Employee process to add a pension payee or COBRA participant, even though they appear in the available options.
Identity/Diversity	Referral Source Employee Referral ID Specific Referral Source	Enter and track employee referral details.
Work Location	Action	The system fills in the default value <i>Add</i> . You can't change this value while you're using the Add Non-Employee process.
	Department	You must enter a department. If you added a dummy department code for nonemployees to the security tree, enter your nonemployee department here and use it to locate this employee's record during security searches.

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

See Also

Chapter 8, "Entering Additional Data in Human Resources Records," Tracking Disabilities, page 197

Setting Up Nonemployee Security

To set up nonemployee security:

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

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

Defining a Nonemployee Provider

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

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

Page Used to Define a Nonemployee Provider

Page Name	Object Name	Navigation	Usage
Provider Info (provider information)	NEE_PROVIDER_TBL	Set Up HRMS, Product Related, Workforce Administration, Non-Employee Provider	Define the provider, agency, or employer of a nonemployee.

Adding Job Applicants

The Hire Employee component is the most common component that you use to hire employees, but it's not the only component. You can also use the Hire component and Hire USF component in the Recruiting, Hire Applicants menu, which are designed especially for hiring job applicants. When you use this component to hire an applicant, the information you've already entered in the system becomes part of the employee's record.

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

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

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

Adding Concurrent Jobs

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

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

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

Note. (USF) Use the Concurrent Hire USF component instead of the Assign Additional Job component.

This section discusses how to:

- Set up multiple jobs.
- Work with multiple employment record numbers.
- Work with multiple benefit record numbers.
- Enter a concurrent job.

Setting Up Multiple Jobs

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

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

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Working With Multiple Jobs”

Working With Multiple Employment Record Numbers

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

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

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

Job	Employment Record Number
1	0
2	1
3	2

Working With Multiple Benefit Record Numbers

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

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

Apply Job 1's Benefits to All Jobs

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

Apply Job 3's Benefits to All Jobs

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

Apply Separate Benefits to Each Job

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

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

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

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

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

Entering a Concurrent Job

To add a concurrent job for an employee:

1. Open the Assign Additional Job component in the Workforce Administration menu.
2. Enter the employee's ID in the EmplID field.
3. The system assigns this job a new employment record number.

The default number is the highest existing employment record number for that employee, plus 1. For example, if the employee's highest existing employment record number is 2, the system assigns 3 as the new job employment record.

4. Complete the pages in the component as needed for the new job.

See Also

[Chapter 8, "Entering Additional Data in Human Resources Records," Entering Temporary Assignments, page 194](#)

(BRA) Running Brazil Employment Reports

This section provides an overview of the CAGED report and employee registration and discusses how to:

- Generate CAGED reports.
- Generate employee registry reports

Understanding the CAGED Report

The *Cadastro Geral de Empregados e Desempregados* – CAGED (General Register of Employed and Unemployed Individuals) is a permanent register of employee hirings and dismissals. Every establishment that has had any type of turnover (hiring, dismissing, or transferring employee that have employment contracts ruled by the Consolidated Labor Laws) is required to report that turnover to the Ministry of Labor and Employment.

The CAGED report generates a file containing the monthly turnover of employees by establishment.

Understanding Employee Registration

Employee registration provides evidence of length of service and length of social security contribution and proves the relationship between employee and employer. This information affects social security pensions. Companies must record their employees' data in books or cards.

The employee registry report generates a flat file containing information about the employee's employment data (hire date, retirement date) and contributions. The flat file should be kept as part of your records.

Pages Used to Run Brazil Employment Reports

Page Name	Object Name	Navigation	Usage
CAGED File/Report	CAGED_RC_BRA	Workforce Monitoring, Meet Regulatory Rqmts BRA, CAGED File/Report BRA	Generate CAGED reports.
Employee Registry	EMPL_REG_RC_BRA	Workforce Monitoring, Meet Regulatory Rqmts BRA, Employee Registry Report BRA	Generate employee registry reports.

Generating CAGED Reports

Access the CAGED File/Report page.

CAGED File/Report

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) **Run**

Language: English

CAGED Report

Establishment ID: KRC1-1 Matriz São Paulo

Period **Media Type**

Year: 2002 Month: 07 ☒ Diskette ☐ Tape ☐ Other

☐ ACERTO File ☐ First Declaration

Additional Compensation Elem.

Customize Find View All		First	1 of 1	Last
1	LIC REMUNER			

CAGED File/Report page

- Media Type** Indicate how you are sending the file to CAGED: *Diskette* (floppy disk), *Tape* (magnetic tape or cartridge), or *Other*.
- ACERTO File** Select to generate an ACERTO (rightness) file. You generate an ACERTO file to send corrections to a previously sent file; it contains the same information as CAGED.
- First Declaration** Select to indicate this is the first statement the establishment is sending to CAGED.
- Additional Compensation Elem.** (additional compensation elements) If you use PeopleSoft Global Payroll, enter earning components other than salary to report to CAGED.

Run the BRCGED01 process to generate the CAGED report.

Generating Employee Registry Reports

Access the Employee Registry page.

Employee Registry

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English

Employee Registry Report

Establishment ID: KRC1-1 Matriz São Paulo

Pay Group: KR GP HOR Pagamento de Horista

Department:

EmplID:

Additional Compensation Elem.

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

	Earnings		
1		+	-

Action Reason Detail

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

	*Action	Action Reason	Description	*Action Type		
1	Hire	NPS	New Position	Transference	+	-

Employee Registry page

Pay Group, Department, and EmplID

Use these fields to restrict the number of employees for whom you generate an employee registry report. Leave these fields blank to run the report for all of the establishment's eligible employees.

Additional Compensation Elem. (additional compensation elements)

If you use PeopleSoft Global Payroll, you can include payroll information in this report. Enter earning components other than salary to include in this report.

Action

Enter an action reason to generate employee registry reports only for employees with the specified action reason.

Run the BREREG01 process to generate the Employee Registry Report.

(CAN) Running the Canadian Hire List Report

This section discusses how to generate the Canadian Hire List report.

Page Used to Run the Hire List Report

Page Name	Object Name	Navigation	Usage
Hire List	RUNCTL_FROMTHRU	Workforce Administration, Increase Workforce, Hire Report CAN	Run the CAN Hire List report (PER100CN). This produces a hire list that provides information on social insurance numbers, effective dates, and badge/payroll numbers within the date range provided.

CHAPTER 7

(USF) Hiring Employees

This chapter lists common elements and discusses how to:

- Use the personnel action request (PAR) process to hire employees.
- Enter education information.
- Assign employees to positions.
- Hire job applicants.
- Add concurrent jobs.
- Print appointment affidavits and preliminary employment data forms.

Common Elements Used in This Chapter

Transaction#/Sequence	Set by default to <i>1/1</i> — the correct numbers for new employees. Your agency can use these numbers to track both the individual transactions for this employee and the multiple administrative actions that occur on the same day. This field controls the order in which actions are processed internally and the order in which they are output across interfaces. After you save a request, the system automatically increments it by one for each new action effective on the same day. If human resources personnel perform a correction of the original hire request, the correction's assigned value is <i>1/2</i> (<i>1</i> is the transaction number for this particular action for this employee on this day and <i>2</i> is the sequence number for any correction of this action for this employee on this day).
NOA Code (nature of action code)	The reasons for a hire action request.
PAR Status	References the status of this request within the PAR request/approval process. On the Data Control page, this field is set by default to <i>Processed by HR</i>, which is the correct choice for new employees. The value that remains after you leave this page is the default value on other pages within the component.
OK	Click to close this page.

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

This section provides an overview of how to hire employees using the PAR process and discusses how to:

- Enter information for the hiring process.
- Define award setup.
- Enter PAR remarks.
- Enter job tracking information.
- Enter employee personal information.
- Enter birth information.
- Enter address information.
- Enter veteran information.
- Enter marital information.
- Enter education details.
- Enter job information.
- Specify benefit programs.
- Enter retirement data.
- Track information for employees on assignment.
- Enter position information.
- Enter employee compensation information.
- Enter additional compensation information.
- View pay rate and compensation calculations.
- View job earnings distributions.
- Enter current and historical employment information.
- Enter expiration dates.
- Enter appointment limits.
- Enter additional employment information.
- Track nonpay status information.
- Enter time reporting data.
- Enter employee security and financial disclosure information.

Understanding the Personnel Action Request Process to Hire Employees

The PAR process depends on seven common pages that store specific information required for the PAR hiring process and contain links to supplemental pages that provide further details for the information entered on the primary page. To accommodate the different steps in the PAR process, there are eleven components that contain these seven common pages. The object names of the seven common pages are the same in all of the components. The following table lists the eleven components.

Component	Navigation Path	When to Use
Hire Employee	Workforce Administration, Increase Workforce, Hire Employee USF	Initially hiring employees.
Concurrent Hire	Workforce Administration, Job Information, Concurrent Hire USF	See Chapter 6, “Hiring Your Workforce,” Adding Concurrent Jobs, page 129.
Hire	Recruiting, Hire Applicants, Hire USF	See Chapter 6, “Hiring Your Workforce,” Adding Job Applicants, page 129.
Employee Request	Workforce Administration, Job Information, Employee Request USF	See Chapter 15, “(USF) Administering Personnel Action Requests,” Tracking and Routing a PAR Through Reviews and Completion, page 373.
Supervisor Request	Workforce Administration, Job Information, Supervisor Request USF	See Chapter 15, “(USF) Administering Personnel Action Requests,” Tracking and Routing a PAR Through Reviews and Completion, page 373.
HR Request	Workforce Administration, Job Information, HR Request USF	See Chapter 15, “(USF) Administering Personnel Action Requests,” Human Resources Processing of Personnel Actions, page 380.
1st Rqst Authorization	Workforce Administration, Job Information, 1st Rqst Authorization USF	See Chapter 15, “(USF) Administering Personnel Action Requests,” Authorizing and Approving Personnel Actions, page 379.

Component	Navigation Path	When to Use
2nd Rqst Authorization	Workforce Administration, Job Information, 2nd Rqst Authorization USF	See Chapter 15, “(USF) Administering Personnel Action Requests,” Authorizing and Approving Personnel Actions, page 379.
Approve Request	Workforce Administration, Job Information, Approve Request USF	See Chapter 15, “(USF) Administering Personnel Action Requests,” Authorizing and Approving Personnel Actions, page 379.
Cancel Personnel Action	Workforce Administration, Job Information, Cancel Personnel Action USF	See Chapter 15, “(USF) Administering Personnel Action Requests,” Canceling or Correcting a Personnel Action Request, page 380.
Correct Personnel Action	Workforce Administration, Job Information, Correct Personnel Action USF	See Chapter 15, “(USF) Administering Personnel Action Requests,” Canceling or Correcting a Personnel Action Request, page 380.

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

See Also

[Chapter 15, “\(USF\) Administering Personnel Action Requests,” page 371](#)

Pages Used to Hire Employees

Page Name	Object Name	Navigation	Usage
Data Control	GVT_JOB0	Workforce Administration, Increase Workforce, Hire Employee USF, Data Control	Enter information for the hiring process, such as the NOA code, approving authorities, PAR remarks, and tracking information.
Award Data	GVT_AWD_DATA	Click Award Data on the Supervisor Request - Data Control or HR Request - Data Control pages.	Define the award setup in the Supervisor Request - Data Control page.
PAR Remarks	GVT_PAR_PROCESS_RK	Click PAR Remarks on the Data Control page.	Enter comments specific to this position or employee situation.

Page Name	Object Name	Navigation	Usage
Job Tracking Info	GVT_EE_CNTRL_SEC	Click Tracking Data on the Data Control page.	View or enter job-tracking information.
Personal Data	GVT_PERS_DATA1	Workforce Administration, Increase Workforce, Hire Employee USF, Personal Data	Enter the employee's personal information, such as name, address, birthplace, education, military service, citizenship, veteran, marital status, race or origin, and handicap.
Addl Birth Info (additional birth information)	GVT_BRTHINF_SEC	Click Additional Birth Info on the Personal Data page.	Enter birth information.
Address Information	GVT_ADDRINF_SEC	Click Mailing Address on the Personal Data page.	Enter home and mailing address information.
Personal Phone Numbers	GVT_PERS_PH_SEC	Click Personal Phone Numbers on the Personal Data page.	Enter employee phone, fax, cellular, and other numbers.
Veterans Info	GVT_VETINF_SEC	Click Veterans Info on the Personal Data page.	Enter veteran information.
Marital Status	GVT_MARITAL_SEC	Click Marital Info on the Personal Data page.	Enter marital information.
Education Details	GVT_EDUCINF_SEC	Click Education Details on the Personal Data page.	Enter education details.
Job	GVT_JOB1	Workforce Administration, Increase Workforce, Hire Employee USF, Job	Enter job information, including the employee's job, agency, and department.
Benefits/FEHB Data	GVT_BENDATA_SEC	Click Benefits/FEHB Data on the Job page.	Specify benefit programs in which the employee is enrolled in PeopleSoft Human Resources or in PeopleSoft Benefits Administration.
FEGLI/Retirement/FICA (Federal Employees Group Life Insurance / Retirement / Federal Insurance Contributions Act)	GVT_BENDATA1_SEC	Click FEGLI/Retirement/FICA on the Job page.	Enter retirement data.
Departmental Hierarchy	GVT_DEPTINF_SEC	Click Departmental Hierarchy on the Job page.	View departmental hierarchy for the position.
Detail Assignment	GVT_DETAIL_SEC	Click Detail on the Job page.	Track information for employees on assignment. You probably won't use this page when first hiring an employee.
Position	GVT_JOB2	Workforce Administration, Increase Workforce, Hire Employee USF, Position	Enter position information like employee type, class, position type, shift, and pay group.

Page Name	Object Name	Navigation	Usage
Compensation	GVT_JOB3	Workforce Administration, Increase Workforce, Hire Employee USF, Compensation	Enter employee compensation information, including pay rate and basis, pay plan/table/grade, frequency, quoted and other pay.
Other Pay Information	GVT_OTH_PAY_SEC	Click Other Pay Information on the Compensation page.	Enter compensation that employees receive that's in addition to base pay.
Expected Pay	GVT_LOC_PAY_SEC	Click Expected Pay on the Compensation page.	View the various pay rate and compensation calculations the system calculates and displays based on the Base Pay and Comp Frequency you enter on the Compensation page.
Accounting Information	GVT_JOBDIST_SEC	Click Accounting Info on the Compensation page.	View a summary of the employee's job earnings distribution.
Employment 1	GVT_EMPLOYMENT1	Workforce Administration, Increase Workforce, Hire Employee USF, Employment 1	Enter current and historical employment information, such as employee service computation and conversion dates, and within-grade-increase data.
Expiration Dates	GVT_EXPIRDT_SEC	Click Exp Dates on the Employment 1 page.	Enter expiration dates for temporary promotions, position changes, sabbaticals, or detail assignments.
Appointment Info	GVT_APPDATA_SEC	Click Appt Data on the Employment 1 page.	Enter appointment limits.
Employment 2	GVT_EMPLOYMENT3	Workforce Administration, Increase Workforce, Hire Employee USF, Employment 2	Enter additional employment data including union, probation, RIF, tenure, and security data. Also record the retained grade and reports to information.
Employment Phone Numbers	GVT_EMPL_PH_SEC	Click Phone Nbrs on the Employment 2 page.	Enter employee phone numbers.
Non Pay Data	GVT_NONPAY_SEC	Click Non Pay Data on the Employment 2 page.	Track information related to a status of non-pay. Information on this page affects FEHB eligibility and FEGLI.
Time and Labor Data	TL_EMPL_DATA_FG_S	Click Time Reporter Data on the Employment 2 page.	Review PeopleSoft Time and Labor data for this employee.
Security Info	GVT_SECURITY_SEC	Click Security Info on the Employment 2 page.	Enter employee security and financial disclosure information.

Entering Information for the Hiring Process

Access the Data Control page.

Data Control | Personal Data | Job | Position | Compensation | Employment 1 | Employment 2

EmplID: NEW Empl Rcd Nbr: 0

Data Control Find | View All First 1 of 1 Last

Actual Effective Date: 11/11/2002

Proposed Effective Date: 11/11/2002

Transaction / Sequence: 1 / 1

Not To Exceed Date: 11/30/2004

***Action:** HIR Hire **PAR Status:** PRO Processed by Human Resources

***Reason Code:** NPS New Position **Contact Emplid:** H0ADHOC117

NOA Code: 100 Career Appt

Authority (1): K1M **Descr (1):** Reg 315.601. Appt based **Descr (1) Part 2:** on svc in Panama.

Authority (2): **Descr (2):** **Descr (2) Part 2:**

PAR Request#: [Print SF-52](#) [Print SF-50](#) [Process Monitor](#) [PAR Remarks](#) [Award Data](#) [Tracking Data](#)

Data Control page

Many of the values you enter on this page become the default source for values on other pages throughout the system. If necessary, you can override most of these default entries when you are working on other pages.

After completing this page, you can print out the Personnel Action Request form or print a notice for this position.

Actual Effective Date	Enter the actual effective date, which is used as the hire action's effective date default value throughout the system. If necessary, change this to reflect the date on which you hired the employee. When working on other pages, the dates are unavailable, so if you need to change the effective date, you do so by returning to the Data Control page.
Proposed Effective Date	This field is populated by default with the date entered in the Actual Effective Date field. Human resources personnel processing a request have final authority on when the action becomes effective, and they will enter the official actual effective date, but the proposed effective date will remain unchanged.
Not to Exceed Date	(Optional) Enter the ending date of a temporary action (for example, the date a temporary hire expires).
Action	The default value is set to <i>Hire</i> , which is the correct value for new employees.
Reason Code	Enter the reason code for this hire, such as new position, temporary assignment, or trainee.

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

Contact EmplID (contact employee ID)	Enter the employee ID of the person to contact with any questions regarding the hire.
Authority (1) and Authority (2)	Select the appropriate authority for this NOA code. This field is usually reserved for use by human resources officials.
PAR Request # (PAR request number)	(Optional) Enter a PAR request number for each employee request after you save this request. This field is for your agency's information only.
PAR Remarks	Click to view or enter comments specific to this position or employee situation.
Award Data	Click to view or enter award information.
Tracking Data	Click to view or enter job-tracking information.

See Also

Chapter 15, “(USF) Administering Personnel Action Requests,” page 371

Defining Award Setup

Access the Supervisor Request - Award Data page.

Award Data

Action: AWD Award - Monetary

Reason Code: Superior Performance

Award Classification: Award

Award Data			
Amount:	500.00	Hours:	
Pay Period Amount:	500.00	Process Until:	

Informational Data			
Award Group:		Use By Date:	
Suggestion Number:		Tangible Benefit:	
Obligation Expiration:		Intangible Benefit:	

Payroll Data			
Account Code:	000000026		
GL Pay Type:	AWARD	☒	Pay in Separate Paycheck?
Amount Paid:	0.00	☐	Gross-Up
Earnings Code:	Bonus	Seq:	

Comment:

OK **Cancel**

Supervisor Request - Award Data page

Amount and Pay Period Amount

Enter the award amount and the amount for the pay period. The pay period amount is set by default to 100 percent of the award amount for most types of awards. Change if necessary.

Hours

Enter the number of hours for a time-off award.

Process Until

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

Award Group

Enter the award group for informational purposes.

Use By Date

Enter the use by date for informational purposes.

GL Pay Type (general ledger pay type)

Enter the payroll data if not defaulted in. The Pay in Separate Paycheck or Gross-Up Pay check boxes are set by default to the values you entered on the Award Action Data Table page.

Amount Paid and Earnings Code

The system sets these fields by default and tracks this information.

See Also

PeopleSoft Payroll for North America PeopleBook

Entering PAR Remarks

Access the PAR Remarks page.

PAR Remarks page

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

Insertion Required If this remark needs employee-specific information, this check box is selected. The default settings for this box are defined with the codes on the PAR Remarks Table page.

Entering Job Tracking Information

Access the Job Tracking Info page.

Job Tracking Info

EmplID: FRG001 **Empl Rcd#:** 0

Effective Date: 11/11/2002 **Current Status:** Processed by Human Resources

Action: Hire **Reason Code:** New Position

Action Taken	Action Dt Ovrld	Status	User ID	Override Operator Emplid	Emplid of Tracking Row	Name	Comment
11/20/2002	☐	Processed	HFG	☐	FRG001	Chandler,Craig	

OK Cancel

Job Tracking Info page

Action Taken	Displays the date this initial action request was entered.
Action Dt Ovrld (action date override)	Select to make the Action Taken field available for entry so that you can change the action date.
Override Operator Emplid (override operator employee ID)	(Optional) Select this check box when an administrative assistant, for example, enters data on behalf of a supervisor.
Emplid of Tracking Row (employee ID of tracking row)	When the Override Operator Emplid check box is selected, this field becomes available for entry. Enter the ID of the person actually performing the data entry.

Entering Employee Personal Information

Access the Personal Data page.

Data Control	Personal Data	Job	Position	Compensation	Employment 1	Employment 2
EmplID: NEW		Empl Rcd#: 0				
Personal Data Find View All First ◀ 1 of 1 ▶ Last + -						
Effective Date: 11/11/2002		Transaction# /Seq 1		PAR Status: Processed by Human Resources		
Act Type: Hire		NOA Code: 100		Empl Status:		
Prefix:		First: Kathleen		Middle: F		
Last: Henderson		Suffix:				
Name: Henderson,Kathleen F						
Gender: ☐ Male ☒ Female		Citizenship Status: 1				
Draft Status: Not Applicable		Ethnic Group: Not Indicated				
*Date of Birth: 11/15/1972		Date of Death:				
Disability Code: 05 No Handicap		Date Entitled to Medicare:				
Additional Birth Info Mailing Address Personal Phone Numbers Veterans Info Marital Info Education Details						
Country: USA		*Type/Description: PR		National ID: 816854587		

Personal Data page

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

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

Gender Indicate the employee's gender.

Citizenship Status Select the appropriate citizenship status.

Draft Status (Optional) Select a draft status.

Ethnic Group Select the employee's ethnic group. Values are based on U.S. federal Equal Employment Opportunity (EEO) ethnic categories. Use ethnic group information to compile the establishment's Affirmative Action (AA) plan and to generate several EEO reports.

Date of Birth	Enter the employee's date of birth. If you do not enter a birth date, a warning message appears when you save the record. Though this field isn't required for the Administering Workforce business process, the system uses the date in some benefit and payroll tasks to calculate an employee's age. If you do not have the birth date currently, after you acknowledge the message, you can continue entering information. However, PeopleSoft recommends that you enter the information later.
Date of Death	Skip this field when hiring a new employee.
Disability Code	Select the disability code from the list, or if none, select the value <i>No Handicap</i> .
Date Entitled to Medicare	(Optional) Enter the date the employee is entitled to Medicare.
Country	Many countries have unique name formats. Select the country with the name format you want to use for this person. When you move out of this field, the system displays the appropriate fields for the country you entered.
Type/Description	Enter the corresponding type/description of the employee's national ID.
Additional Birth Info	Click to access the Addl Birth Info page and enter the employee's birth information.
Address Information	Click to access the Address Information page and enter home and mailing address information.
Personal Phone Numbers	Click to access the Personal Phone Numbers page and enter employee phone, fax, cellular, and other numbers.
Veterans Info (veterans information)	Click to access the Veterans Info page and enter veterans information.
Marital Info (marital information)	Click to access the Marital Status page and enter marital information.
Education Details	Click to access the Education Details page and enter information about the employee's education.

See Also

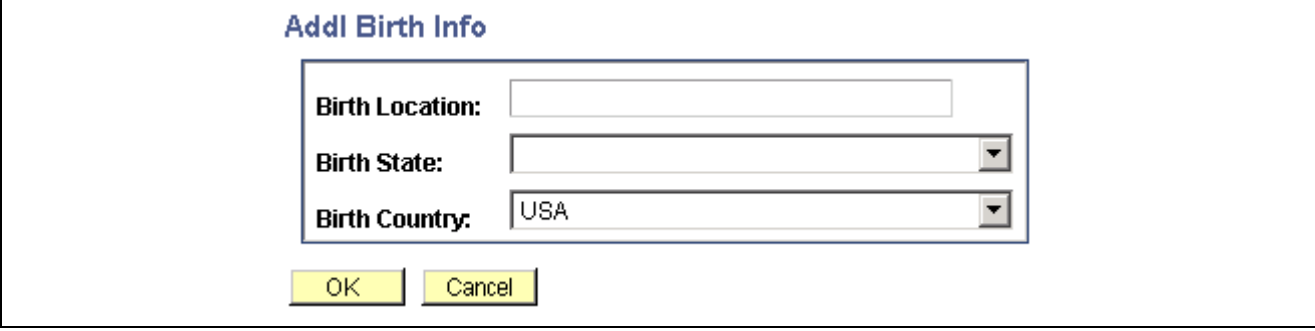
Chapter 16, “(USF) Processing Personnel Action Requests,” Requesting Terminations Due to Death, page 402

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, “(USA) Meeting Regulatory Requirements for the United States”

PeopleSoft Human Resources PeopleBook: Manage Base Benefits

Entering Birth Information

Access the Addl Birth Info page.



Addl Birth Info

Birth Location:

Birth State:

Birth Country:

Addl Birth Info page

Birth Location Enter the name of the city.

Birth State Select the birth state.

Birth Country Select the birth country.

Entering Address Information

Access the Address Information page.

Address Information

Address

Country: USA United States

Address: 897 Calvary Trail Boulevard
Suite 302
Arlington, VA 22040
Fairfax [Edit Address](#)

Mailing Address

Country:

Address: [Edit Address](#)

OK Cancel

Address Information page

Select the country and then click *Edit Address*. Fill out the address fields on the page that appears and click *OK*. The address information appears in the Address field.

See Also

PeopleSoft 8.8 Benefits Administration PeopleBook, “Defining Eligibility Rules”

Entering Veteran Information

Access the Veterans Info page.

Veterans Info

Veterans Preference: None

Veterans Status: Not a Veteran

Uniformed Service:

Military Separation Status: **Military Grade:**

Military Service Start Date: **End Date:**

Reserve Category:

Creditable Military Service:

☐ **Notify Military Pay Center** ☐ **Veterans Preference RIF**

☐ **Military Service Verified** ☐ **Disabled Veteran**

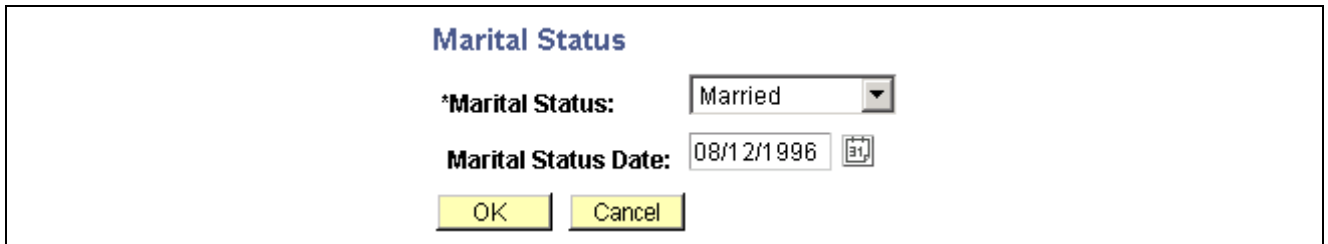
OK **Cancel**

Veterans Info page

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

Entering Marital Information

Access the Marital Status page.



Marital Status

***Marital Status:**

Marital Status Date: 

Marital Status page

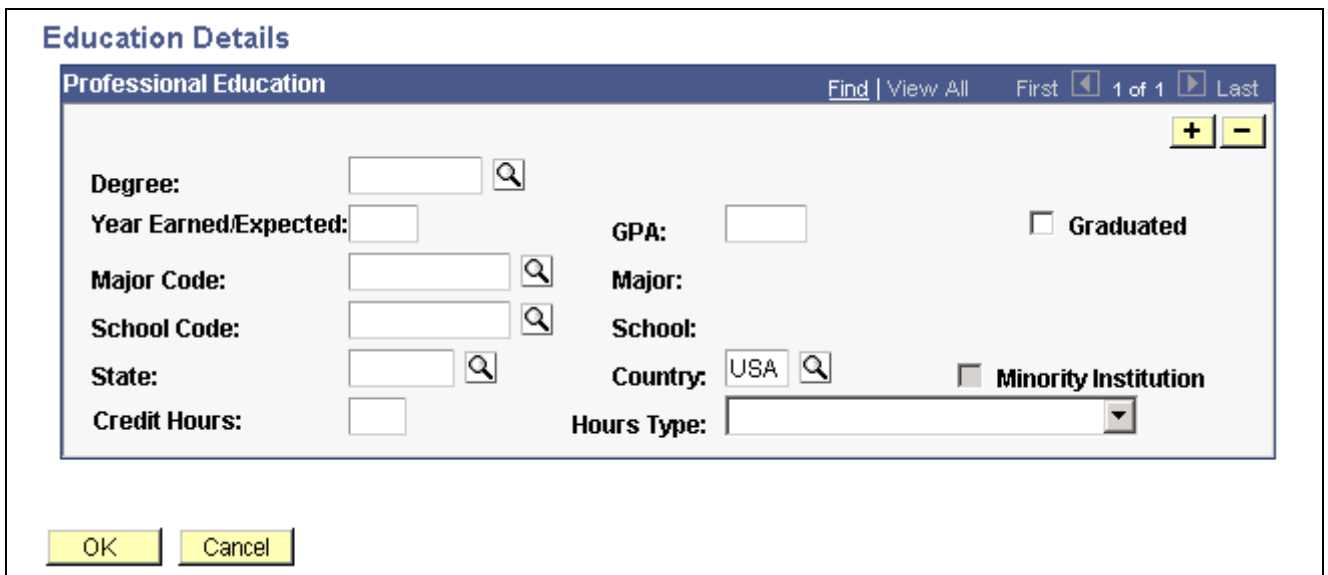
Marital Status Select the person's marital status.

Marital Status Date Enter the date on which this status took effect.

Entering Education Details

Access the Education Details page.

Note. The Education Details page link is active only during the hiring process. To update education information on existing employees use the Professional Education and Training page through the Workforce Development, Competency Management, Track Person Competencies, Education navigation.



Education Details

Professional Education Find | View All First 1 of 1 Last  

Degree: 

Year Earned/Expected: **GPA:** ☐ **Graduated**

Major Code:  **Major:**

School Code:  **School:**

State:  **Country:**  ☐ **Minority Institution**

Credit Hours: **Hours Type:**

Education Details page

Degree Select the degree earned or expected for the employee.

Note. This information must be set up on the Degree Table page in the Set Up HRMS, Common Definitions, School Information menu.

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

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

Graduated Select if the employee has graduated.

Major Code	Select the major code for the degree earned or being earned.
Major	Enter a major if there is not a code for it.
School Code	Select the code designating the school the employee graduated from or currently attends.
School	Enter a school if there is not a code for it.
State	Enter the state where the school is located.
Country	Select the country where the school is located.
Minority Institution	Select if the employee attended or attends a designated minority institution.
Credit Hours	Enter the credit hours earned either upon completion or to this point if not complete.
Hours Type	Select the hours type from these options: <i>Continuing Education, Other Pay, Quarter Hours, and Semester Hours.</i>

Entering Job Information

Access the Job page.

The screenshot displays the 'Job' page within a hiring system. At the top, there are tabs for 'Data Control', 'Personal Data', 'Job', 'Position', 'Compensation', 'Employment 1', and 'Employment 2'. The 'Job' tab is currently selected. Below the tabs, the page shows various fields for entering job information. Key fields include 'Effective Date' (11/11/2002), 'Transaction# /Seq' (1), 'PAR Status' (Processed by Human Resources), 'Act Type' (Hire), 'NOA Code' (100), 'Empl Status', 'Position' (10000003), '*Job Code' (820005), '*Agency' (GBI - Global Business Institute), 'Sub-Agency', 'Transferred From Agency', 'Transferred To Agency', '*Business Unit' (GBIBU - Global Business Institute BU), '*Department' (10500 - Benefits), '*Location' (KUNY00 - Corporation Headquarters), and 'Tax Location'. There are also checkboxes for 'Position Management Record' and 'Position Override', and links for 'Benefits/FEHB Data', 'FEGLI/Retirement/FICA', 'Departmental Hierarchy', and 'Detail'.

Job page

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

Act Type (action type)	Set by default to <i>Hire</i> , which is the correct choice for new employees.
Position	Select a position. When you move out of this field, the system completes position-related fields with default data from the Add/Update Position Info component if the Manage Positions business process is being used.

Job code, agency, subagency, business unit, department, and location all are set by default to position management data.

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

If you've associated agencies with departments on the Department page, the system enters the agency code on the Job page and the field is unavailable for entry. It also enters default values on the Position page for the Pay Periods/Year, Employee Type, Holiday Schedule (which you define in the Pay Group table), and Pay Group fields (which you associate with a position in the Add/Update Position Info component in the Organizational Development, Position Management, Maintain Positions/Budgets menu). On the Position page, the system enters the standard hours that correspond to the job code. If you've associated them with the job code on the Job Code page, the system also enters the pay plan/table/grade, and compensation frequency on the Compensation page. In addition, on the Compensation page, the system enters the grade/step entry (date), which is the date the employee was first assigned to the grade and step. The Position Number, Hire Date, and Position Override fields are discussed in Hiring Employees Into Positions.

Position Management Record

Indicates whether updates to the Position Management record are now reflected here. For hiring, the value is N, as the new hire would not have information to update.

If your organization uses the Manage Positions business process and this position were updated this would be Y. The option then would be to check the Position Override box to make changes to position data that are otherwise locked in by the position data record.

Job Code

If you are not using the Manage Positions business process, enter the job code. Otherwise, the job code is derived from the value established in the Add/Update Position Info component.

Position Override

Select to change any of the position-related fields, such as the Job Code, Department, Agency, and Sub-agency.

PeopleSoft Human Resources issues a warning message if you assign an employee to a position that has already been filled by another employee or if a new employee appointment exceeds the maximum head count for that position.

Note. After you have assigned an employee to a position, you must maintain all employee data manually while the employee is assigned to this position in the system. The system won't update position data automatically for the employee when position information is changed.

Agency, Sub-Agency, Business Unit, Department, and Location

Select the ID types for these fields individually. If the position management hiring process is used, the system enters default values here when the Position ID is selected.

Transferred From Agency	If the reason code entered on the Data Control page was <i>Transfer</i> , select the agency from which the employee is transferring.
Transferred To Agency	This is not a valid field in the hiring process. This field is used primarily in other types of PAR requests. It becomes active based on the action and reason code entered on the Data Control page.
Tax Location	Derived from the department-tax location relationship established on the Department page.

See Also

Chapter 16, “(USF) Processing Personnel Action Requests,” page 391

Chapter 5, “Overview of the Hiring Process,” Hiring When You Use the Manage Positions Business Process, page 56

PeopleSoft 8.8 Payroll Interface PeopleBook, “Setting Up PeopleSoft Payroll Interface”

PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions, “Managing Position Data”

Specifying Benefit Programs

Access the Benefits/FEHB Data page.

Benefits/FEHB Data	
Benefits Control Benefit Record Number: 0 Benefits Employee Status: Active BAS Group ID: LFG Q Full Benefits Group Benefit Program: LFB Q Full Time Employee Benefit Pgm	
FEHB Eligibility ☒ Permanent ☐ Continuing Coverage ☐ Temporary Appointment > 1 yr ☐ Temp Appt < 1yr + FedSvc > 1yr ☐ Not Eligible	Eligibility Elig Fld 1: Elig Fld 2: Elig Fld 3: Elig Fld 4: Elig Fld 5: Elig Fld 6: Elig Fld 7: Elig Fld 8: Elig Fld 9:
FEHB Date FEHB Date: 31	
OK Cancel	

Benefits/FEHB Data page

Benefit Record Number

Benefit record number is used to group several jobs together for benefit purposes. A benefit record number can be assigned to multiple employee record numbers. If the new job entitles the employee to a new set of concurrent benefits, you should use a new benefit record number. If the job does not entitle the employee to new benefits, you should use an existing benefit record number. Each benefit record number must have a designated primary job. The primary job is used to process the benefit information.

BAS Group ID (benefits administration system group ID)

(Optional) Enter a BAS group ID.

Benefit Program

(Optional) Enter a benefit program.

FEHB Eligibility (federal employees health benefits eligibility)

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

FEHB Date (federal employees health benefits date)

Enter the date that the employee is eligible for FEHB.

Elig Fld 1 – 9 (eligibility field 1 - 9)	These fields further define an employee’s benefits eligibility. Each agency determines its own use of these fields. Contact the agency’s Personnel Policy Officials for instruction using these fields.
Benefits System	Select which PeopleSoft Benefits system you are using to administer this employee’s benefits: PeopleSoft Human Resources Manage Base Benefits or Benefits Administration.

Entering Retirement Data

Access the FEGLI/Retirement/FICA page.

FEGLI/Retirement Data/FICA

FEGLI

FEGLI Code:

C0

Basic Only

Post 65 Basic Life Reduction:

☐ Living Benefits

Coverage Amount:

Retirement

Retirement Plan:

K

FERS and FICA

FERS Coverage:

Automatically Covered By FERS

Previous Retirement Coverage:

Never Covered

Annuitant Indicator:

9

Not Applicable

Annuity Commencement Date:

CSRS Frozen Service:

0000

FICA Status-Employee

FICA Status-Employee:

N

Subject

OK

Cancel

FEGLI/Retirement/FICA page

FEGLI

FEGLI Code (federal employees group life insurance code)	Enter the FEGLI code.
Post 65 Basic Life Reduction	Select the employee’s post-65 basic life reduction coverage.
Living Benefits and Coverage Amount	Use these fields only when selecting living benefits (not during the hiring process).

Retirement

Retirement Plan

Select the employee's retirement plan.

In addition to the retirement plans used for submission to Central Personnel Data File (CPDF), PeopleSoft supplies the following codes that you may use for documentation purposes only:

Code	Explanation
7	For foreign national employees exempt from retirement and from social security and Medicare tax deductions.
8	U.S. Court of Veterans Appeals without election of survivor annuity benefits. Code is for use by the judges of the U.S. Court of Veterans Appeals only.
9	U.S. Court of Veterans Appeals with election of survivor annuity benefits. Code is for use by the judges of the U.S. Court of Veterans Appeals only.
A	Article III judges and justices.
B	Bankruptcy judges and justices under the Judicial Retirement System.
S	U.S. Claims Court Judges Retirement System.
V	Clerks/magistrates (CSRS).
U	Bankruptcy judges (full FICA/partial CSRS).
Y	Bankruptcy judges (full FICA/full CSRS).

FERS Coverage (Federal Employees Retirement System coverage)

Select the employee's FERS coverage.

Previous Retirement Coverage

Select the employee's previous retirement coverage.

Annuitant Indicator

Select the employee's annuitant indicator.

Annuity Commencement Date

If the new employee is a reemployed annuitant, enter the annuity commencement date.

CSRS Frozen Service (Civil Service Retirement System frozen service)

Enter the total years and months of civilian and military service that is creditable in a CSRS component of a FERS employee, or, in the case of a CSRS offset employee, the service that would be included in a CSRS component if the employee ever becomes covered by FERS.

FICA Status-Employee

FICA Status-Employee Indicate whether the employee is exempt, subject, or subject to Medicare only.

See Also

Chapter 16, “(USF) Processing Personnel Action Requests,” Requesting Terminations Due to Death, page 402
PeopleSoft Human Resources PeopleBook: Manage Base Benefits

Tracking Information for Employees on Assignment

Access the Detail Assignment page.

Detail Assignment

GVT Detail Position Number:



GVT Detail Bargaining Unit:



GVT Detail Union Code:



OK

Cancel

Detail Assignment page

- GVT Detail Position Number**
(government detail position number)

Select the employee’s detail position number.
- GVT Detail Bargaining Unit**
(government detail bargaining unit)

Select the employee’s detail bargaining unit.
- GVT Detail Union Code**
(government detail union code)

Select the employee’s detail union code.

Entering Position Information

Access the Position page.

Data Control	Personal Data	Job	Position	Compensation	Employment 1	Employment 2
EmplID: NEW Empl Rcd#: 0						
Position Data Find View All First 1 of 1 Last						
Effective Date: 11/11/2002		Transaction# /Seq 1		PAR Status: Processed by Human Resources		
Act Type: Hire		NOA Code: 100		Empl Status:		
LEO Position: Not Applicable		☒ SF-113G Ceiling		*Regular Shift: Not Applicable		
POI:				Shift Rate/Factor:		
*Pay Group: KU2		US Biweekly				
Pay Frequency: BiweeklyB		Work Period: W		Holiday Schedule: KU01		
Earnings Program: KU1						
*Employee Type: H		Hourly				
Employee Classification:						
*Reg/Temp: Regular						
Supervisor Level:						
		Type Appt: Career (Competitive Svc Perm)				
		Posn Occupied:				
		Work Schedule: Full Time		*Job Indicator: Primary		
		*FLSA Status: Nonexempt		☐ Adds to FTE Actual Count		
		*Standard Hours: 40.00		FTE:		

Position page

LEO Position (law enforcement officer position)

If this is a law enforcement officer position, a value appears from the Job Code page.

SF-113G Ceiling

If this position is reportable for the SF-113G ceiling, select this check box.

POI (personnel office identifier)

Set by default from the Add/Update Position Info component or the Job Code page.

Regular Shift

If the employee is working shifts, select the appropriate shift.

Shift Rate/Factor

Define the shift rate/factor only if the shift differential is specified at the employee level.

Pay Group

(Required) A value appears here if you defined one on the Position Data page. Otherwise, select a pay group.

Pay Frequency

Set by default from the Pay Group page.

Work Period

Select the time period in which employees must complete the standard hours. The system uses the annualization factor of the standard work period, in combination with the standard hours, to calculate FTE (full-time equivalency).

Holiday Schedule

If you linked an established holiday schedule on the Pay Group page, it appears here.

Employee Type

Depends on the pay group and is set by default from the Pay Group page. If an employee type doesn't exist for this pay group, establish one on the Pay Group page or enter one here.

Employee Classification

Provides another method of grouping employees.

Reg/Temp (regular/temporary)	Indicate whether the new hire is a regular or temporary employee. The Manage Base Benefits business process of PeopleSoft Human Resources uses this value when determining eligibility requirements.
Supervisor Level	If the employee is in a supervisory position, this value is set by default from the Position Data page.
Type Appt (type of appointment)	Enter the employee's type of appointment, such as <i>Career</i> (Competitive Service Permanent), <i>Limited</i> , <i>Executive</i> , or <i>Schedule A - C</i> .
Posn Occupied (position occupied)	This field identifies the type of appointment which can occupy the position. Values are Competitive, Excepted Senior Executive Service (SES) Career Reserved and SES General. This is a CPDF reported field.
Work Schedule	Set by default from the Add/Update Position Info – Description page.
FLSA Status (Fair Labor Standards Act status)	Set by default from the position data on the Job Code page.
Adds to FTE Actual Count (adds to the full-time equivalency actual count)	Select to include this employee's job when processing FTE edits for budgeting purposes.
Standard Hours	The field is populated by default with the standard hours for the agency as specified in the Installation tables. You can change this information manually.
FTE (full-time equivalency)	The percentage of full-time the employee should normally work in this job. The system calculates this value based on the standard hours entry for this job and the standard work period. However, you can override the system-calculated FTE and enter a new value less than 1.0.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Using Frequencies”

Entering Employee Compensation Information

Access the Compensation page.

Data Control	Personal Data	Job	Position	Compensation	Employment 1	Employment 2

EmplID: NEW Empl Rcd#: 0

Compensation Data Find | View All First ◀ 1 of 1 ▶ Last

Effective Date: 11/11/2002 Transaction# /Seq 1 PAR Status: Processed by Human Resources + -

Act Type: Hire NOA Code: 100 Empl Status:

Pay Rate Determinant: Regular Rate Pay Basis: Per Annum

Pay Plan / Table/Grade: KC02 Step: 0 Step Entry Date:

Rtnd PP/Table/Grade: Step: 0 Grade Entry Date:

Quoted Pay

Base Pay: Compensation Frequency: Monthly

Loc/LEO Adjust: 0.00 Annuity Offset Amount:

Adjusted Base Pay: ☐ Benefit Base Override FEGLI Base:

Total Pay:

[Other Pay Information](#) [Expected Pay](#) [Accounting Info](#)

Compensation page

Note. Multiple Components of Pay, Derivation of Rates, and related features are not currently supported by PeopleSoft Human Resources USF functionality.

Many values on this page are set by default from values you entered in the Department and Job Code fields on the Job page. Override these values if necessary.

Pay Rate Determinant	Select a pay rate determinant.
Pay Plan/Table/Grade	Select the pay plan, table, and grade.
Step	Assign the correct step for the employee.

Note. For certain Pay Rate Determinants this is not an option and the field does not accept data.

Step Entry Date	The effective date of the request for this action. If the Multi-Step/Grade check box is selected on the Installation table and you select a step on this page, the system automatically enters the base pay for that step.
Rtnd PP/Table/Grade (retained pay plan/table/grade)	There are several instances where retained grade or pay is authorized based on prior federal experience within the employing agency or at another federal agency. After selecting the appropriate pay rate determinant (for example, Retained Grade-Diff Posn), you can enter information in this field.
Step and Grade Entry Date	Enter the step and the date the employee was first assigned to the grade and step.

Base Pay	If you are using partial or full position management, a value is set by default here based on your prior assignment in the Step field. A GM pay plan position is the exception to this rule. Because the GM pay plan has no steps, you must enter the base pay amount. If you selected the Position Override check box on the Job page, you may also enter a base pay amount for a position with steps. This is appropriate in cases where the base pay amount is beyond the step 10 level. Enter the base pay amount based on the compensation frequency period indicated. For example, if the frequency period is one month, the base pay entered would be the pay earned for one month. The system calculates and displays the value in the Loc/LEO Adjustment (if appropriate) and Total Pay fields after you have provided the compensation data.
Adjusted Base Pay	The system calculates and displays the adjusted base pay by applying the Loc/LEO adjustments to the employee's base pay. This field is used for pay limits computation of the locality pay.
Compensation Frequency	Set by default from the Job Code page; override if necessary.
Annuity Offset Amount	If the employee is an annuitant, enter a CSRS annuity offset amount.
FEGLI Base	The system calculates the FEGLI base rate. Select the Benefit Base Override check box to override this default and then enter a new amount.
Other Pay Information	Click to access the Other Pay Information page and enter compensation that employees receive that's in addition to base pay.
Expected Pay	Click to access the Expected Pay page and view the various pay rate and compensation calculations the system calculates and displays based on the Base Pay and Comp Frequency you enter on this page.
Accounting Info	Click to access the Accounting Information page and view a summary of the employee's job earnings distribution.

If you selected the Multi-currency check box on the Installation table and entered the base pay in a different currency from your base currency, the system converts the rates to the base currency and compares them with the ranges specified for this salary grade in the Salary Grade table. If the rates exceed the salary range, a warning message appears.

Default Values for Employment Data

After you enter job and position data, pay information is populated by default on the Compensation page. If you associated pay plans with job codes, the Pay Plan field is populated by default from the data in the Job Code table. The Grade field is populated by default from the Job Code page. After the values in the Pay Plan and Grade fields appear, the system also displays the Grade Entry Date field, which is the date the employee first joined the grade. When a value is entered in the Step field, the value in the Step Entry Date field populates by default. You can override these values if you choose.

The system verifies any combinations of pay plans and grades that you select. If the combination doesn't exist, a warning message appears.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Plan Salaries, “Setting Up Plan Salaries”

Entering Additional Compensation Information

Access the Other Pay Information page.

Other Pay Information

Find | View All First 1-2 of 2

Earnings Code	Description	Pay Period Amount	Quoted Annualized Amount	Expected Amount
A10	Admin Uncontrollable OT 10%			
R05	Retention Allowance 5%			

OK Cancel

Other Pay Information page

Earnings Code

Select the code for the additional pay type, such as automobile and beeper allowances. The system issues a warning indicating that the earnings code may be applicable to pay limits, at which time the employee's earnings calculation within payroll may be reduced.

Pay Period Amount

Enter the amount the employee receives each pay period for this type of pay. Options depend on the earnings code you enter.

Note. A message appears when you enter premium pay that is subject to a pay limit. During payroll calculation, if the premium earnings plus adjusted base pay exceed the pay limit, the premium pay is reduced.

Viewing Pay Rate and Compensation Calculations

Access the Expected Pay page.

Expected Pay

Geog Location Code: 110010001 District of Columbia
Locality Pay Area: 80 Washington-Baltimore
LEO Special Pay Area: 8 Washington-Baltimore
Locality Percentage: 7.27
Change Percent: 0.000

	Base Pay	With Locality/LEO Adjustment
Hourly:	9.16	16.43
Daily:	73.28	131.44
Biweekly:	732.80	1,314.40
Monthly:	1,587.73	2,847.87
Annual:	19,052.80	34,174.40
Total Other/Premium Pay:		5,126.16
Total Pay:		39,300.56

Expected Pay page

Change Percent	Displays information regarding a percent change when new rows are inserted that change the base salary amounts.
Base Pay	Based on the base pay and compensation frequency you enter, the system calculates and displays the hourly, daily, biweekly, monthly, and annual rates for this employee.
With Locality/LEO Adjustment	The system calculates the same base pay figures using the locality/LEO adjustment listed at the top of the page.
Total Other/Premium Pay	The total of annual expected pay for the items you entered on the Other Pay Information page.
Total Pay	The system calculates total pay by summing the annual pay with the locality/LEO adjustment and the total other/premium pay contributions.

Note. The Rate Change Amount and Rate Change Percent fields are used when awarding increases (not for new hires).

Note. If expected pay exceeds the pay cap, a message appears at the bottom of the page warning that the pay cap has been reached and pay was reduced.

Understanding Expected Pay and Quoted Pay Within PeopleSoft Human Resources Management for U.S. Federal Government

The difference between expected pay and quoted pay occurs as a result of the conversion factors used when comparing yearly and hourly pay rates on the Pay Plan page in the Pay Plan Table component and the Expected Pay Rate page.

Rather than using the hourly conversion factor of 2080, as is often used as a business calculation factor, the U.S. federal government uses 2087.

The Expected Pay page calculates the daily, biweekly, monthly, and annual rates using the base pay amount from the Compensation page. These figures are based on the hourly conversion factor you set for the pay plan on the Pay Plan table, typically 2087.

It also breaks out into separate columns the pay into base pay (no locality, no adjustments), pay with locality, and LEO pay. Total Other/Premium Pay is also calculated based on the amounts entered on the Other Pay Information page. So, as a result of using 2087 in these calculations, the estimated quoted pay on the Compensation page is slightly higher than what the federal employee actually receives in a year.

These two fields for expected and quoted pay may not match. The procedures that the federal government has for deannualizing and reannualizing quoted compensation rates are the cause of the difference. To deannualize a quoted rate of pay (convert to hourly), you divide the quoted rate of pay by 2087. To reannualize a quoted rate of pay to determine the expected pay, you multiply the derived hourly rate by the employee's scheduled weekly tour of duty and then multiply that by 52 weeks.

Following are two examples:

Example 1

Full-time employee (40 hours per week) with quoted rate of \$41,740 per year.

Quoted rate = \$41,740.

Hourly rate = quoted rate/2087 hours = \$41,740/2087 hours = \$20/hour.

Expected pay = hourly rate × standard weekly tour × 52 weeks = \$20/hour × 40 hours/week × 52 weeks = \$41,600.

Difference between quoted and expected pay on an annual basis = \$140.

Example 2

Part-time Employee (20 hours per week) with quoted rate of \$41,740 per year

Quoted rate = \$41,740.

Hourly rate = quoted rate/2087 hours = \$41,740/2087 hours = \$20/hour.

Expected pay = hourly rate × standard weekly tour × 52 Weeks = \$20/hour × 20 hours/week × 52 weeks = \$20,800.

Difference between quoted and expected pay on an annual basis = \$20,940.

See Also

Chapter 16, “(USF) Processing Personnel Action Requests,” page 391

Viewing Job Earnings Distributions

Access the Accounting Information page.

Accounting Information

Job Earnings Distribution:

☐ By Hours

☐ By Percent

☒ None

Compensation Rate:

0.00

CAD

Standard Hours:

40.00

GL Pay Type:

Account Code:

Find | View All

First

1 of 1

Last

Business Unit	Department	Job Code	Position	Shift	Earn Code	

GL Pay Type

Account Code

Standard Hours

Percent of Distribution

OK

Cancel

Accounting Information page

- Job Earnings Distribution

Select the appropriate option to indicate the job earnings distribution frequency: by hours, by percent, or not at all.

When you select the By Hours or By Percent options, the GL Pay Type and Account Code fields are unavailable for entry. Use the scroll bar to distribute earnings among departments.

If you select the By Hours option, then enter the hours to be distributed to each department in the Standard Hours field corresponding to each department entered.

If you select the By Percent option, enter a percentage corresponding to each department in the Percent of Distribution field. Percentages must total 100 percent and must equal the value in the Standard Hours field.
- Compensation Rate

The annual salary, including the locality and LEO adjustments.
- Standard Hours

Set by default from the Job Code page.
- GL Pay Type

Enter the GL pay type that has been established by your agency.
- Account Code

Indicate the type of account to which the earnings will be charged.
- Business Unit, Department, Job Code, Position, and Shift

Select the business unit, department, job code, position, and shift to which to charge the earnings.
- Earn Code (earnings code)

Specify the earnings code.

Hours If you select the By Hours option, then specify how many hours will be charged to the corresponding earnings code.

Percent of Distribution If you select the By Percent option, enter the percent to be charged to the corresponding earnings code.

Entering Current and Historical Employment Information

Access the Employment 1 page.

The screenshot shows the 'Employment 1' page with the following fields and sections:

- Top Navigation:** Data Control, Personal Data, Job, Position, Compensation, **Employment 1**, Employment 2
- Employee Info:** EmplID: NEW, Empl Rcd#: 0
- Employment Data 1:** Find | View All | First | 1 of 1 | Last
- Effective Date:** 11/11/2002, **Transaction# /Seq:** 1, **PAR Status:** Processed by Human Resources
- Act Type:** Hire, **NOA Code:** 100, **Empl Status:**
- EOD Dt:**, **Hire NTE Dt:** 11/30/2004, **Mand Retire Dt:** [Calendar Icon], [Exp Dates](#)
- Rehire Dt:**, **Separation Dt:**, **Next Review Dt:** [Calendar Icon], [Appt Data](#)
- Service Computation Dates:**
 - *Leave: 11/11/2002 [Calendar Icon], Retire: 11/11/2002 [Calendar Icon]
 - RIF: 11/11/2002 [Calendar Icon], TSP: 11/11/2002 [Calendar Icon]
 - LEO: [Calendar Icon], Sev Pay: 11/11/2002 [Calendar Icon]
- Service Conversion Dates:**
 - Conv Begin Date: [Calendar Icon]
 - Career Conv Date: [Calendar Icon]
 - Career-Cond Conv Date: [Calendar Icon]
- Within-Grade Increase Data:**
 - WGI Status:** Waiting [Dropdown], **Non-Pay Hours:** 0.00, **Last Increase Dt:** [Calendar Icon]
 - WGI Due Date:** [Calendar Icon], **WGI:**, **LEI Date:** [Calendar Icon], **Intermittent Days Worked:** 0

Employment 1 page

Many values on this page are set by default from values entered in the Department and Job Code fields on the Job page. When hiring a new employee, the system populates most of the dates on this page with the effective date of the hire action. These dates are used later in various ways to calculate the employee's service time. Override values as necessary.

If at a later date you change the status of an employee's employment, depending on the administrative action you select in the Job Data pages, the system will display the rehire date.

The Separation Date field is display-only, and shows the date that the employee left employment.

EOD Dt (entered on duty) Reflects the effective date of the hire request after you save the request. This date is distinct from the SCD dates in that it describes when the employee started federal employment with the employing agency; it does not reflect total federal service involving the employee's total career.

Hire NTE Dt (hire not to exceed date) Set by default from the Not to Exceed Date field on the Data Control page. In the case of a temporary hire, it designates the length of time the temporary employment can last.

Mand Retire Date (mandatory retirement date) If applicable, enter the employee's mandatory retirement date.

Exp Dates (expiration dates)	Click to access the Expiration Dates page and enter expiration dates for temporary promotions, position changes, sabbaticals, or detail assignments.
Next Review Dt (next review date)	Enter the next review date. This date, while informational only, can serve as a tickler date for employee performance review.
Appt Data (appointment data)	Click to access the Appointment Info page and enter appointment limits.

Service Computation Dates

Leave	Enter the service computation date for beginning the employee's leave computation.
Retire	Enter the service computation date for beginning the employee's retirement computation.
RIF (reduction in force)	Enter the computation date for establishing the employee's RIF position.
TSP (thrift savings plan)	Enter the computation date for beginning the employee's thrift savings plan eligibility computation.
LEO (law enforcement officer)	Enter the computation date for beginning the employee's law enforcement officer retirement computation.
Sev Pay (severance pay)	Enter the service computation date for establishing the employee's severance pay computation.

Service Conversion Dates

Conv Begin Date (conversion begin date), Career Conv Date (career conversion date), and Career Cond Conv Date (career-conditional conversion date)	Enter the conversion begin date, the career conversion date, and the career-conditional conversion date. If the employee is hired using a career-conditional appointment, the conversion begin date is the effective date of the hire. Upon completion of the three-year period, the personnel office processes a PAR converting the employee to a career appointment and enters that effective date in the Career Conv Date field. If the employee was hired under a temporary appointment, the conversion begin date is the effective date of the hire. When the personnel office processes a PAR to convert the temporary employee to a permanent employee with a conversion to career conditional competitive appointment, the Career-Cond Conv Dt field is the effective date for that transaction.

Within-Grade Increase Data

WGI Status (within-grade increase status)	Enter the WGI status, such as <i>(none)</i> , <i>Approved</i> , <i>Waiting</i> , <i>Denied</i> , <i>N/A</i> , or <i>Postponed</i> . For a new employee, the default value is <i>Waiting</i> . <i>Created</i> is an option for WIGI status, which is reserved for the automatic WIGI process. Do not change this online, as the WIGI process won't select it unless the status is <i>Waiting</i> or <i>Approved</i> .
Non Pay Hours WGI and Intermittent Days Worked	Leave these informational fields blank at hire. After running the WGI/Tenure Update process for leave without pay and processing a PAR, update the Non Pay Hours WGI field with nonpay hours from the WGI/Tenure Update report.

Last Increase Dt (last increase date), **WGI Due Date**, and **LEI Date** (last equivalent increase date)

The system automatically enters the last increase date, LEI date, and WGI due date. For certain actions, the WGI Due Date field is set by default to the pay period begin date based on the Pay Calendar tables that your organization has established. For WGI due date calculation, it is imperative that you set up your pay calendars for this year, plus three years in advance of the current year. For example, if the current year is 1999, then your Pay Calendars need to be set up for 1999, 2000, 2001, and 2002.

If you enter a date that isn't the beginning of a pay calendar, the system displays a message suggesting valid pay calendar begin dates into which your date falls. If the system suggests a date of January 1, 1899, this indicates that your pay calendars do not exist. See your Implementation project manager about creating additional pay calendars.

After running the WGI/Tenure Update process for leave without pay and processing a PAR, update the WGI Due Date field with the extended due date from the WGI/Tenure Update report.

See Also

Chapter 17, “(USF) Processing Automatic Actions for Probation, Tenure, and Within-Grade Increases,” page 405

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Using Pay Calendars”

Entering Expiration Dates

Access the Expiration Dates page.

Expiration Dates

Temporary Promotion:

Temporary Position Change:

Sabbatical:

Detail:

Expiration Dates page

The following fields, which are updated by the user, are informational only.

Temporary Promotion	Enter the temporary promotion date.
Temporary Position Change	Enter the temporary position change expiration date.
Sabbatical	Enter the sabbatical expiration date.
Detail	Enter the detail assignment expiration date.

Entering Appointment Limits

Access the Appointment Info page.

Appointment Info

Nature of Action Code:

Current Appointment Auth #1:

Current Appointment Auth #2:

Benefit Record Number:

Severance Pay Previous Weeks:

Appointment Limits

Amount:

Hours:

Days:

Special Employment Program:

Welfare to Work:

OK

Cancel

Appointment Info page

Nature of Action Code, Current Appointment Auth #1 (current appointment authorize #1), and Current Appointment Auth #2 (current appointment authorize #2)	CPDF reportable fields maintained to reflect historic data on the employee’s current appointment authority used to authorize the employee’s hire.
Benefit Record Number and Severance Pay Previous Weeks	For a new hire, you do not need to enter the benefit record number and the number of severance pay previous weeks. If changes occur to the employee’s employment status, you must update these fields (for example, RIF).
Special Employment Program	Indicate the special employment program: <i>Not Applicable</i> , <i>Other</i> , <i>Presidential Management Intern</i> , <i>SES Candidate Development</i> , or <i>Veteran’s Readjustment Program</i> .
Welfare to Work	Select the value that describes whether the employee is hired under a U.S. government-specified Welfare to Work Program: <i>Hire not Welfare to Work Prog</i> <i>Not Applicable</i> <i>Welfare to Work Program Hire</i>

The system creates a NOA 050 or 060 transaction record based on the value you select. You do not have to create a separate PAR row for NOA 050 or 060 to report Welfare to Work employees to OPM. At hire, if the employee is employed under the Welfare to Work program, indicate which program is applicable to the employee on the hire action itself.

Appointment Limits

Amount, Hours, and Days Depending on the type of appointment used to hire the employee, enter the appointment limits amount, hours, or days.

Entering Additional Employment Information

Access the Employment 2 page.

The screenshot shows the 'Employment 2' page with the following details:

- Tabs:** Data Control, Personal Data, Job, Position, Compensation, Employment 1, **Employment 2**
- EmplID:** NEW, **Empl Rcd#:** 0
- Employment Data 2:** Find | View All | First | 1 of 1 | Last
- Effective Date:** 11/11/2002, **Transaction# /Seq:** 1, **PAR Status:** Processed by Human Resc
- Act Type:** Hire, **NOA Code:** 100, **Empl Status:**
- Bargaining Unit:** [Text Box], **Union Code:** [Text Box], **Union Anniversary Date:** [Text Box]
- Reports To Position:** 10000001, **Supervisor ID:** KUZ009, **Manager-Compensation/Benefits:** Campos,Eduardo B.
- Tenure:** [Dropdown Menu]
- Probation Dates:**
 - Probation Date:** [Text Box] [Calendar Icon]
 - SES Probation Date:** [Text Box] [Calendar Icon]
 - Supv/Manager Probation Date:** [Text Box] [Calendar Icon]
- Retained Grade Expires:**
 - Begin Date:** [Text Box] [Calendar Icon]
 - Expires Date:** [Text Box] [Calendar Icon]
- Permanent Data - RIF:**
 - Pay Plan/Grade:** GS [Text Box] 05, **Comp/Area Level:** [Text Box] [Text Box]
 - RIF Series:** 0230 [Text Box] Employee relations
- Links:** Phone Nbrs, Time F, Non Pay Data, Securi

Employment 2 page

Bargaining Unit Select a code representing the bargaining unit to which the employee belongs.

Union Code If your new employee belongs to a union, select the appropriate union code.

Union Anniversary Date If the bargaining unit covers the position and the employee has elected to join, enter the date on which the employee's seniority ranking within the union is based.

Reports To Position and Supervisor ID Set by default from the Add/Update Position Info component (if the agency has the Position Management option activated).

Tenure Indicate the type of tenure.

Probation Dates

Probation Date, SES Probation Date (Senior Executive Service probation date), and **Supv/Manager Probation Date** (supervisor/manager probation date)

Enter the applicable probation date, probation, or supervisor/manager probation date. There are different time frames associated with each probation date based on different regulatory requirements.

Retained Grade Expires

Begin Date and Expires Date

Where appropriate, enter the employee's retained grade begin date and expires date. These are informational fields provided for the agency to track the employee's eligibility to maintain retained grade.

Permanent Data-RIF

These informational fields enable the agency to track the employee relative to RIF processing.

Pay Plan/Grade

Enter the employee's pay plan and pay grade.

Comp/Area Level

Enter the employee's compensation area and level.

RIF Series

Select the employee's RIF series.

Links

Phone Nbrs (phone numbers)

Click to access the Employment Phone Numbers page and enter phone numbers for the employee.

Non Pay Data

Click to access the Non Pay Data page and enter information related to a status of non-pay.

Time Reporter Data

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

Security Info (security information)

Click to access the Security Info page and enter information related to the employee's security clearance and financial disclosure.

See Also

Chapter 16, "(USF) Processing Personnel Action Requests," page 391

Tracking Nonpay Status Information

Access the Non Pay Data page.

Non Pay Data

NOA Code:

Expiration Date: **Last Date Worked:** 

SCD Hours: **Probation Hours:** **Career Tenure Hours:**

Non Pay Data page

NOA Code	Indicates the PAR processed to place the employee in a nonpay status.
Expiration Date	The nonpay expiration effective date, which reflects the projected expiration of nonpay status and consequent processing of a PAR to return to pay status.
Last Date Worked	Enter the date last worked prior to being placed in a nonpay status.
SCD Hours, Probation Hours, and Career Tenure Hours	Enter and track SCD hours, probation hours, and career tenure hours in these informational fields.

Entering Employee Security and Financial Disclosure Information

Access the Security Info page.

Security Info

Security Clearance: 

Status:  **Status Dt:** 

Financial Disclosure Required ☐ **Due Date:** 

Security Info page

Security Clearance	If the employee has received a security clearance, enter the level of security clearance or select <i>Not Required</i> to indicate that clearance isn't required.
Status and Status Dt (status date)	Enter the status and status date.
Financial Disclosure Required and Due Date	If a financial disclosure is required, select this check box, and enter the due date for receipt.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions, “Setting Up Positions,” (USF) Setting Up Position Titles

PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions, “Setting Up Positions,” Creating Positions

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Setting Up Jobs,” Classifying Jobs

Entering Education Information

To enter information on the employee’s education, use the School Education page.

When you save the Hire component, the system returns the School Education page for you to complete. After you have completed the page, the save process for the Hire component continues.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies, “Tracking Employee Competencies and Accomplishments,” Entering Employee Accomplishments

Assigning Employees to Positions

If you are organizing part or all of PeopleSoft Human Resources by position (using PeopleSoft Human Resources Manage Positions), you can hire some or all new employees into positions on the Hire Employee pages, accessed from the Workforce Administration, Increase Workforce menu. If you’re not using PeopleSoft Human Resources Manage Positions, you can also use position numbers but the system won’t process position-related data.

Hiring Employees Into Positions

When you assign an employee to a position, many fields on the Hire pages are set by default from the Add/Update Position Info component (Organization Development, Position Management, Maintain Positions/Budgets, Add/Update Position Info).

To take advantage of this feature when hiring employees into positions, follow these steps:

1. Select a hire action on the Data Control page.
2. Select a position number on the Job page before entering values in other fields on this page.
You define positions and assign position numbers in the Add/Update Position Info component.
3. When you move out of the Position field on the Job page, the system completes the position-related fields with default data from the Add/Update Position Info component.

These fields include Job Code, Agency, Sub-agency, Department, and Location, which are unavailable for entry. The system completes the Effective Date field using data from the Data Control page.

PeopleSoft Human Resources issues a warning message if you assign an employee to a position that has already been filled by another employee and if a new employee appointment exceeds the maximum head count for that position. The system calculates the current head count and shows the appropriate indicator for open/filled on the Position Data – Description (POSITION_DATA1) page. The system does this when you change employee assignments.

4. Enter exceptions to default position data for this employee by selecting the Position Override check box.

You may need to enter exceptions to the default position data for this employee. For example, the employee may be located in a different location than the standard location associated with the position. Selecting the Position Override check box causes fields previously unavailable for entry, including the Job Code, Agency, Location, and Department fields, to become available. You can then enter exceptions in these fields.

Note. If you override the defaults for position-related data, you must maintain the employee data manually. The system won't update position data automatically again until you clear the Position Override check box.

When you are hiring an employee, the Position Management Record field is unavailable. The system uses this field to indicate that it has automatically inserted a data row in the Job Data pages due to changes you've made to fields in the Add/Update Position Info component that overlap with fields here.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions, "Setting Up Positions"

Hiring Job Applicants

Use the Recruit Workforce business process to track information about people who apply for jobs with your organization. This business process includes a component called Hire (Recruiting, Hire Applicants, Hire USF) that is designed especially for hiring job applicants. When you use this component to hire an applicant, the information you've already entered in the system automatically becomes part of the employee's record.

This component assigns employee IDs to applicants in a slightly different way from new hires. All other fields on these pages are documented earlier in this chapter.

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

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce, "Hiring Applicants"

Adding Concurrent Jobs

If your organization allows employees to hold more than one job, use the Concurrent Hire component to enter new jobs for employees who already have one or more jobs. The component consists of the Data Control, Job, Position, Compensation, Employment 1, and Employment 2 pages.

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

See Also

Chapter 6, “Hiring Your Workforce,” page 63

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Working With Multiple Jobs”

Prerequisites

Before you can add multiple jobs for your workforce, you must:

- Select the Multiple Jobs Allowed check box in PeopleTools.
- Update user security so that users have access to the menu options they’ll need.

Printing Appointment Affidavits and Preliminary Employment Data Forms

This section explains how to run these reports:

- Appointment Affidavits (FGSF61)
- Request for Prel Employ Data (request for preliminary employment data) (FGSF755)

Pages Used to Print the Forms

Page Name	Object Name	Navigation	Usage
SF61 Report	RUNCTL_FGSF61	Workforce Administration, Job Information, Reports, Appointment Affidavits USF	Produces an Appointment Affidavit STANDARD FORM 61 form to be signed by an appointee.
SF-75 Run Control	RUN_CNTL_FGSF75	Workforce Administration, Job Information, Reports, Request Prelim Empl Data USF	Produces a Request for Preliminary Employment Data form.

CHAPTER 8

Entering Additional Data in Human Resources Records

This chapter provides an overview of additional employee data and discusses how to:

- Locate personnel records.
- Set up and track employment contracts.
- Enter temporary assignments.
- Track disabilities.
- Handle company credit cards.
- Handle company property.
- Track dependent and beneficiary data.
- Track emergency contacts.
- Manage citizenship and visa/permit information.
- Manage driver's license information.
- Enter bank account information.
- Track volunteer activity.
- Enter and track additional employee data.

Understanding Additional Employee Data

Once you've entered a person's basic personal, job, and employment data into your human resources system, use other pages in the Workforce Administration menu to add and track a broad range of other information for that person. Enter all of this information for both employees and non-employees.

While many of the pages covered in this chapter are optional, you may find them useful for tracking and reporting, and for maintaining compliance with government regulations. You can also provide other people, such as your employees or industrial relations representatives, with information that helps them perform their jobs more effectively.

Locating Personnel Records

The first time you open an additional information page, the system displays the dialog box for you to select the person for whom you're adding data. If you don't know the person's employee ID, there are two ways to locate the person's record:

- Use the dialog box to search for the correct record by name, partial last name, alternate character name, department, setID, or employment status
- Use the Search by National ID page to find a person's employee ID using a national ID.

After you have the person's employee ID, enter it in the dialog box.

When you move to a new page, the system assumes you want to keep working on the same person's record. It automatically displays that person's information on the new page. To change to a different person's record, select the Cancel button to clear the current data, then choose a page. The system once again prompts you to choose the person you want.

This section discusses how to:

- Search for employee information using a dialog box.
- Search by National ID.

Page Used to Locate Personnel Records

Page Name	Object Name	Navigation	Usage
Search by National ID	NID_LOOKUP	Workforce Administration, Personal Information, Biographical, Search by National ID	Locate a person's employee ID using their national ID. Once you find the person's employee ID, use it when you move to other search pages.

Searching for Employee Information

Use the following search dialog box to find an employee's information. You encounter this dialog box when you enter most pages in the Workforce Administration menu.

Find an Existing Value

EmpID: begins with []

Name: begins with []

Last Name: begins with []

Department SetID: begins with []

Department: begins with []

Alternate Character Name: begins with []

Personnel Status: = []

☐ Include History ☐ Correct History ☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Searching for employee information

You must have already created employee records in PeopleSoft Human Resources for the person for whom you are searching. In other words, you must have already hired or added the person as an employee or a nonemployee.

Last Name

If you're not sure of the entire employee ID or name, make a partial entry in this field and click Search to search for the correct name and ID.

You cannot use this field to search for last names using special characters, such as double byte Japanese characters.

Department SetID

Select a setID here and a department in the next field to narrow the search to employees in a particular department.

Department

Select a department to narrow the search to employees in that department. You must also select a setID in the previous field.

Alternate Character Name

If you turned on the Alternate Character feature for your user ID on the Primary Permission List Preferences Table, you can also search for employee names, using the Alternate Character search feature in PeopleSoft Human Resources.

Personnel Status

Use this field to narrow the search to employees only or nonemployees only. Select *None* (default), *Employee*, or *Non-Employee*.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Understanding PeopleSoft HRMS System Data Regulation"

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Working With Languages," Working With Double-Byte Characters

Searching by National ID

Access the Search by National ID page.

Search by National ID

National ID:

*Search in:

Lookup by NID

[Customize](#) | [Find](#) | [View All](#) |

First 1 of 1 Last

National ID	EmplID	Name	Country	National ID Type
223-22-9506	E2PI07	Green,Allen	United States	Social Security Number

Search by National ID page

- National ID** Enter the National ID of the person whose records you want to view.
- Search In** Select *Employees* or *Dependents and Beneficiaries* to narrow your search.
- Search...** Click to have the system displays a list of the records that match the ID you entered.

Setting Up and Tracking Employment Contracts

Many organizations maintain contracts or other written agreements with their employees and contractors. PeopleSoft enables you to set up standard employment contracts for your organization.

This section discusses how to:

- Define different types of contracts.
- Set up standard contracts.
- Add basic contract information to an employee's contract.
- Add special contract clause information to an employee's contract.
- Add signature date, responsible party, and probation information to an employee's contract.
- Generate the Contract Information report.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “(E&G) Administering Contract Pay”

Pages Used to Set Up and Track Employment Contracts

Page Name	Object Name	Navigation	Usage
Contract Type Table	CONTRACT_TYPE_TBL	Workforce Administration, Job Information, Contract Administration, Define Contract Types	Define the different types of contracts that your enterprise administers.
Contract Clause Table	CNT_CLAUSE_TABLE	Workforce Administration, Job Information, Contract Administration, Define Contract Clauses	Define special languages and riders that can be added to the main body of an employment contract.
Contract Template Table	CNT_TEMPLATE_TABLE	Workforce Administration, Job Information, Contract Administration, Define Contract Templates	Set up all of your organization's standard employment contracts. Use the information that you define here when you assign particular contracts to employees and temporary workers in your organization.
Contract Status/Content	CONTRACT1	Workforce Administration, Job Information, Contract Administration, Update Contracts, Contract Status/Content	Add or update basic information about the contract between your organization and an employee, including the contract duration, type, and content. You must have previously set up contract template ID's on the Contract Template Table page.
Contract Type/Clauses	CONTRACT2	Workforce Administration, Job Information, Contract Administration, Update Contracts, Contract Type/Clauses	Add or update any special contract clause information to the standard contract language for this employee.
Original Contract Data	CONTRACT_BEL_SEC	Click Original Contract on the Contract Type/Clauses page.	Enter information about the original contract that the new contract is replacing.
Signature Date/Probation Info	CONTRACT3	Workforce Administration, Job Information, Contract Administration, Update Contracts, Signature Date/Probation Info	Add or update the signature date, responsible party, and probation information. View basic employee job data.
Contract Information	RUNCTL_CNT001	Workforce Administration, Job Information, Contract Administration, Contract Information Report	Generate the Contract Information report (CNT001) that lists all contracts for an employee or the contract history for all employees within a designated period.

Defining Different Types of Contracts

Access the Contract Type Table page.

Contract Type Table

SetID: BEL Contract Type: 01

Contract Type Find | View All First 1 of 1 Last

Effective Date: 01/01/1900 *Status: Active

Description: Employment

Short Description: Employment

▼ Spain

Contract Rule: ☐ Allowed Extensions

Min. Duration: Unit: Month

Max Duration: Unit: Month

Reduction ID: Soc.Sec.Nbr. for Employer Type: Regular

Long Description:

▼ Italy

*Applicability: All

Contract Type Table page

(ESP) Spain

Contract Rule

Enter the number of the law that governs this kind of contract. A typical law number includes the type of law, law number, and year. For example, RD 3290/1997 or Ley 22/1995.

The system doesn't edit your entry.

Allowed Extensions

Select to permit extensions to be added to this type of contract.

Min. Duration (minimum duration), **Max Duration** (maximum duration), and **Unit**

Specify the minimum and maximum length allowed for this type of contract. Enter a quantity in the Min. Duration and Max Duration fields and use the Unit field to select a unit of time. For example, if the minimum contract duration is six months, enter 6 in this field, then select *Months* from the available options in the Unit field.

Reduction ID

This field is active only if PeopleSoft Global Payroll for Spain is installed. Select the reduction ID that corresponds to the contract type. The reduction ID identifies the specific reduction definition/rule that applies to an employer. In certain limited cases—such as when a company hires employees with disabilities, or hires workers older than 45 years of age—the employer may qualify for a reduction in the amount of their social security contributions.

Soc. Sec. Nbr. For Employer Type (social security number for employer type)

Select a social security number type from the available options: *none, Part Time, Regular, and Training.*

(ITA) Italy

Applicability

Select whether this contract type is applicable to employees, nonemployees or both.

Setting Up Standard Contracts

Access the Contract Template Table page.

Contract Template Table

Contract Template ID: K00003 SetID: CAN

Contract Template Find | View All First 1 of 1 Last

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

*Description: Limited Contract

Short Description: Limited

Contract Type: 001 Limited Contract

*Contract Family: Temporary

Contract Content: This is a contract for the engagement of a temporary person from an employment agency to fulfill a limited-time function.

Contract Clauses Customize | Find | View All First 1-2 of 3 Last

*Sequence	*Contract Clause	Description	Clause Status
1	K07	Services to the Third Parties	Required
2	K05	Unauthorized info disclosure	Required

Contract Template Table page

You must have previously set up the contract type.

Contract Template

Contract Type

Select the contract type for this template from the contract types you have set up on the Contract Type Table page.

Contract Family

Enables you to group a class of contracts. For example, you may have one contract family for regular employee contracts and another for temporary employee contracts. Tying contracts to a contract family helps you narrow your search criteria when you select a contract template.

Contract Clauses

Use this group box to define any special contract clauses that should be attached as riders to this contract template.

Sequence	Enter the order in which to add the contract clauses to the contract.
Contract Clause	Select a contract clause from among those you've defined on the Contract Clause Table page. For example, a contract for a limousine driver requires that the employee have a driver's license.
Clause Status	Indicate if the clause is <i>Optional</i> or <i>Required</i> .

Adding Basic Contract Information

Access the Contract Status/Content page.

Contract Status/Content		Contract Type/Clauses		Signature Date/Probation Info	
Brusati, Clara Miss		Employee		EmplID: K10001	
Contract Data					
Contract Number:	0001	*Contract Status:	Inactive		
Contract Begin Date:	05/07/1999	Contract Expected End Date:			
Contract End Date:	11/18/2002	*Regulatory Region:	ITA		
☐ Additional Contract	☐ More than one year expected	Contract Template ID:		Initialize Contract	
Comment:					
Provider ID:					
Contract Content:	Contract for Assistant of CEO				
☐ Waive Working Time Compliance					
▼ Belgium					
RSZ-Category:		☒ RSZ-Submitted			
Reduced Charges Category:		Start Date:		End Date:	
Social Balance Category:					

Contract Status/Content page (1 of 2)

Spain

Probation/Vacation Info

Probation Period: Months Vacation Period: Months

Other Information

Begin/End Week: Monday / Friday

Compensation Rate:

Description:

Hiring Center:

Scheme ID:

S.S. Contribution ID:

Probation Info

Unemployment Condition:

☐ Re-Joined Disabled Employee

☐ First Self-Worker Employee

☐ Social Exclusion Employee

☐ Active Rent

Reduction Information

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

Reduction ID: Eff Date: 11/18/2002 Status: Active

Contract Status/Content page (2 of 2)

Contract Status	Indicate whether the contract is <i>Active</i> or <i>Inactive</i> .
Contract Begin Date	Enter the date when the contract begins. The current date is the default.
Contract Expected End Date	Enter the date when you expect the contract will end.
Contract End Date	Enter the date when the contract actually ended. This may differ from the date you expect the contract to end.
Regulatory Region	Enter a regulatory region.
Additional Contract	Select if the employee already has at least one employment contract. Leave blank if this is the employee's only contract.
More than one year expected	Select if you expect that this contract will result in more than one year of employment for this worker.

Note. This check box is required for contracts with Japanese employees.

Contract Template ID and Initialize Contract If you have defined a template for the contract, select an ID from among the list of valid templates stored on the Contract Template Table page, and click Initialize Contract.

Provider ID If this contract is with a nonemployee, specify the person's provider, agency, or employer.

Contract Content	If you entered a Contract Template code and clicked the Initialize Contract button, the system automatically completes this field with the content entered on the Contract Template Table page. Otherwise, enter the contract language.
Waive Working Time Compliance	Select if the contract allows working time compliance to be waived.
(BEL) Belgium	
RSZ-Category	If you're entering an employment contract and you selected <i>Employment</i> as the Contract Type on the Contract Type / Clauses page, choose an RSZ Category from among the valid RSZ category codes stored on the RSZ Category Table page (CNT_RSZ_TBL_BEL).
RSZ-Submitted	Select to indicate that social insurance premiums need to be paid by the employer to the Belgian RSZ governing body for this job contract.
Reduced Charges Category	Select from among the categories, if appropriate. Employers can lower their RSZ premium contributions if they are offering a job for one of these two reduced charges categories. Companies who employ workers who qualify for the reduced charges category enjoy lower employee costs.
Social Balance Category	Select the appropriate Social Balance category. This information goes on the BEL Social Report.
(ESP) Spain	
Probation Period	If this employee's contract includes a probation period, use these two fields to specify how long it will be. Use the first field to enter the appropriate quantity and the second field to select a unit of time. Units of time are <i>none</i> , <i>Days</i> , <i>Months</i> , or <i>Years</i> . For example, if the probation period is six months, enter <i>6</i> in the first field, then select <i>Months</i> in the second field.
Refresh Vacation	Click to enter the default value for vacation periods from the Labor Agreement page in the Vacation Period field.
Vacation Period	Use these two fields to specify how much vacation the employee receives per year. Use the first field to enter the appropriate quantity and the second field to select a unit of time. Units of time are <i>none</i> , <i>Months</i> , <i>Natrl Days (natural days)</i> , <i>Weeks</i> , or <i>Work Days</i> . For example, if the vacation period is 20 work days, enter <i>20</i> in the first field, then select <i>Work Days</i> from the options in the second field.
Begin/End Week	Specify the days when the employee's work week begins and ends. The default values are <i>Monday</i> and <i>Friday</i> .
Compensation Rate Description	Enter a free-form description of the employee's compensation rate.
Hiring Center	Select the hiring center responsible for hiring this person.
Scheme ID	Select a scheme ID.

S.S. Contribution ID (social security contribution ID)	Select a social security contribution ID for the contract and scheme ID selected. The system uses both the scheme ID and the contribution ID for social security calculations, to determine the percentage or fixed amount that is applied to the calculation of an employee's contribution.
Unemployment Condition	The AFI report contains this information.
Re-Joined Disabled Employee, First Self-Worker Employee, Social Exclusion Employee, and Active Rent	Select to indicate the employee has an official certificate and meets the conditions required to sign the specific kind of contract. The AFI report contains this information.
Reduction ID	If the employee is entitled to a reduction in social security contributions, select the reduction that applies: • <i>KE4</i> is the reduction for employees aged 60 and over with a minimum of 5 years' seniority. • <i>KE5</i> is the reduction for employees aged 65 and over with a minimum of 25 years' of contributions to Social Security.

Employment Contracts for Disabled Spanish Employees

If a Spanish employer hires a disabled person, the employment contract must be in writing. Once you hire a disabled person, you must keep the disabled worker for a minimum of three years. The disabled person has the right to work reduced hours for prorata less pay.

See Also

Chapter 6, "Hiring Your Workforce," Adding Nonemployees, page 125

Chapter 4, "Setting Up Country-Specific Tables," Defining Maximum and Minimum Social Security Ceilings, page 40

PeopleSoft 8.8 Human Resources PeopleBook: Manage Labor Relations, "Setting Up Labor Relations Data," Defining Labor Agreements, Labor Agreement Categories, and Employee Classes

Adding Special Contract Clause Information

Access the Contract Type/Clauses page.

Contract Status/Content		Contract Type/Clauses		Signature Date/Probation Info	
Brusati, Clara Miss		Employee		EmplID: K10001	
Contract Data					
Contract Number: 0001		Begin Date: 05/07/1999		Contract Status: Inactive	
Contract Type Find View All First 1 of 1 Last					
Effective Date: 05/07/1999		+ -			
Contract Type: 001		Limited Contract			
☒ Extend Contract					
▼ Belgium					
Duration:					
Statute:		Indep. Profession:			
Substatute:		Profession:			

Contract Type/Clauses page (1 of 3)

▼ France	
Category TDS:	
Multiple Employer Rate:	100.00
Work Contract / Activity Caract:	
Gross Reduction Percentage:	0.00
Social Security Code:	
Employee Professional Status:	
Category Status:	
Mandatory Base Scheme:	
▼ Italy	
Plan ID:	
Reason:	
Duration (Months):	
▼ Spain	
☐ Woman Hired 24 months after M. ☐ Woman Subrepresented	

Contract Type/Clauses page (2 of 3)

Contract Clauses		Find View All First 1 of 1 Last	
Seq#	Clause	Clause Status	
1	K08 Non-Competing Clause	Required	
Long Descr:	Company agrees that Employee will not at any time or in any manner solicit, contract, employ		
Comment:	Company agrees that Employee will not at any time or in any manner solicit, contract, employ (collectively "Engage") and/or Engage any customer, client, employee (collectively "Anybody") and/or Anybody doing business with Company. Unless, agreed by Company and granted permission through written acknowledgment by Company.		

Contract Type/Clauses page (3 of 3)

Contract Clauses

Seq# (sequence number)	When you add a clause to the contract, the system assigns a sequence number automatically.
Clause	Select a clause.
Clause Status	Defaults to the status associated with the clause you selected.

(BEL) Belgium

Duration	Select a duration period for the employment contract.
Original Contract	If <i>Replacement</i> defines the duration period, the Original Contract link appears. Click to access the Contract Replacement page to enter the employee ID and original contract number.
Statute	Select a contract statute, or employment category, for this employee.
Indep. Profession (independent profession)	If you selected <i>Self employed</i> as the contract type, provide the worker's independent profession here.
Substatute	Select a substitute, or employment subcategory. The system displays only those substitutes that are associated with the statute code you selected.
Profession	If you selected <i>Member of the Professions</i> as the contract type, indicate additional profession information here.

(FRA) France

Any payee who is eligible for an URSSAF contribution must be associated with a contribution class code (social security code or regime).

Category TDS	Select a payee category: <i>Apprentice</i> , <i>Executive</i> , and <i>Manager</i> . This field is used to prepare the DADS TDS report.
Multiple Employer Rate	Some contracts reduce the earnings ceilings for some contributions (for example, URSSAF). The reduction appears here as a percentage. If a payee has more than one employer, use the multiple employer rate to indicate the percentage of contributions that should be taken from each employer, in order to avoid over-taxing. The earnings ceilings are prorated using this rate. For example, suppose that a payee has two employers, and he receives 40 percent of his salary from employer A and 60 percent of his salary from employer B. In the Multiple Employer Rate field, employer A enters 40 and employer B enters 60.
Work Contract/Activity Caract	Used to prepare the DADS TDS report. Values are <i>Full Time</i> , <i>Home</i> , <i>Intermitt.</i> , <i>Part Time</i> , <i>Seasonal W</i> , <i>Temporary</i> , and <i>Wo Ctc Cpl</i> .
Gross Reduction Percentage	The gross reduction percentage is applied to the gross salary for specific job categories, such as for journalists and artists. These payees do not pay their contributions on their gross salaries. Instead, their gross salaries are reduced from the percentage input indicated here. For example, suppose that a payee

is entitled to a 30 percent reduction. If he has a salary of 10000 FRF, he contributes for only 7000 FRF. This field has a default value of 0.

Social Security Code Select a social security code. The social security code is the contribution class, or régime, of the payee. Any payee who is eligible for a contribution must be associated with a social security code.

Employee Professional Status Select the profession designated for this employee.

Category Status Select the category status.

Mandatory Base Scheme Select the base compensation scheme for this employee contract.

(ITA) Italy

Plan ID If the employee was assigned a contract type of *Training and Labor*, you must select a plan ID.

Reason If the employee was assigned a contract type of *Determined Period* contract, you must enter a reason for the contract.

Empl ID Replaced
(employee ID replaced) If the reason for the determined period contract type is *Maternity* or *Replacement*, select the employee ID of the employee who is being temporarily replaced by this contract employee.

The following fields appear in the Target Categorization group box only if the Contract Type is Training and Labor.

Labor Agreement Select the labor agreement for this contract and plan ID.

Category Select the labor category for this contract.

Subcategory Select the subcategory for this contract.

Subcategory 2 If the subcategory selected above has further divisions, select the subcategory 2 here.

(ESP) Spain

Woman Hired 24 months after M. (woman hired 24 months after maternity) Select to indicate the employee is a woman hired after 24 months of maternity leave. The AFI report contains this information.

Woman Subrepresented Select to indicate the employee is a woman hired in a company or sector where women are underrepresented.

See Also

Chapter 9, “(BEL) Entering Additional Data for Belgian Workers,” Setting Up Belgian Employment Contract Statutes for Claeys Calculations, page 246

Adding Signature Date, Responsible Party, and Probation Information

Access the Contract Data - Signature Date/Probation Info page.

Contract Status/Content		Contract Type/Clauses		Signature Date/Probation Info	
Brusati, Clara Miss		Employee		EmplID: KI0001	
Contract Data					
Contract Number: 0001		Begin Date: 05/07/1999		Contract Status: Inactive	
Workforce Information Find View All First 1 of 2 Last					
Effective Date: 01/01/2000		Empl Rcd#: 0		Job Indicator: Primary	
Action / Reason: Promotion		Outstanding Performance			
Company:	Business I	Pay Group:		Work Period:	Weekly
Business Unit:	ITA BU	Reg/Temp:	Regular	Hourly Rate:	46730.769231
Department:	Head	Labor Agreement:	Credito	Monthly Rate:	8100000.000
Location:	MI Down	Category:	Area 3	Annual Rate:	97200000.000
Reg Region:	Italy				
Signature Date:		Minimum Hours:		Maximum Hours:	
Responsible ID:					
Probation Information Find First 1 of 1 Last					
*Probation Date:		Reason:			

Contract Data - Signature Date/Probation Info page

The display-only data at the top of this page is derived from the Job Data component.

Signature Date	Enter the contract's signature date. This information is required in some European countries, including Germany.
Responsible ID	Enter the company agent who drafted the contract and who is responsible for its language.
Minimum Hours and Maximum Hours	Hours default from the values you indicate on the Installation table for this contract.
Probation Date	Enter multiple probation dates if they are required for this employee The probation date you enter here also appears on the employment record for this employee.
Reason	Indicate a probation reason, including <i>New Date</i> and <i>Un-perform</i> (indicating additional probation time for failure to perform within expectations for the position).

Generating the Contract Information Report

Access the Contract Information page.

EmplID (employee ID)	Enter the employee ID of the employee for whom you want to list contracts. If you leave this field blank, the report prints the contract history (within the date range you specify) for all employees.
Start Date and End Date	Enter the date range for which you want contract information.

Entering Temporary Assignments

This section provides an overview of temporary assignments and substantive jobs and discusses how to:

- Enter a temporary assignment.
- Run temporary assignment termination and substantive job reactivation.
- Add a partial temporary assignment.

Understanding Temporary Assignments and Substantive Jobs

This section discusses:

- Substantive jobs
- Temporary assignments
- Data row impacts
- Additional considerations for temporary assignments and data processing

Substantive Jobs

The substantive job assignment is the position the employee is hired into originally.

Temporary Assignments

When an employee covers the responsibilities of another position besides the substantive position, the employee works a temporary assignment. Temporary assignment data must be tracked the same way substantive job data is tracked.

For example, an employee hired into a teaching appointment takes this as the substantive job. The employee then receives a one month temporary assignment as a department head. The original teaching position is suspended for the duration of the temporary assignment.

It is also possible that the employee takes a temporary assignment on a partial basis. So, the employee might retain the substantive teaching position for twenty hours a week while also working the temporary assignment as department head for the other twenty hours. The employee cannot work beyond the forty-hour workweek but any combination of assignments might be entered to fill the forty hours.

Data Row Impacts

The Temporary Assignments feature requires that the system insert data rows at various stages throughout the process. For example, when selecting Temporary Assignment as the Action/Reason, the system inserts a second data row which puts the substantive job on hold. When a data row has been inserted by the system, the word “*system*” appears next to the employee record number when viewed later. These data rows show an Action/Reason of *SUB* (hold substantive job), *RFA* (return from temporary assignment), or *RTS* (return to substantive job).

Additional Considerations for Temporary Assignments and Data Processing

Review these additional considerations when creating temporary assignments:

- When Position Data changes, this updates Position Data for all employees in the effected position regardless of the assignment being temporary or substantive. This does not alter the active or inactive status of the employee(s) in the effected position.

Similarly, when the substantive position changes this does not effect the temporary assignments for the employee. The only exception to this would be the unlikely possibility that an employee’s temporary and substantive assignments be in the same position.

- The employee pay rate matches the active assignment. If an employee works multiple assignments beyond the substantive job, the pay prorates for each assignment. For example, if the employee teaches for twenty hours a week and acts as department head for twenty hours a week, payroll processes each job at 50% of the standard pay. You can override the position data to change the pay rate manually on the Compensation page.

Note. Use the Job Data component pages for creating temporary assignments.

Pages Used to Process Temporary Assignments

Page Name	Object Name	Navigation	Usage
Reactivate/Termination Update	RC_TEMP_ASSGN_UPDT	Workforce Administration, Job Information, Temporary Assignments, Reactivate/Update Termination	Run the temporary assignment termination and substantive job reactivation process.
Temp Assignment w/out End Date (temporary assignment without end date)	RUNCTL_TAS001	Workforce Administration, Job Information, Temporary Assignments, Temp Assignmt w/out End Date	Run the Temp Assignment w/out End Date report (TAS001). The report lists employees currently on temporary assignment where end dates have not been defined.
Temp Assignmt Due to Complete (temporary assignment due to complete)	RUNCTL_TAS002	Workforce Administration, Job Information, Temporary Assignments, Temp Assignmt due to Complete	Run the Temp Assignment due to Complete report (TAS002). This report lists employees due to complete temporary assignments within the user specified date range.

See Also

Chapter 6, “Hiring Your Workforce,” Entering Employee Job Information, page 92

Chapter 3, “Setting Up the Administer Workforce Business Process,” Defining Duty Types and Reasons for Personnel Actions, page 9

Entering a Temporary Assignment

To enter a temporary assignment:

1. On the Job Data - Work Location page, locate the substantive job that will be put on hold during the temporary assignment.
2. Insert a new data row with the following parameters:
 - The effective date that the temporary assignment begins.
 - *Temporary Assignment* for the Action/Reason.

When you use this value as the Action/Reason the system suspends the employee’s substantive job, transferring the substantive job data, including payroll and benefits information, to the next employee record for this employee. The Reactivation/Termination process reactivates the substantive job upon termination of the temporary assignment.

 - The temporary assignment position number, if applicable.
3. On the Job Data – Job Information page enter the termination date for the temporary assignment in the Planned Exit field (optional).
4. Select the End Job Automatically check box to end the job on the termination date. This also reactivates the substantive job being put on hold when you run the Reactivation/Termination process.
5. Select the type of duties in the Duties Type field for this temporary assignment.

Note. You must enter the Planned Exit Date *and* select End Job Automatically for the Reactivation/Termination Process to run automatically for each assignment. If you do not complete these fields, the Temporary Assignment termination and Substantive Job reactivation must be handled manually.

While the previous procedure outlines the required actions for entering temporary assignments, you can also make other adjustments, as necessary, on any of the pages in the component. For example, it might be necessary to adjust the pay rate on the Compensation page. This should all be done while creating the temporary assignment. When you save this information, the system suspends the substantive position.

Running the Temporary Assignment Termination and Substantive Job Reactivation Process

Access the Reactivate/Termination Update page.

Enter the Company and Expected Job End Date up to: and run the Reactivate/Termination Update process (HR_REACTVTER).

This process must be run periodically to terminate temporary assignments (with job end dates) and reactivate substantive positions. This process inserts new data rows into the employee record. These data rows have reason codes of *SUB* (hold substantive job), *RFA* (return from temporary assignment) and *RTS* (return to substantive job) and the designation “*system*” next to the employee record number when viewed later.

Adding a Partial Temporary Assignment

You can add a temporary assignment that is fewer than 40 hours per week while maintaining the substantive job filling the remaining hours. For example, an employee assigned to a temporary position that requires only 10 hours a week would retain the substantive position for the other 30 hours. In this case, both jobs must remain active.

To allow both jobs to remain active, use the Assign Additional Job component to enter the temporary assignment. You must then adjust the standard hours of the substantive position so that the hours for both jobs—substantive and temporary—combined equals 40 hours. You can still enter an end date for the temporary assignment and have that job end automatically. However, you will need to manually readjust the standard hours for the substantive position after the temporary assignment ends.

To replace a substantive job with two or more temporary assignments, choose one of the temporary assignments to replace the substantive job following the same procedure for assigning one temporary job, adjusting the hours appropriately. Then assign the second temporary position as a concurrent job.

If an employee has multiple substantive positions and is being assigned one temporary position, the temporary assignment can only be assigned to one of the substantive positions. The other substantive positions must be manually suspended and reactivated using *Hold Substantive Job* and *Return to Substantive Job* as the Action/Reason.

Note. When assigning any combination of temporary assignments, you can still select the End Job Automatically check box on the Job Information page for the temporary assignment. However, if you have adjusted the standard hours for the substantive position, you must manually set the standard hours to the original setting once the temporary assignment has ended.

See Also

[Chapter 6, “Hiring Your Workforce,” Adding Concurrent Jobs, page 129](#)

Tracking Disabilities

You can track any disabilities your employees may have, as well as check your own facilities’ accessibility. Administer Workforce includes a number of reports that list disability information.

This section discusses how to:

- Define workplace accommodation types.
- Enter disability information.
- Document disability accommodations.
- Run the ITA Disability report.

Pages Used to Track Disabilities

Page Name	Object Name	Navigation	Usage
Accommodation Type Table	ACCOM_TYPE_TABLE	- Set Up HRMS, Product Related, Workforce Administration, Labor Relations, Accommodation Type - Workforce Monitoring, Meet Regulatory Rqmts (requirements), Define Regulatory Rqmts (requirements) Data, Accommodation Types, Accommodation Type Table	Define the types of workplace accommodations your company or organization makes for disabled employees.
Disability	DISABILITY	Workforce Administration, Personal Information, Disability, Disabilities, Disability	Enter disability information. Indicate if a worker is disabled and record details of the disability.
Accomm Request (accommodation request)	ACCOMM_REQUEST	Workforce Administration, Personal Information, Disability, Disabilities, Accommm Request	Enter accommodation requests an employee or applicant makes of your organization. You can also enter diagnosis codes for employee disabilities.
Accomm Option (accommodation option)	ACCOMM_OPTION	Workforce Administration, Personal Information, Disability, Disabilities, Accommm Option	Enter the options that the organization or the person with a disability is considering in order to resolve each accommodation request.
Accomm Job Task (accommodation job task)	ACCOMM_JOB_TASK	Workforce Administration, Personal Information, Disability, Disabilities, Accommm Job Task	Enter the job tasks that you are accommodating, classified by job code and, where necessary, by location. If you create essential job tasks in the Job Code Task Table, you can enter multiple job tasks for each accommodation.
(DEU) Heavily Disabled	RUNCTL_PER039GR	Workforce Administration, Personal Information, Disability, Heavily Disabled GER	Run the Heavily Disabled report (PER039GR). This prints a list of heavily disabled employees and additional information about their disabilities.

Page Name	Object Name	Navigation	Usage
(DEU) Heavily Disabled Equaliz (heavily disabled equalization)	RUNCTL_PER040GR	Workforce Administration, Personal Information, Disability, Heavily Disabl Equalizatn GER	Run the Heavily Disabled Equalization report (PER040GR). This report calculates the required number of heavily disabled employees and the equalization amount of money if the required number of heavily disabled employees is not fulfilled.
(ITA) Disability Report	RUNCTL_PER060	Workforce Administration, Personal Information, Disability, Disability Report ITA	Run the Disability Report - ITA (PER060). This run control page runs the Annual, Name List, or Disability Statistics reports.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, “(GBR) (USA) (USF) Meeting Disability Regulatory Requirements,” Managing Accommodation Data

Entering Disability Information

Access the Disability page.

Disability
Accomm Request
Accomm Option
Accomm Job Task

Grün,Alex
Employee
EmpID: KD0003

☐ Disabled

+ Switzerland

Disability
Find | View All
First 1 of 1 Last

*Effective Date: 11/18/2002
Handicap Percent:

+ -

+ Germany

Disability
Find | View All
First 1 of 1 Last

*Effective Date: 11/18/2002
*Disabled Type: Not Disabled
Handicap Percent:
Disabled Position Count:
Evaluate:
Card No.:
Card Issue Date:
Exp. Date:
Disability Status Office:
City:
Postal Code:

+ -

Disability page (1 of 4)

Spain

Disability

Find | View All First 1 of 1 Last

Effective Date:

Disability Type:

Handicap Percent:

☐ Help to Go to Work

Evaluate:

Card No.:

Card Issue Date:

Exp.Date:

Disability Status Office:

City:

Postal Code:

France

Disability

Find | View All First 1 of 1 Last

Disability Type:

Begin Date:

End Date:

Title Number:

Notification Date:

Known as COTOREP

COTOREP Category:

☐ Previous Placement

Previous Placement Type:

Work Accident/Prof. Disease

☐ Work Accident

☐ Disease

Prof. Dis.:

Disability Rate:

Comment:

Disability page (2 of 4)

▼ **United Kingdom**

Registered Disabled Number: Disability:

▼ **Italy**

Disability: Disability Percentage:

▼ **Japan**

Disability Code: Worker Comp Disability Grade:

Disability Grade: WC Injury and Sickness Grade:

Comment:

▼ **Netherlands**

Disability Find | View All First 1 of 1 Last

*Effective Date: 11/18/2002

Handicap Percent: ☐ Young Handicapped

▼ **USA**

☐ Disabled Veteran

Disability page (3 of 4)

▼ **New Zealand**

Disability Find | View All First 1 of 1 Last

Effective Date: 11/18/2002

Disability: ☐ Disability Program

Disability Note:

▼ **Australia**

Australian Public Service

☐ Information Not Given

Disability page (4 of 4)

Track information regarding employee disabilities using the Disability component, which consists of the Disability page and the three Accommodation Data pages. Using these pages, record information regarding disabled employees or workers, and the impact on accommodation requirements for your organization. The information can also be used for regulatory reporting and protecting your organization from claims of disability discrimination.

Disabled

Select if the employee is disabled.

(CHE) Switzerland

Handicap Percent Enter a percentage of disability from 0 to 100.

(DEU) Germany

Use this group box to track employee disability information that your company needs to demonstrate compliance with the Handicapped Workers Act of 1961. For your company's purposes, the act defines a handicapped person as someone who is registered as handicapped and who is disabled to the degree that it impacts their earning capacity. When registered as handicapped, the individual is issued a disability card, and your company must track the disability card number, who issued the card, the issue date, and the expiration date.

Disabled Type Identify the employee's disability type.

Handicap Percent Enter the degree of the disability.

Disabled Position Count Enter the degree to which this employee's disability can be applied to the total number of positions filled by disabled employees. Not every disabled employee may count as a full disabled position.

Evaluate Enter the date the person's disability was evaluated or reviewed. The evaluation date can be different from the effective date for the disability entry. To maintain a history of evaluation date records, such as past and future evaluations, insert additional data rows and use the scroll bar to navigate between rows.

Card No., Card Issue Date, and Exp. Date (disability card number, card issue date, and card expiration date) Enter the employee's disability card number, card issue date, and card expiration date.

Disability Status Office For each disability card, enter the disability status office that issued the card.

(ESP) Spain

Disability Type Select a disability type:

- *Non Disability* (none)
- *Physical Disability*
- *Psychological Disability*
- *Sensorial Disability*

Handicap Percent Spanish law requires you track a disabled worker's percentage of disability. Enter a percentage from 0 to 100.

Help to Go to Work Select if the employee needs physical assistance to go to work. This check box is available only to employees whose disability percentage is between 33% and 65% and is used to calculate a tax deduction for that employee.

Evaluate Enter the date when the disability was evaluated.

Card No. (card number), Card Issue Date, and Exp. Date (expiration date)	The Spanish government gives people with disabilities a card that certifies their percentage of disability. Enter the card number, the date when the disability card was issued, and the disability card's expiration date.
Disability Status Office	Select the office in charge of monitoring the employee's disability status.

(FRA) France

Use this group box to track employee disability information that your company needs to demonstrate compliance with French regulations regarding disability hiring quotas, and to provide notifications to the disabled employee's social security commission, or COTOREP (Commission Technique d'Orientation et de Reclassement Professionnel).

Disability Type	Indicate the employee's disability type, which identifies whether the employee is classified by COTOREP as disabled or instead collects a financial stipend from the social security commission for some other similar reason. These reasons may include married widows, orphans, spouses of a disabled persons, and war widows. This information is tracked so your company can complete the required report of this information in a manner similar to the French Disability Report.
Title Number	Enter the employee's disability number assigned by the COTOREP.
Begin Date	Enter the date the disability started.
End Date	If the disability wasn't permanent, enter the disability end date.
Notification Date	Record the date your company notified the social security commission that you hired the employee.
Disability Rate	In the specific case of a disability due to a work accident or a professional disease, the National Social Security Administration (not COTOREP) assigns a percentage of disability to the employee. The purpose of this percentage is to enable a calculation for an allowance paid by National Social Security Administration. An employee can be recognized as a disabled person by COTOREP and also be a victim of a work accident or disease. When applicable, enter the percentage of disability (0 to 100 percent).

(FRA) Known as COTOREP (Les Commissions Techniques d'Orientation et de Reclassement Professionnel)

When you first open the page, the fields in this group box are unavailable for entry. If you select *COTOREP* as the Disability Type, the fields become available.

COTOREP Category	Enter the level of severity of the employee's disability, as defined by the social security commission: <i>COTOREP A</i>: Light disability. <i>COTOREP B</i>: Medium disability. <i>COTOREP C</i>: Severe disability.

Previous Placement	Select to indicate that the employee had a prior disability placement through COTOREP. If they didn't, clear the check box.
Previous Placement Type	If the employee had a previous placement, indicate the previous placement type.

(FRA) Work Accident/Prof. Disease

When you first open the page, the fields in this group box are unavailable for entry. If you select *WrkAcc/Dis* (work accident/disabled) as the Disability Type, the fields become available.

Work Accident and Disease	Select whether the disability is the result of a work accident or a disease.
Prof. Dis. (professional disease)	If the disability is the result of a disease, select the type of disease.

(GBR) UK

Use this group box to track disability data for your U.K. employees and to demonstrate your compliance with the fair hiring and employment provisions of the Disability Discrimination Act of 1995.

Registered Disabled Number	Enter the employee's Registered Disabled Number.
Disability	Select the employee's disability type.

(ITA) Italy

Disability	Select the employee's disability type.
Disability Percentage	Enter the employee's disability percentage, as determined by the examining doctor.

(JPN) Japan

Use this group box to track an employee's disability category and grades. This information is used for regulatory and tax-reporting purposes.

Disability Code	Enter the employee's disability code (values are legal disability categories set by the Ministry of Labor): <i>Disabled</i> , <i>Heavily disabled</i> , <i>Heavy mental disorder</i> , and <i>Mental disorder</i> .
Disability Grade	Select a value from Grade 1 through Grade 7.
Worker Comp Disability Grade (workers' compensation disability grade)	Select a value from Grade 1 through Grade 14.
WC Injury and Sickness Grade (workers' compensation injury and sickness grade)	Select a value from Grade 1 through Grade 3.

(NLD) Netherlands

Use this group box to record disability information for your workforce, and then use this information to document compliance with regulations under the Disabled Employees Act of 1985 (Wet Arbeid Gehandicapte Werknemers).

Handicap Percent	Enter the percentage degree to which the employee is handicapped.
Young Handicapped	Select to indicate the employee qualifies for the tax reduction rule for young handicapped people (Wet arbeidsongeschiktheidsvoorziening jonggehandicapten, Wajong).

(USA) USA

Disabled Veteran	Select only if the employee is a disabled veteran.

(NZL) New Zealand

Disability	Select the employee's disability type. These values come from the NZL Disability Table.
Disability Program	Select if there is an association between the employee and a disability program.
Disability Note	Enter additional comments about the disability.

(AUS) Australia

Information Not Given	Select if employee disability information is not provided.

Documenting Disability Accommodations

Use the three accommodation data pages—Accomm Request, Accommm Option, and Accommm Job Task—to track the data you need to document that your company doesn't have discriminatory practices against people with disabilities. When employees or applicants request that you make accommodations to enable them to perform job tasks, you can track all the steps involved in resolving those requests.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, “(GBR) (USA) (USF) Meeting Disability Regulatory Requirements,” Managing Accommodation Data

(ITA) Running the ITA Disability Report

Access the Disability Report page.

Disability Report page

- Annual** Select this option if you want to run the annual report, listing the number of disabled employees sorted by disability type and gender.
- Name List** Select this option if you want to run the report listing the names of disabled employees by location and gender.
- Statistics** Select this option if you want to run the report listing by location and the number of disabled and able-bodied employees. Part and full-time disabled employees are counted as one. Part-time, able-bodied employees are counted using their full time equivalent (FTE) value. If an able-bodied employee has an FTE value of 0.5, then that employee is counted as 0.5 on this report. Full-time, able-bodied employees are counted as 1.
- SetID** Select the setID of the company on whose disability statistics you are reporting.
- Location Code** Select the location code of the location on whose disability statistics you are reporting.

Handling Company Credit Cards

In PeopleSoft Human Resources, you can identify company credit cards and then assign those cards to employees.

This section discusses how to:

1. Enter credit card vendors.
2. Assign company credit cards to employees.

Prerequisites

You must have defined credit card types on the Translate table before entering credit card vendors.

Pages Used to Handle Company Credit Cards

Page Name	Object Name	Navigation	Usage
Credit Card Vendor	CC_CARD_TBL	Set Up HRMS, Product Related, Workforce Administration, Credit Card Vendors	Enter vendors of credit cards you'll assign to employees. A vendor that you identify here can be linked to an actual vendor in the Accounts Payable Vendor table.
Credit Card Data	CC_CARD_DATA	Workforce Administration, Job Information, Credit Card	Assign company credit cards to employees.

Entering Credit Card Vendors

Access the Credit Card Vendor page.

Credit Card Vendor	
SetID: SHARE	Credit Card Vendor: K003
Credit Card Vendor Find View All First 1 of 1 Last	
*Effective Date:	01/01/1980 *Status: Active
*Description:	Bank of America
*Short Desc:	BofA
Vendor ID:	KUBOFA BOFA-001
Corporate Number:	00000000000000000008
	☒ Bill Includes Tax if Applied
Grace Period	Days After Billing Date

Credit Card Vendor page

Vendor ID Enter in the vendor ID.

Corporate Number Enter your company's corporate number. This isn't a credit card number.

Bill Includes Tax if Applied Select if the bill includes tax.

Grace Period ___ Days Enter the number of days allowable after the billing date to
After Billing Date avoid additional charges.

Assigning Cards to Employees

Access the Credit Card Data page.

Credit Card Data	
Puddephatt, Leo Employee EmpID: K0G006	
Credit Card Data Find View All First 1 of 1 Last	
*Business Unit:	GBIBU
*Credit Card Vendor:	K003 Bank of America
*Cardmember Number:	1234567890123457890
Card Type:	Visa
Dt Issued:	11/11/2002
Limit Amount:	5000.00
Limit Per Trans:	
Function:	Procurement Card
*Expiration Date:	11/28/2003
Currency:	USD
Bill To:	Company

Credit Card Data page

Credit Card Vendor	Select the card's vendor.
Cardmember Number	Enter the card number.
Card Type	Select the card type.
Function	Select the main function for this card (for example, debit card, phone card, or corporate card).
Dt Issued (date issued)	Enter the date the card was issued.
Expiration Date	Enter the date the card expires.
Limit Amount	Enter the credit card limit amount.
Limit Per Trans (limit per transaction)	Enter the limit amount per transaction.
Bill To	Select whom to bill for this credit card.

Handling Company Property

This section discusses how to:

- Identify company property.
- Assign values to company property.
- Assign company property to employees.

Pages Used to Handle Company Property

Page Name	Object Name	Navigation	Usage
Company Property - Company Property	COMPANY_PROP_TBL1	Set Up HRMS, Product Related, Workforce Administration, Company Property, Company Property	Identify company property, such as vehicles, computer equipment, tools, or uniforms.
Property Value	COMPANY_PROP_TBL2	Set Up HRMS, Product Related, Workforce Administration, Company Property, Property Value	Assign values to company property.
Job Information - Company Property	COMPANY_PROPERTY	Workforce Administration, Job Information, Company Property	Assign company property to employees.

Identifying Company Property

Access the Company Property - Company Property page.

The screenshot displays the 'Company Property' form within the HRMS application. The form is titled 'Company Property' and includes a navigation bar with 'Find | View All | First | 1 of 1 | Last'. The form fields are as follows:

- Property Code:** F001
- *Effective Date:** 06/11/1993
- *Status:** Active
- *Description:** Toshiba 6400 Portable
- Short Description:** Tosh 6400
- Property Type:** Computer Equipment
- Make / Manufacturer:** Toshiba
- Model:** 6400

Company Property - Company Property page

- Property Code** Displays the property code you set for this item.
- Property Type** Select a type of property, such as *Vehicle* or *Computer Equipment*.
- Make/Manufacturer** Enter the make and manufacturer for this item.
- Model** Enter the model.

Car Identification

If you select *Vehicle* as the Property Type, this group box appears in place of the Make/Manufacturer and Model fields.

- Car Identification** When you enter a car ID, the system automatically completes the Registration Number, Make/Model, and Color fields based on the values stored for that car ID.

- Make/Model

Enter the make/model for this item.
- Model

Enter the model.
- Registration Number

Enter in the car’s registration number.
- Color

Enter in the car’s color.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Company Cars, “Getting Started With PeopleSoft Human Resources Administer Company Cars”

PeopleSoft 8.8 Human Resources PeopleBook: Monitor Health and Safety, “Tracking Personal Data for People Involved in Incidents,” Entering Non-Employee Data

Assigning Values to Company Property

Access the Property Value page.

Company Property

Property Value

Property Value

Find | View All

First

1 of 1

Last

Property Code:

F001

Toshiba 6400 Portable

Effective Date:

06/11/1993

Status: Active

+

-

Business Unit:

PSFED

Dept Id (Issued To):

Serial Number:

T64-899056788

Property Value:

8,000.00

USD

Asset Number:

100

Property Value page

- Dept ID (Issued To):

Enter the identification number of the department to which the property was issued.
- Serial Number

Enter the serial number.
- Property Value

Enter the value of the property and the currency you are using.
- Asset Number

Enter the asset number.

Assigning Company Property to Employees

Access the Job Information - Company Property page.

Company Property

Buckalew,Ginger

Employee

EmplID: K0G005

Property Assignment

Customize | Find | View All |  First 1-3 of 3 Last

Property	Serial Number						
	Property Code	Description	Issue Date	Date Returned			
1	F001 	Toshiba 6400 Portable	11/18/2002 				
2	F011 	Cellular Phone	11/18/2002 				
3	KU00000009 	External Hard Drive	11/18/2002 				

Job Information - Company Property page

Property Code Enter the property code for the item you've assigned to the employee.

Issue Date Enter the date you issued the property to the employee.

Date Returned After the employee returns the property, enter the date it was returned.

Serial Number Enter the serial number of the item you've assigned to the employee.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Monitor Health and Safety, "Tracking Personal Data for People Involved in Incidents," Entering Non-Employee Data

Tracking Dependent and Beneficiary Data

This section provides an overview of dependent and beneficiary data and discusses how to:

- Enter dependent/beneficiary name information.
- Enter dependent address information.
- Enter dependent and beneficiary information.
- Enter information about court-ordered benefits for dependents.
- View an employee's beneficiaries and dependents.
- Enter dependent citizenship and passport information.
- Enter dependent visa and permit information.

Understanding Dependent and Beneficiary Data

Use the Dependent Information component to record important information for dependents that may accompany an employee on an international assignment or international travel. You must also have these pages set up prior to enrolling employees in specific benefit programs.

The Name and Address pages define the relationship of the person to the employee and determine whether the person is a dependent, beneficiary, or both. This affects the person's eligibility to be enrolled in health benefits or to be assigned as a beneficiary in certain benefit plans.

The Personal Profile page defines the personal information about the person. This data also affects whether the person is eligible for benefits.

Pages Used to Track Dependent Identification Data

Page Name	Object Name	Navigation	Usage
Name	DEPEND_BENEF1	- Workforce Administration, Personal Information, Dependent Information, Name - Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Name	Enter or update information about a dependent's name.
Address	DEPEND_BENEF_ADDR	- Workforce Administration, Personal Information, Dependent Information, Address - Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Address	Enter or update information about a dependent's address.
Personal Profile	DEPEND_BENEF2	- Workforce Administration, Personal Information, Dependent Information, Personal Profile - Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Personal Profile	Enter or update information about a dependent.
Dependent/Beneficiary Riders	DEPBEN_RIDERS	Click Riders/Orders on the Dependent Information - Personal Profile page.	Enter detailed information about the court-ordered benefit for the specified dependent or beneficiary.
Personal Profile: Phone Numbers	DEP_BENEF_PHON_SEC	Click Phone Numbers on the Dependent Information - Personal Profile page	Enter additional dependent/beneficiary phone numbers.

Page Name	Object Name	Navigation	Usage
(USA) Federal Medicare Flags	BN_DEPBEN_EFFDT	• Workforce Administration, Personal Information, Dependent Information, Federal Medicare Flags • Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Federal Medicare Flags	Enter Federal Medicare information.
Dependent/Benef	DEPEND_BENEF_SUMM	• Workforce Administration, Benefit Information NLD, Review Benefits, Dependent/Beneficiary Summary, Dependent/Benef • Benefits, Employee/Dependent Information, Review Dep/Ben Summary, Dependent/Benef	View an employee's beneficiaries and dependents.
Depdnt Identification Details - Depdnt Citizenship/Passport	CITIZEN_PP_DEP	Workforce Administration, Personal Information, Depdnt Identification Details, Depdnt Citizenship/Passport	Enter or update dependent citizenship and passport data.
Depdnt Identification Details - Depdnt Visa/Permit Data	VISA_PERMIT_DEP	Workforce Administration, Personal Information, Depdnt Identification Details, Depdnt Visa/Permit Data	Enter or update dependent visa and permit data.

Entering Dependent/Beneficiary Name Information

Access the Dependent Information - Name page.

The screenshot displays the 'Dependent/Beneficiaries' form. At the top, there are tabs for 'Name', 'Address', 'Personal Profile', and 'Federal Medicare Flags'. The employee's name 'Lewis, Douglas' and 'Employee' title are shown, along with 'EmpID: KU0001'. The 'Dependent/Beneficiaries' section has a 'Find | View All' link and a '1 of 2' indicator. The dependent's ID is '01', the relationship is 'ExSpouse', and the type is 'Benef'. The 'Name' section shows 'Format Using: USA' and a 'Refresh the Name Field' button. The 'Person Name' section includes fields for 'Prefix: Miss', 'First: Lydia', 'Middle: Park', 'Last: Lewis', and 'Suffix:'. The 'Name' field is populated with 'Lewis, Lydia Park'. Below this, there is a section for 'French Public Sector' with checkboxes for 'Civil Servant Status' and 'Same Public Service', and fields for 'Employee ID of the Dependent' and 'Employer Name'.

Dependent Information - Name page

The system displays the name and the employee ID for the employee you entered to access this page.

Note. There is no effective date for dependent/beneficiary data because dependents and beneficiaries become effective when you enroll them in a benefit plan.

Dependent/Beneficiary ID	The system assigns the Dependent/Beneficiary ID. You can change it, although you can't have duplicate IDs for dependents or beneficiaries of the same employee. You can, however, use these same IDs for a different employee's dependents and beneficiaries.
Relationship to Employee	Enter the dependent/beneficiary's relationship to the employee. If you've set up the Dependent Relationship table, the system automatically completes the Relationship to Employee field according to the relationships established in the table.
DepBenef Type (dependent beneficiary type)	Select the type of dependent/beneficiary. Your selection determines whether you can enroll this person into a benefit plan as a dependent or assign this person as a beneficiary. If you have set up the Dependent Relationship table, the system uses that information to populate and validate this field.

Benef: Beneficiary only.

COBRA Only: COBRA Dependent/Beneficiary only.

Dep/Benef: Dependent and beneficiary. If you plan to enroll the person as a dependent *and* assign the person as a beneficiary, you must select this option.

Dependent: Dependent only.

Estate: If the beneficiary of a life plan is the estate of an employee, enter this value.

None: The person is neither a dependent nor a beneficiary. This option is typically used when the person is a co-owner of an U.S. Savings Bond or to make a person ineligible to participate in a benefit plan. Also use it to inactivate an individual from participating in benefit enrollments.

QDRO Emp: Used for PeopleSoft Pension Administration.

QDRO Rec: Used for PeopleSoft Pension Administration.

Note. (USA) (CAN) The values *Cobra Only*, *None*, *QDRO Emp*, and *QDRO Rec* are Canadian and United States values only.

Note. When running a calculation, the system determines if an employee is married by looking at the dependent/beneficiary table to see if there is a dependent identified as the spouse. It is possible for the dependent/beneficiary pages to show more than one spouse, to show a former spouse as a current spouse, to show no spouse even if the employee's marital status is married, or to show a spouse even though the employee's marital status is single. These and other inconsistencies in the dependent/beneficiary data can cause problems with your pension calculations. It's best to verify dependent/beneficiary information when calculating pension benefits. If you need to update the information, see "Entering Dependent and Beneficiary Information."

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, "Entering Dependent and Beneficiary Information," Entering Dependents and Beneficiary Information

Entering Dependent Address Information

Access the Dependent Information - Address page.

The screenshot displays the 'Dependent/Beneficiaries' page for Employee KU0001 (Lewis, Douglas). The dependent is Lydia Park (ID: 01), an ExSpouse (DepBenef Type: Benef). The address is 2091 Ascot Drive, Apt. 25, Moraga, CA 94556, Contra Costa. The phone number is 925 6311234. The page includes tabs for Name, Address, Personal Profile, and Federal Medicare Flags. The 'Address' tab is active, showing the 'Contact Address' and 'Contact Phone' sections.

Dependent Information - Address page

The employee's name and ID, as well as this dependent or beneficiary's ID, relationship to the employee, and dependent or beneficiary type appear at the top of the page.

Same Address as Employee and Address Type

Select if the dependent has the same address information as the employee, and then select the employee's address type that matches the dependent/beneficiary's address. If selected, you don't need to complete any of the address fields.

Same Phone as Employee and Phone Type

Select if the dependent has the same phone information as the employee and then select the employee phone type that is the same as this beneficiary's. If selected, you don't need to complete any of the phone fields. A beneficiary can have the same address as the employee but a different phone number.

Edit Address

Click to enter or edit the dependent's contact address information.

Contact Phone

Enter the dependent's contact phone information in this group box.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Setting Up Local Country Functionality," (NLD) Loading Dutch Postal Codes

Entering Dependent and Beneficiary Information

Access the Dependent Information - Personal Profile page.

Name	Address	Personal Profile	Federal Medicare Flags
Lewis,Douglas		Employee	EmplID: KU0001
Personal Profile Find View All First 1 of 2 Last			
Dependent/Beneficiary ID: 01		Name: Lewis,Lydia Park	
Relationship to Employee: ExSpouse		DepBenef Type: Benef	
Birthdate: 12/21/1962		Birth Country: USA Birth State: CA	
☐ Eligible for CSB		Birth Location: Los Angeles	
*Gender: Female		Student ☐ Disabled ☐ Smoker ☒	
*Marital Status: Divorced		Student Status Date:	
Marital Status Date: 05/14/1992			
Occupation:		Medicare Entitled Date:	
Date of Death:		Riders/Orders ☐ Phone Numbers	
Belgium			
Fiscal Data Find View All First 1 of 1 Last			
Effective Date: 11/19/2002		☐ Fiscally Dependent	
Fiscal Situation Spouse:		☐ Fiscally Disabled	
Profession Category Spouse:		☐ Orphan	

Dependent Information - Personal Profile page (1 of 3)

France	
Personal Status France Find View All First 1 of 1 Last	
*Effective Date:	
☐ Family Supplement ☐ Garnishment ☐ AFB Allowance ☐ CHIC ☐ Schooling	
☐ Holiday Premium ☐ Status 7 ☐ Status 8 ☐ Collective Agmt ☐ IJSS Calc.	
Group Box	
United Kingdom	
☐ Eligible for Parental Leave	
☐ Adopted Dependent	
Adoption Date:	
☐ Certificate(s) Verified	

Dependent Information - Personal Profile page (2 of 3)

Brazil

Data Find | View All First 1 of 1 Last

*Effective Date: 11/19/2002

☐ Student Education Level: Analphabete ☐ University or Technical Level

☐ Vaccination Certificate ☐ Disabled

Family Allowance

Termination Cd.: Termination Dt.:

Birth Data Find | View All First 1 of 1 Last

Office Name:

Registry Number:

Book Number:

Page Number:

Date Received:

Vaccination Data Find | View All First 1 of 1 Last

*Date:

Type:

*Dose: First

National ID Customize First 1 of 1 Last

Country	*National ID Type	Description	National ID	Primary ID
USA	PR	Social Security Number	557-45-8963	☒

Dependent Information – Personal Profile page (3 of 3)

- Birthdate** Enter the dependent/beneficiary's birthdate. Certain benefit plans, such as life insurance, require the birthdate to determine an individual's eligibility.
- Birth Country** Enter the country in which the dependent/beneficiary was born. Depending on the country you enter, additional fields may appear requiring more data entry.
- Birth Location** Enter a city and/or county to further define the place in which the dependent/beneficiary was born.
- Eligible for CSB** If you are entering dependent/beneficiary information for a Canadian employee, select this check box to indicate that the dependent or beneficiary is an eligible registrant for an employee purchasing Canadian Savings Bonds (CSBs). The PeopleSoft Payroll-CSB Registrant page verifies the selection of this check box.
- Marital Status** Enter the dependent/beneficiary's marital status.
- Marital Status Date** When an individual undergoes a change in marital status, enter the date of the change. This is critical for determining eligibility for benefits enrollment.

Student	Select if the dependent/beneficiary is a student.
Student Status Date	When the dependent's student status changes (in other words, when you select or clear the Student check box), enter the date of the change. This is critical for determining eligibility for benefits enrollment.
Disabled	Select if the dependent/beneficiary is disabled.
Smoker	Select if the dependent/beneficiary smokes. The Smoker check box is necessary for dependents enrolled in benefit plans using calculation rules. The system calculates age-graded rates for individuals differently depending upon whether they smoke.
Occupation	Enter the dependent/beneficiary's occupation, if known.
Medicare Entitled Date	Enter the date upon which the dependent/beneficiary will become eligible for Medicare coverage.
Date of Death	When the dependent/beneficiary dies, enter the date of the death.
Riders/Orders	Click to access the Dependent/Beneficiary Riders page.
Phone Numbers	Click to access the Dependent Information - Personal Profile: Phone Numbers page.

National ID

Use this group box to enter the dependent or beneficiaries' national identification number. Dependents and beneficiaries with citizenship in more than one country can have more than one national ID. Add as many rows as required.

Country	Select the country that issued the dependent's national ID.
National ID Type	The system populates this field automatically with the default value you established for this country on the National ID Type Table Page. You can select another valid type.
National ID	Enter the dependent's national ID number. The system automatically checks the format of your entry against the default format you entered on the National ID Type Table page.
Primary ID	Select if the national ID is the dependent's primary ID. If this is the only data row for this person, the system selects the check box by default. You can override this default.

(BEL) Belgium

Fiscally Dependent	Select if the employee is fiscally responsible for the dependent.
Fiscal Situation Spouse	Select the appropriate fiscal situation from the list.
Fiscally Disabled	Select if applicable.
Profession Category Spouse	Select the appropriate category from the list.
Orphan	Select if applicable.

(FRA) France

Use this group box to store information that can be passed on to your payroll system for payroll processing.

Family Supplement

For numerous families, payroll calculates the family allowance amount that your organization gives to an employee based on their family dependents. This calculation is based on the number and type of employee dependents. Select this check box to indicate whether the corresponding dependent has to be taken into account in the calculation of the supplemental family allowance.

Garnishment

This option deals with court orders requiring that an employee's wages be garnished. When an employee is under a court order, payroll can calculate the percentage and amount of the employee's salary that is frozen for every pay period that has to be transferred to the relevant government agency.

Depending on the number of dependents, this amount is reduced. The greater the number of dependents is, the lower the percentage of frozen salary. Select this check box to indicate that the corresponding dependent has to be taken into account in the calculation of the frozen garnishment amount.

AFB Allowance (French Banking Association allowance)

The French Banking Association delivers a special allowance based on the number of dependents. Select to indicate that the corresponding dependent has to be taken into account in the calculation of this allowance.

CHIC

CHIC is a medical insurance company that employees can opt to use to supplement their medical insurance coverage. This insurance company delivers a special allowance based on the number of dependents. Select this check box to indicate that the corresponding dependent has to be taken into account in the calculation of this allowance.

Schooling

See Family Supplement.

Holiday Premium

See Family Supplement.

Status 7 and Status 8

Configure these fields to capture additional payroll related status information.

(GBR) United Kingdom**Eligible for Parental Leave**

Select if the dependent qualifies the employee for Parental Leave. Select the Disabled check box on the top page if it also applies here.

Adopted Dependent

Select if the employee adopted the dependent.

Adoption Date

If adopted, enter the adoption date.

Certificate(s) Verified

Select to indicate that appropriate certificates have been provided to verify this dependent information.

(BRA) Brazil**Student**

Select to indicate the dependent is a student. Employees receive income tax benefits for all students up to 21 years old. If the dependent is a student and is less than six years old, the employee should provide a vaccination certificate to the company to receive the income tax benefit.

University or Technical Level	Select to indicate the dependent is a student at the university or technical level and the employee can receive the income tax benefit for the dependent for additional years (for students up to 24 years old).
Vaccination Certificate	Select if you have received the dependent's vaccination certificate. This information is used for reporting purposes.
Disabled	Select to indicate the dependent is disabled and the employee can receive the family allowance and income tax benefits for the dependent for additional years.
Termination Cd (termination code)	Enter the reason code for the family allowance termination. <i>Child Abandonment:</i> Abandonment of child <i>Dependent exceeds ceiling:</i> Dependent's age exceeds maximum age. <i>Court Decision:</i> Court decision (in case of divorce or separation) <i>Dependent's Death:</i> Dependent's death <i>End Disability:</i> Disability ended <i>Child Custody:</i> Custody has been awarded to the other parent. <i>Termination:</i> Termination
Termination Dt (termination date)	Enter the family allowance termination date.

Enter information from the dependent's birth certificate in the Birth Data group box. This information is used for reporting purposes.

Enter the type of vaccination, the dose, and the date received for each vaccination on the dependent's vaccination certificate in the Vaccination Data group box. This information is used for reporting purposes.

See Also

PeopleSoft 8.8 Benefits Administration PeopleBook, "Running the PeopleSoft Benefits Administration Process," Entering Dependent or Beneficiary Data

Entering Information About Court-Ordered Benefits for Dependents

The Dependent/Beneficiary Riders page enables you to enter any court-ordered benefits or spousal waivers. This enables the system to validate any changes or omissions in benefit enrollments with a recorded rider. When an employee enrolls in a benefit plan and there is a court-ordered mandate specifying that a benefit be provided, the system will not complete the enrollment.

Access the Dependent/Beneficiary Riders page.

Dependent/Beneficiary Riders

EmplID: KU0001 Dependent/Beneficiary ID: 01

Riders/Orders Find | View All First 1 of 1 Last

*Plan Type:

*Start Date:

*Sequence: Status ☒ Active ☐ Inactive

Exception Type:

State: End Date:

Court Order Number:

Comment:

OK Cancel

Dependent/Beneficiary Riders page

Plan Type	Enter the type of plan to which the court order relates.
Start Date	Enter the date on which the court order becomes effective.
Seq (sequence)	Prioritizes court orders when you have more than one that takes effect on the same day. Enter a number that indicates which court orders take precedence over others. If there is only one court order, enter a sequence of <i>1</i> .
Status	Select whether the court order is <i>Active</i> or <i>Inactive</i> . This is typically used to void a court order before the end date takes effect. If the status is <i>Inactive</i> , the system won't enforce any validations against this court order.
Exception Type	Select whether this is a court order (a legal document that grants a dependent the right to receive benefit coverage), spousal waiver (document that formally waives a spouse's claim to a minimum beneficiary allocation of funds from a life insurance policy or savings plan), or neither.
End Date	Enter the date on which the court order ends. When the court order expires, the system won't enforce any validations against this court order.
Court Order Number	Enter the official number issued by the state for this court order.

(USA) Entering Federal Medicare Data

Access the Federal Medicare Flags page.

The screenshot displays the 'Federal Medicare Flags' section of a web application. At the top, there are tabs for 'Name', 'Address', 'Personal Profile', and 'Federal Medicare Flags'. Below the tabs, the employee's name 'Lewis, Douglas' and 'Employee' status are shown, along with the 'EmplID: KU0001'. The main heading is 'Federal Medicare Indicators'. Below this, there is a section for 'Dependent/Beneficiaries' with a table showing one entry: 'Lewis, Lydia Park' with ID '01' and relationship 'ExSpouse'. Below the table, there is a 'Medicare Indicators' section with a date picker for 'Effective Date' set to '11/19/2002'. There are two checkboxes: 'Medicare A Indicator' and 'Medicare B Indicator', both of which are currently unchecked.

Federal Medicare Flags page

Medicare A Indicator and **Medicare B Indicator** Select if the dependent is enrolled in Medicare A or Medicare B.

(NLD) Viewing an Employee's Dependents and Beneficiaries

Access the Dependent/Benef page.

Dependent/Beneficiary Summary

This group box displays a summary of all dependent/beneficiary data for an employee.

ID	This column displays the ID of the dependent or beneficiary.
Name	This column displays the name of the dependent or beneficiary.
Depend/Benef (dependent/beneficiary)	Indicates whether the person is a dependent or beneficiary.
Relationship	Describes the relationship of the dependents and beneficiaries to the employee.

Note. Over time, changes occur and you need to terminate dependent enrollments or beneficiary statuses. Remember, you enroll dependents and assign beneficiaries when you enroll employees. As with employees, to terminate a dependent enrollment or beneficiary status, you must enter a row of data with the termination date. Don't make such a change using the Dependent/Beneficiary Data page. Make the change using the benefit detail page for the benefit in question.

Warning! If you delete dependent/beneficiary data using the Dependent/Beneficiary Data pages, you destroy historical data. Once you change enrollment data, it won't matter that the dependent or beneficiary data is available here. It must remain if your system is to provide correct historical information.

Entering Dependent Citizenship and Passport Information

Access the Depdnt Identification Details - Depdnt Citizenship/Passport page.

The screenshot displays the 'Depdnt Citizenship/Passport' page for employee Lewis, Douglas (EmplID: KU0001). The page is divided into several sections:

- Dependent Info:** Shows the dependent's name as Lewis, Lydia Park and their ID as 01. Navigation links for 'Find', 'View All', 'First', '1 of 2', and 'Last' are visible.
- Citizenship Details:** Shows the country as USA (United States) and the citizenship status as 1 (Native). Navigation links for 'Find', 'View All', 'First', '1 of 1', and 'Last' are visible.
- Passport Details:** Includes fields for 'Passport Number', 'Issue Date', and 'Expiration Date'. The 'Issued By' section includes fields for 'Country' (USA, United States), 'State', 'City', and 'Authority'. Navigation links for 'Find', 'View All', 'First', '1 of 1', and 'Last' are visible.
- Comment:** A text area for entering additional information.

Depdnt Identification Details - Depdnt Citizenship/Passport page

All fields on these pages are described in your benefits documentation.

Note. (DEU) If you administer a workforce in Germany, use the Visa/Permit Table to record OECD work permits for OECD nationals who want to work in a protected industry. Because permit types are keyed by country, if you track a German employee's OECD work permit information on the Identification, Visa/Permit Table in the Track Global Assignments menu, select *DEU* as the Country Code from among your valid OECD permit types.

Entering Dependent Visa and Permit Data

Access the Depdnt Visa/Permit Data page.

Enter information on this page in the same manner you enter data on the Visa/Permit Data page.

See [Chapter 8, "Entering Additional Data in Human Resources Records,"](#) [Entering an Employee's Visa/Permit Information](#), page 229.

Tracking Emergency Contacts

This section discusses how to enter emergency contact primary address and phone information.

Pages Used to Track Emergency Contacts

Page Name	Object Name	Navigation	Usage
Contact Address/Phone	EMERGENCY_CONTACT	Workforce Administration, Personal Information, Emergency Contact, Contact Address/Phone	Enter names, addresses, and primary phone information for people to contact in the event of an employee emergency.
Other Phone Numbers	EMERGENCY_CONTACT2	Workforce Administration, Personal Information, Emergency Contact, Other Phone Numbers	Record additional phone numbers at which the emergency contact can be reached, such as a work or cellular phone number.
Emergency Contacts	PRCSRUNCNTL	Workforce Administration, Personal Information, Emergency Contacts Report	Generate the Emergency Contacts report (PER004). This report lists all contacts entered on the Emergency Contact table for each employee in the system. Run the Refresh Employees Table process before running this report.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports”

Entering Emergency Contact Primary Address and Phone Information

Access the Contact Address/Phone page.

Contact Address/Phone | **Other Phone Numbers**

Lewis, Douglas Employee EmpID: KU0001

Emergency Contact Find | View All First 1 of 1 Last

*Contact Name: Lewis, Nely + -

*Relationship to Employee: Spouse ☒ Primary Contact

☒ Same Address as Employee Address Type: HOME

☒ Same Phone as Employee Phone Type: HOME

Employee's Current Address

Country: USA United States

Address: 3569 Malta Ave
Newark, NJ 07112

Employee's Phone

Phone: 973 622 1234

Contact Address/Phone page

Contact Name	Enter the name of the emergency contact person.
Relationship to Employee	Select the option that indicates the contact's relationship to the employee.
Primary Contact	Select if this is the <i>first</i> person you should try to contact in an emergency. Select for only one contact.
Same Address as Employee and Address Type	Select if the contact has the same address information as the employee and then select the employee address type that is the same as this contact's. If selected, you don't need to complete any of the address fields.
Same Phone as Employee and Phone Type	Select if the contact has the same phone information as the employee and then select the contact's employee phone type that is the same as the contact's. If selected, you don't need to complete any of the phone fields. An emergency contact can have the same address as the employee but a different phone number.
Change Country	Click to enter or edit the contact's country.
Edit Address	Click to enter or edit the contact's address.
Contact Phone	Enter the contact's phone information.

Managing Citizenship and Visa/Permit Information

This section provides a list of common elements and discusses how to:

- Define citizenship statuses.
- Define visas and work permits.
- Track employee passport and citizenship information.
- Enter an employee's visa/permit information.

Common Elements Used to Manage Citizenship and Visa/Permit Information

Expiration Date	Enter the expiration date of the visa/permit.
Issue Date	Enter the date on which the visa/permit was issued.
Issue Place	Enter the location where the visa/permit was issued.

Pages Used to Manage Citizenship and Visa/Permit Information

Page Name	Object Name	Navigation	Usage
Citizenship/Passport	CITIZEN_PASSPORT	Workforce Administration, Personal Information, Citizenship, Identification Data, Citizenship/Passport	Track passport and citizenship information for employees. Enter multiple countries of citizenship and multiple passports for employees and their dependents.
Visa/Permit Data	VISA_PERMIT_DATA	Workforce Administration, Personal Information, Citizenship, Identification Data, Visa/Permit Data	Enter an employee's visa/permit information.
Passport/Visa Expiration	PRCSRUNCNTL	Workforce Administration, Personal Information, Citizenship, Passport/Visa Expiration Audit	Generate the Passport/Visa Expiration report (PER032). This report lists employees and dependents that have passports, visas, or work permits on file that expire in 90 days of the report run date. The report is divided into two sections. The first section lists passport information including country, passport number, issue date, and expiration date. The second section lists visa and work permit information including country, visa and work permit number, type of permit, issue date, and expiration date.
Citizenship / Country / Visa	PRCSRUNCNTL	Workforce Administration, Personal Information, Citizenship, Citizenship / Country / Visa Audit	Generate the Citizenship/Country/Visa Audit report (PER033). This report lists discrepancies between employee citizenship country/status and visa data. The report displays various discrepancies found for the employee citizenship status in the Personal Data table.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports”

Tracking Employee Passport and Citizenship Information

Access the Citizenship/Passport page.

The screenshot shows the 'Citizenship/Passport' page for employee Lewis, Douglas (EmpID: KU0001). The page has three tabs: 'Citizenship/Passport', 'Visa/Permit Data', and 'Employee Photo'. The 'Citizenship/Passport' tab is active. It displays a search bar with 'Find | View All' and navigation buttons 'First', '1 of 1', and 'Last'. Below the search bar, there are two main sections. The first section, 'Citizenship/Passport', has a sub-search bar with 'Find | View All' and navigation buttons. It contains fields for '*Country:' (USA), 'Citizenship Status:' (Native), and 'Passport Information'. The 'Passport Information' section has fields for '*Passport Number:', 'Issue Date:', 'Expiration Date:', 'Country:' (USA), 'State:', 'City:', 'Authority:', and 'Comment:'. The second section, 'Singapore', has a sub-search bar and fields for 'Worker Type:' and 'Permanent Status Date:'.

Citizenship/Passport page

Citizenship Status

Indicate the worker's citizenship status. A worker's birth country and country of citizenship can be different. To track *birth* country information, use the Identity/Diversity page.

Note. (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. This information is used in DEUEV processing and DEUEV reporting for German organizations or companies doing business in Germany. DEUEV processes and reporting are available only if you are using a German compliant payroll system.

Passport Information**Passport Number**

Enter the passport number.

Authority

Enter the issuing authority, such as the U.S. Passport Agency.

See Also

PeopleSoft 8.8 Global Payroll for Germany PeopleBook, "Defining Country Data"

PeopleSoft 8.8 Human Resources PeopleBook: Track Global Assignments, "Setting Up Global Assignments"

Entering an Employee's Visa/Permit Information

Access the Visa/Permit Data page.

The screenshot displays the 'Visa/Permit Data' page for employee Lewis, Douglas (EmplID: KU0001). The page is divided into three main sections: 'Visa/Permit Data', 'Visa / Permit History', and 'Supporting Documents Needed'. The 'Visa/Permit Data' section includes fields for Country, Type, Effective Date (11/19/2002), Number, Status (Applied), Status Date (11/19/2002), Duration (Months), Issue Date, Date of Entry into Country, Issuing Authority, and Issue Place. A 'Get Supporting Documents' button is located to the right of the Type field. The 'Visa / Permit History' section is currently empty. The 'Supporting Documents Needed' section contains a table with the following data:

Sup Doc ID	Description	Request Date	Date Received
1			

Visa/Permit Data page

- Type** Select a type of visa/permit. The system prompts you with only types associated with the country you've selected.
- Get Supporting Documents** Click to have the system enter a list of the appropriate supporting documents needed to obtain the visa or permit type you entered.
- Number** Enter the visa/permit number.
- Status** Select the visa/permit status: *Applied*, *Granted*, *Renewal*, and *Renewed*.
- Status Date** Enter the date on which the status of the visa/permit changed.
- Duration** Enter the number of days, months, or years that the employee stayed in the country. Select the unit of duration (*Days*, *Months*, or *Years*) in the adjacent field.
- Date of Entry into Country** Enter the date on which the employee entered the country.
- Issuing Authority** Enter the agency that issued the visa or permit, such as the U.S. Department of State or the French Consulate.
- Supporting Documents Needed**
- Sup Doc ID** (supporting document ID) If additional documents are required for this employee to obtain the visa or permit type, select a supporting document ID.
- Request Date** Enter the date on which the documents were requested.
- Date Received** Enter the date on which the documents were received.

Note. (DEU) If you're administering a workforce in Germany, use the Visa/Permit Table to record OECD work permits for OECD nationals who want to work in a protected industry. Because permit types are keyed by country, if you're tracking a German employee's OECD work permit information on the Identification - Visa/Permit Table page in the Administer Workforce menus, select *DEU* as the Country Code to select from among your valid OECD permit types.

See Also

Chapter 4, "Setting Up Country-Specific Tables," Entering German Nation DEUEV Codes, page 26

Managing Driver's License Information

This section discusses how to enter license numbers and other driving record information.

Page Used to Manage Driver's License Information

Page Name	Object Name	Navigation	Usage
Drivers License	DRIVERS_LIC_GBL	Workforce Administration, Personal Information, Biographical, Driver's License Data	Enter license numbers or other data from an employee's driving record.

Entering License Numbers and Other Driving Record Information

Access the Drivers License page.

Drivers License

Santos, Antonio Employee EmpID: KU0010

Driver's License Information Find | View All First 1 of 1 Last

*Driver's License #: BV123465789 + -

Country: USA United States

State: CA California

Issue Location: PLEASANTON Issuing Authority: CADMV

Valid from/to: 07/14/2002 07/14/2007

Number of Violations: 0 Number of Points: 0 ☐ License Suspended

Comment:

License Type Find | View All First 1 of 1 Last

License Type: C Class C + -

Drivers License page

Driver's License # (Driver's License Number)	Enter the license number.
Issue Location	Enter the location where the license was issued.
Issuing Authority	Enter the agency that issued the driver's license, such as the Department of Motor Vehicles.
Valid from/to	Enter the dates on which the driver's license remains valid. The <i>to</i> date must be in the future.
Number of Violations	Enter the number of traffic violations cited on the employee's driving record.
Number of Points	Enter the number of points accumulated on the employee's driving record.
License Suspended	Select if the employee's driver's license is currently suspended.
License Type	Enter the type of license held by the employee.

If you need to enter more than one driver's license for an employee, add a new data row.

Entering Bank Account Information

This section discusses how to:

- Record employee bank account information.
- Enter an employee's building society roll number and name.

Pages Used to Enter Bank Account Information

Page Name	Object Name	Navigation	Usage
Bank Account Information	PYE_BANKACCT	Workforce Administration, Personal Information, Biographical, Bank Accounts	Record information about employee bank accounts. Use this information to track employee direct deposit information.
Building Society Details	PYE_BS_SP_UK	Click Other Required Information on the Bank Account Information page.	Enter an employee's building society roll number and name.

Recording Employee Bank Account Information

Access the Bank Account Information page.

Bank Account Information

Santos, Antonio Employee EmplID: KU0010

Bank Accounts Find | View All First 1 of 1 Last

Account ID: 1 Type: Status: + -

Country Code: United States

Bank ID: Wells Fargo Bank

Branch ID:

Account #:

Account Name:

*Currency Code: US Dollar

AC Account Name:

Bank Account Information page

Note. Before you can enter an employee's bank details, first set up the bank branch or building society on the Bank/Branch Table page.

Account ID	The system creates an account ID when you enter a new bank or building society account for an employee. This field is for information only.
Type	Select the type of account you are tracking.
Country Code	Enter the country where the bank account is located. When you move out of this field, the system populates the Currency Code field with the appropriate currency.
Bank ID	Enter the bank ID.
Branch ID	Enter the bank branch ID for the account.
Bld Soc ID (building society)	If <i>GBR</i> is entered in the Country Code this field replaces the Branch ID field. See details below.
Account # (account number)	Enter the account number.
Account Name	Enter the account name.
AC Account Name	Enter the alternate character account name, if applicable.

(GBR) Entering Banking Information for UK Employees

UK customers also use this page to record employees' building society account information. When you enter *GBR* in the *Country* field the Bank Branch ID field becomes the Bld Soc ID (building society ID) field. When you select a building society ID, the Other Required Information link appears on the page.

UK customers entering details of UK bank and building society accounts should enter the following information in the fields on the Bank Account Information page:

Field	UK Bank and Building Society Information
Type	Select an account type: <i>Current Account:</i> Select for a bank account. <i>Building Society Roll Number:</i> Select for a building society account. <i>Savings:</i> Not applicable to the UK. <i>Checking:</i> Not applicable to the UK.
Country Code	Enter <i>GBR</i> .
Bank ID	If the employee has a bank account, select the bank branch from the list of branches set up in the Bank table. If the employee has a building society account, leave this field blank
Bld Soc ID	If the employee has a building society account, select the building society from the list of societies set up in the Branch table. When you select a building society, the system automatically completes Bank ID with the bank that handles clearing for the selected building society. If the employee has a bank account, leave this field blank.
Account # (account number)	Enter the employee's bank account number. If you selected a building society in Bld Soc ID, the system automatically completes Account # with the building society's account at the clearing bank and makes the field unavailable for entry. Note. To enter the employee's building society account details, click Other Required Information.
Account Name	Enter the account name. If you selected a building society in Bld Soc ID, the system makes this field unavailable for entry. Click Other Required Information to display the Building Society Details page where you enter the account name.

Field	UK Bank and Building Society Information
Currency Code	The system defaults the currency code to <i>GBP</i> (Pound Sterling). Override this default if necessary.
Other Required Information	Click to display the Building Society Details page where you enter the employee's building society account details. The system does not display this link if you select a normal bank branch in the Bank ID field.

Note. For more information about the account number formats for a country, see the corresponding PeopleSoft Global Payroll local country documentation.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Setting Up Banks and Bank Branches”

(GBR) Enter an Employee's Building Society Roll Number and Name

Access the Building Society Details page.

Building Society Details

Roll Name:

Roll Number:

Building Society Details page

Roll Name Enter the roll name of the employee's building society account.

Roll Number Enter the employee's building society account number.

Tracking Volunteer Activity

This section discusses how to enter information on employee volunteer activities.

Page Used to Track Volunteer Activity

Page Name	Object Name	Navigation	Usage
Volunteer Activities	VOLUNTEER_ACTIVITY	Workforce Administration, Personal Information, Biographical, Volunteer Activities	Enter information on employee volunteer activities. Track multiple volunteer organizations for employees and multiple start dates with the same organization.

Entering Information on Employee Volunteer Activities

Access the Volunteer Activities page.

Volunteer Activities page

Volunteer Organization	Select a volunteer organization code.
Start Date and End Date	Enter the start and end date of the employee participation.
Volunteer Status	Select either Part Time or Full Time to indicate the volunteer status.
Type of Volunteer	Select the type of volunteer activity in which the employee is participating: <i>Administr, Canvasser, Executive, Fund Raise, or Other.</i>
Is Volunteer on Leave	Select if the volunteer is on leave.

Note. This check box is for informational purposes only. If you select this check box, you don't affect any Monitor Absences business process functionality.

Note. This information is useful when you need to know about employee additional skills and knowledge, and when you measure the effectiveness of company-sponsored volunteer and charitable programs.

Entering and Tracking Additional Employee Data

This section discusses how to:

- Record badge numbers.
- Track an employee's business expenses.
- Track prior work experience.
- Enter employee images.

Pages Used to Enter and Track Additional Employee Data

Page Name	Object Name	Navigation	Usage
Badge	BADGE	Workforce Administration, Job Information, Badge	Record badge numbers you issue to employees.
Business Expenses	BUSINESS_EXPENSES	Workforce Administration, Job Information, Business Expenses	Track an employee's business expenses, such as travel, meals, entertainment, and relocation costs.
Prior Work Experience	PRIOR_WORK_EXPER	Workforce Administration, Personal Information, Biographical, Prior Work Experience	Track prior work experience. Enter the details of employees' previous employers and jobs.
Employee Photo	EMPLOYEE_PHOTO	Workforce Administration, Personal Information, Citizenship, Identification Data, Employee Photo	Enter an employee image into the system by copying and pasting images into image fields.
General Comments	GENL_COMMENTS	Workforce Administration, Personal Information, Biographical, General Comments	Enter a miscellaneous comment about an employee that doesn't belong in any other page in PeopleSoft Human Resources.

Recording Badge Numbers

Access the Badge page.

Badge

Lewis, Douglas Employee **EmplID:** KU0001 **Empl Rcd#:** 0

Badge Type Find | View All First 1 of 1 Last

Badge Type: CLK Clock + -

Badge Information Find | View All First 1 of 1 Last

***Effective Date:** 11/19/2002 ***Status:** Active + -

***Badge Number:** 48657298

Comment:

Badge page

You must have previously entered Badge Type data on the Translate table before using this page.

Badge Type

Select the type of badge number you want to enter:

BA (Building Access)

CCA (Computer Center Access)

GB (General Badge)

PA (Parking Access)

Add more values if you want or enter more than one badge type for a particular employee and employment record number.

Badge Number

Enter the badge number that corresponds to the badge type you selected.

The system checks to make sure the number you enter isn't currently assigned to another employee. It also checks to make sure the number hasn't been assigned for future use by someone else.

For each badge type, only one badge number per employee and employment record number can be active at the same time. Badge numbers can be reused. If a certain badge type and badge number was previously assigned to an employee, but is currently inactive and hasn't been assigned for future use, you can use it for a different employee and employment record number.

Tracking an Employee's Business Expenses

Before you can track an employee's business expenses, you must set up:

- Valid expense codes on the Translate table.
- User IDs on the Primary Permission List Preferences table.
- Currency codes on the Currency Code table
- Departments on the Department table.

Access the Business Expenses page.

Business Expenses

Lewis,Douglas Employee **EmplID:** KU0001 **Empl Rcd#:** 0

Employee Business Expense Time Find | View All First 1 of 1 Last

***Expense Period End Date:** 11/19/2002

Expense Period Total: 19.00 USD

Business Expense Details Customize | Find | View All First 1-2 of 2 Last

Charge Date	*Expense Code	Expense Amount	*Currency Code	Business Purpose		
11/19/2002	Parking	12.00	USD	Off-site meeting	+	-
11/19/2002	Mileage	7.00	USD	Off-site meeting	+	-

Business Expenses page

Expense Period End Date Enter the expense period end date for the period to which these expenses apply.

Charge Date Enter the date of the actual expense charge.

Expense Code Select an expense code, such as *Airfare* for the charge.

Expense Tab

See the previous exhibit for an example of this tab.

Expense Amount Enter the amount of the expense.

Currency Code Defaults to the currency specified for your user ID on the Primary Permissions List Preferences table. If there is no To Currency for your user ID, then the system defaults in the base currency you specified for your implementation on the Installation table. Override the default currency if necessary using the values in the Currency Code table.

DeptID Tab

Access the DeptID tab.

Business Expense Details Customize | Find | View All First 1-2 of 2 Last

Charge Date	*Expense Code	Business Unit	Department	Description		
11/19/2002	Parking	GBIBU	14000	Administration	+	-
11/19/2002	Mileage	GBIBU	14000	Administration	+	-

Business Expenses: DeptID tab

Business Unit Enter the business unit to which the expense should be charged.

Department Select the specific department to which the expense should be charged.

Warning! The information you enter here isn't related to PeopleSoft Payroll for North America processing of business expenses.

Tracking Prior Work Experience

Access the Prior Work Experience page.

Prior Work Experience

Moore, Catherine J Employee EmpID: KC0005

Years of Work Experience:

Prior Work Experience Find | View All First 1 of 1 Last

Sequence Number: 1

***Start/End Date:** 06/10/1984 03/01/1986 ☐ **Relevant Work Experience**

Employer: Jamison & Adamson

Country: USA United States

City: San Francisco

State: CA California

Phone:

Ending Job Title: Senior Administrative Assistant

Ending Pay Rate: 9.5 ***Currency Code:** USD ***Pay Frequency:** Hour

Prior Work Experience page

If you've tracked an applicant through the Recruiting Employees business process in PeopleSoft Human Resources, the information you entered for an applicant becomes part of their employee record when you hire them. For other employees, entering prior work experience information helps you establish a complete employee profile for reporting purposes. It's also useful for career and succession planning.

Years of Work Experience	The system calculates this value if you select the Relevant Work Experience check box. If so, you must enter a start date and end date.
Sequence Number	Enter a sequence number for each prior work experience record.
Start/End Date	Enter the beginning and end of the employee's tenure with the employer.
Relevant Work Experience	Select if the experience was relevant to the employee's responsibilities with your organization.
Employer	Enter the name of the employee's previous employer.
Ending Job Title	Enter the title in which the employee ended employment.
Ending Pay Rate	Enter the pay rate at which the employee ended employment.
Frequency	The pay Frequency field defaults to <i>Month</i> , which you can change if the pay amount reflects a different frequency.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Plan Careers and Successions, “Planning Careers”

PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce, “Setting Up Recruit Workforce”

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports”

Entering Employee Images

Access the Employee Photo page.

Before you insert an image (such as an employee photograph) in PeopleSoft Human Resources, use a Windows-based graphics or drawing program to capture (and edit if necessary) the image or scanned photograph you want to insert. Then use the Windows-based program to highlight the image or portion of it you want to copy, and copy it to the Microsoft Windows clipboard. In most drawing programs, you can do this by selecting Edit, Copy, or pressing CTRL+C.

Click or tab to the image field and select Edit, Paste, or press CTRL+V to paste the image in the field. Use the Add button to browse for and upload a picture (such as Bitmap or .bmp files).

Note. Full imaging capabilities may not be supported on all database platforms.

See Also

PeopleTools 8.42 PeopleBook: PeopleSoft Application Designer

CHAPTER 9

(BEL) Entering Additional Data for Belgian Workers

This chapter discusses how to:

- Track Claeys formula calculations.
- Prepare for severance calculations.
- Perform the Claeys calculation.
- Generate DIMONA notifications.
- Run the Social Report.

Tracking Claeys Formula Calculations

If you're administering a Belgian workforce, you need to set up codes for events or conditions that may play a role in the termination of a Belgian worker's employment contract and for the special reasons associated with those conditions. You also specify employment contract statutes and substatutes, and track special jobs that allow for lower premiums than are normally required by Belgian labor regulations.

Many of the tables that you set up for these purposes contain information that you use when performing Claeys Formula calculations. The Claeys Formula is used by employers to calculate the cost of terminating a worker's contract, based on number of service years, salary, age, seniority, type of employment contract, and so on.

This section discusses how to:

- Enter codes for events and conditions resulting in terminating employment contracts.
- Define reason codes for ending employment contracts.
- Set up Belgian employment contract statutes for Claeys calculations.
- Link contract statutes to RSZ categories.
- Record information necessary for termination a Belgian worker.
- Enter a replacement for the employment contract.

Pages Used to Track Claeys Formula Calculations for Belgian Workers

Page Name	Object Name	Navigation	Usage
End Contract Type - BEL	CNT_END_TBL_BEL	- Set Up HRMS, Product Related, Workforce Administration, Workforce Data BEL, Contract End Types - Workforce Administration, Job Information, Contract Administration, Define Contract End BEL	Enter or update codes for events and conditions that could result in the termination of employment contracts.
End Contract Reason - BEL	CNT_ENDRSN_TBL_BEL	- Set Up HRMS, Product Related, Workforce Administration, Workforce Data BEL, Contract End Reasons - Workforce Administration, Job Information, Contract Administration, Define Contract End Reason BEL	Define the reasons associated with event codes by adding or updating employment termination reason codes. First define contract termination event types.
Statute Table	STATUTE_TBL_BEL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data BEL, Statutes	Set up and maintain Belgian employment contract statutes and substatutes, and associate contract types with statutes.
Reduced Charged Table	RED_CHRG_TBL_BEL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data BEL, Reduced Charges	Set up page to update or add reduced charges job categories in to the system. Under Belgian employment law, these are job categories that allow you to pay reduced taxes and/or premiums on the compensation to workers who hold those jobs.
RSZ Category Table	CNT_RSZS_TBL_BEL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data BEL, RSZ Categories	Link contract statutes to RSZ (Rijksdienst Sociale Zekerheid) categories.
Contract Ending	CONTRACT_END_BEL	Workforce Administration, Job Information, Contract Administration, Terminate Contract BEL	Record information necessary for terminating a Belgian worker.
Contract Replacement	CONTRACT_REPL_BEL	Workforce Administration, Job Information, Contract Administration, Replace Contract BEL	Enter the person who replaces the worker in the employment contract.

Entering Codes for Events and Conditions Resulting in Terminating Employment Contracts

Access the End Contract Type - BEL page.

End Contract Type - BEL

End Contract Type: 003

End Contract Type View All First 1 of 1 Last

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

*Description: Early retirement

☒ Mandatory Replacement Number of months: 24

End Contract Type - BEL page

The end contract type codes can cover a wide range of events, including the employee's death, a voluntary or involuntary separation from your organization caused by retirement or relocation, or promotion into another job that has a different employment contract associated with it.

Mandatory Replacement

Select if the reason for ending an employment contract with one employee requires mandatory replacement of the former worker with another worker in the same employment contract.

Number of months

If you selected Mandatory Replacement, enter (in months) the period of time required to position the replacement.

Note. Belgian employment law mandates these requirements.

Defining Reason Codes for Ending Employment Contracts

Access the End Contract Reason - BEL page.

End Contract Reason - BEL page

End Type

Select an end type from the list of end contract type codes entered on the End Contract Type page.

Note. If you've already moved out of the End Type field, and then decide to change the End Type code, you'll need to clear and reenter the Mandatory Replacement and Number of months fields.

Mandatory Replacement and Number of months

If you selected an end type that requires mandatory replacement, when you move out of the End Type field, the system automatically selects this check box for the End Contract Reason code. The system then enters the number of months that you have to replace the current employee with another employee in this contract.

If you didn't select an End Type associated with mandatory replacement information, indicate if the reason for ending an employment contract with one employee requires mandatory replacement of the former worker with another worker in the same employment contract. Then enter the number of months that can pass before you have to find the replacement employee.

Note. Belgian employment law mandates these requirements.

Setting Up Belgian Employment Contract Statutes for Claeys Calculations

Access the Statute Table page.

Statute Table

Statute: 02

Statute Find | View All First 1 of 1 Last

***Effective Date:** 01/01/1900  ***Status:** Active   

Description: Employee

***Contract Type:** Employment  **Regulatory Region:** BEL

Substatute Customize | Find | View All  First 1-4 of 4 Last

Not Applicable 		
Regular Employee 		
Sales Representative 		
Executive 		

Statute Table page

Contract Type

Select a contract type for the statute. Values are: *Employment*, *Member of the professions*, *Non applicable* and *Self Employed*.

Substatute

Select the statute code with which the system should associated this substatute code.

Linking Contract Statutes to RSZ Categories

Access the RSZ Category Table page.

RSZ Category Table

Contract Type: Employment

Statute: Employee

Substatute: Regular Employee

Results in Find | View All First 1 of 1 Last

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

***RSZ-Category:** 090  Entitled Office Worker ☒ **RSZ-Submitted**

RSZ Category Table page

Use the government-defined RSZ categories to maintain social security records for your Belgian employees. Associate each combination of contract type, statute, and substatute with an RSZ category for Claeys Formula calculations.

RSZ-Submitted

Select to indicate that the contract is subject to RSZ. Before selecting this check box, determine whether RSZ premiums have to be paid to the Belgian social security system for the pay (wage or reimbursement) associated with this contract.

RSZ-Category Select an RSZ-category from the list.

Linking the Employee to a Third-Party Service Provider

The system displays the Contract Type, the contract Statute, and the Contract Seq Number (contract sequence number) for this employee.

Recording Information Necessary for Terminating a Belgian Worker

Access the Contract Ending page.

Contract Ending

Leclercq,Francois Employee **EmplID:** KB0005

Contract Data Find | View All First 1 of 1 Last

Contract Number: 0001 **Begin Date:** 06/02/1999 **End Date:**

Contract Type Find | View All First 1 of 1 Last

Employment 01 Employee

End Contract Find | View All First 1 of 1 Last

***End Contract Type:** 008 Contract ending

End Contract Reason: 05 End of temporary contract

Notification Period Months: **Notification Period Weeks:** 4

***Start Date:** 11/25/2002 ***End Date:** 12/22/2002

Start Date Worked: 01/07/2002 **End Date Worked:** 12/22/2002

Start Date Payment: **End Date Payment:**

☐ **Mandatory Replacement** **End Date Mandatory Replacement:** 12/22/2002

Contract Ending page

Use this page to:

- Specify that the worker's employment contract has ended and the reason your organization has chosen to end the contract.
- Set up and track the worker's termination notification period.
- Track the worker's replacement if a replacement is mandatory based on the contract type.

End Contract Type Select a valid end contract type (such as death, disability, or early retirement with mandatory replacement).

End Contract Reason Select an end contract reason (such as disrupted employee relations, family reasons, a company specific program, or contract expiration).

Notification Period Months Enter the number of months of notice that the employee must be given prior to the contract end date. The notification period that you enter here impacts Claeys calculations in the Create Notification component. If

you enter an amount here and move out of the field, the Notification Period Weeks option becomes unavailable for entry.

Notification Period Weeks	Enter the number of weeks of notice that the employee must be given prior to the contract end date. The notification period that you enter here impacts Claeys calculations in the Create Notification component. If you enter an amount here and move out of the field, the system makes the Notification Period Months option unavailable for entry.
Start Date and End Date	Enter the date the notification period begins and the date on which the notification period ends and the employment contract terminates.
Start Date Worked	Record the employee's start date for this job contract, which should be the same as the date that you record for a job change in the worker's job record.
End Date Worked	Enter the employee's last working day on this job contract, which should be the same as the date that you record for a job change in the worker's job record—whether the worker is terminating with your company or leaving one job contract to move into another.
Start Date Payment and End Date Payment	Track the start and end payment dates, which the system stores and uses for payroll.
Mandatory Replacement	If the end contract type that you selected requires mandatory replacement, the system automatically selects this check box and makes it unavailable for entry. Specify whether an end contract type requires replacement on the End Contract Type - BEL page.
End Date Mandatory Replacement	If the end contract type requires mandatory replacement, the system calculates the end date of the mandatory replacement period based on the end date on which the employee is terminated. It also calculates the number of months that you specified on the End Employment Terms table (CNT_END_TBL_BEL) as the length of the replacement period.

See Also

Chapter 9, “(BEL) Entering Additional Data for Belgian Workers,” Defining Reason Codes for Ending Employment Contracts, page 245

Entering a Replacement Worker for the Employment Contract

Access the Contract Replacement page.

Contract Replacement		
Leclercq,Francois		Employee
		EmplID: KB0005
Contract Data Find View All First 1 of 1 Last		
Contract Number:	0001	Begin Date: 06/02/1999 End Date:
Contract Type Find View All First 1 of 1 Last		
Employment Employee		
End Contract Find View All First 1 of 1 Last		
☐ Mandatory Replacement		
End Date:		
Structural Absence Find View All First 1 of 1 Last		
☐ Mandatory Replacement		
Empl Rcd Nbr: 0		
Absence Type:		
Begin Date: End Date:		
Contract Replacement Find View All First 1 of 1 Last		
*Effective Date:	11/19/2002	
*Replacing ID:	KB0003	Overbeeke,Sabine
Replacing Contract Nbr:	0001	☐ Mandatory Replacement
End Replacement:		
*Replacement Percentage:	100.00	
End Date Mandatory Replacement:		

Contract Replacement page

Replacing ID

Select the ID of the employee who replaces the terminated employee in this contract. The system displays all employees who have been tagged as replacement employees for Belgian employment contracts in your human resources system. Select any applicant or employee with employment terms. If you want to hire someone as a replacing employee, you must create employment terms for him or her first before selecting them as a replacing ID here.

Replacing Contract Nbr
(replacing contract number)

Select the number for this contract, based on the replacing employee ID that you selected.

Mandatory Replacement

Select to indicate that mandatory replacement is required.

End Replacement

If you selected Mandatory Replacement, enter the date for the end replacement. You may want to track this date if you have an earlier than expected end date for a fixed term employment contract, if you know the end date.

End Date Mandatory Replacement

Enter the end date for mandatory replacement.

Preparing For Severance Calculations

Employers in Belgium or organizations employing a Belgian workforce are required to track worker information that is used in the Claey's formula calculation. This calculation determines the amount of severance compensation that your organization must pay a worker if you terminate employment. The formula looks at factors like the employee's seniority, age, and annual compensation (including salary, vacation pay, and so on) to determine your organization's liability to the employee.

This section provides an overview of how Claey's calculates severance and of how to prepare for the Claey's calculation and discusses how to:

- Track additional seniority.
- Enter protected job leave information.

Understanding How Claey's Calculates Severance

The Claey's formula calculates months of severance salary owed to an employee as follows:

$0.89 \times (\text{seniority}) + 0.08 \times (\text{employee's age}) + 0.0013 \times [\text{yearly compensation in EUR divided by } 1000 \times (\text{Reference Index divided by Actual Index})] - 2 = \text{Notification Period, or months of severance salary owed the employee}$

For example, an employee with 13 years of seniority with a company, who is 38 years of age, and who is making 82,500 EUR is entitled to 13 months of severance pay. The calculation works as follows:

$0.89 \times 13 = 11.57$ (seniority factor)

$0.08 \times 38 = 3.04$ (age factor)

$0.0013 \times (82,500 / 1000) \times (125.30 / 126.00) = .1066$ (compensation factor)

11.57 (seniority factor) + 3.04 (age factor) + $.1066$ (compensation factor) - 2 = 13 months of severance

Note. The value for compensation is the employee's yearly compensation. This amount is based on the employee's monthly wage multiplied by the factor designated in the company table for your organization. The Belgian regulated factor amount is around 13.9.

Preparing To Use the Claey's Calculation

Preparing for the Claey's employment compensation calculation in PeopleSoft Human Resources involves:

- Establishing default company level information used for Claey's formula employee compensation calculations on the Company table (COMPANY_TBL), including factoring information defaults for calculating worker seniority, age, compensation, and so on.

You can override this data at the employee level in the Create Notification component, where you perform the Claey's calculation for a specific worker.

- Entering and maintaining information about the employee's:
 - seniority with your organization (stored on EMPLOYMENT_DATA)
 - age (stored on PERSONAL_DATA)
 - compensation (stored on JOB)

- Entering and maintaining employment contract information for the employee on the Contract Data pages (stored on CONTRACT_DATA).
- Entering and maintaining end employment terms information regarding required notification periods for workers whom your company may terminate (stored on CNT_END_TBL_BEL).
- Maintaining additional information used to record Belgian seniority including protected job leave information (stored on SENIORITY_BEL).

See Also

Chapter 9, “(BEL) Entering Additional Data for Belgian Workers,” Performing the Claeys Calculation, page 254

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Setting Up Organization Foundation Tables,” (BEL) Entering Default Information and Salary Factors

Pages Used to Prepare for Severance Calculations

Page Name	Object Name	Navigation	Usage
BEL Seniority	SENIORITY_BEL	Workforce Administration, Collective Processes, Administration BEL, Identify Seniority	Track additional seniority for an employee that impacts the Claeys calculation that you perform in the Create Notification component.
Protection	PROTECT_BEL	Workforce Administration, Collective Processes, Administration BEL, Create Protection	Enter protected job leave information for a Belgian employee. You can assign protection to employees who are union delegates, who take part in elections, or who have other qualifying characteristics.

Tracking Additional Seniority

Access the BEL Seniority page.

BEL Seniority

Leclercq,Francois Employee EmplID: KB0005 Empl Rcd#: 0

Hire Date: 06/02/1999 **Termination Date:**

Seniority Type View All First 1 of 1 Last

*Seniority Type: Legal Seniority + -

Seniority Find View All First 1 of 1 Last

*Eff Date:	11/19/2002	End Date:	01/18/2003	Nbr Months:	2	☒ Included
Remark:						

BEL Seniority page

The system uses the seniority information for the employee recorded on this page when performing Claeys formula processing to determine the employee's months of service. If no service months information is available on the Seniority page for an employee, the system references the employee's service months calculation on the Job Data - Job Information page.

For example, seniority in another organization may or may not count towards an employee's company seniority, depending on your own organization's business rules, but it would count towards legal seniority that impacts the Claeys calculation. This distinction is particularly important in the case of mergers between organizations where you'll decide if the seniority of employees from one organization is recognized by the other organization and count towards seniority and, if so, to what extent. Using this page, you can specify the number of months of seniority that workers can carry over to your organization from their former companies.

Seniority Type

Select the seniority type method that you want to use to determine this employee's seniority in your organization:

Company Seniority: When figuring seniority, this method doesn't account for periods of leave time that employees may use while remaining in a job, pension calculation issues, recognized service time, and so on.

The system *doesn't* take into account company seniority months when performing the Claeys calculation for an employee. If you enter a period for company seniority, the Claeys calculation uses only the months of seniority based on the employee's service time on their Job Data record.

Legal Seniority: The system accounts for this seniority amount when calculating the Claeys Formula, which is used to calculate base pay for Belgian employees.

If you enter a period for legal seniority, the Claeys calculation takes the number of service months displayed in the Nbr Months field and adds it to the months of service from the employee's Job Data record and displays the sum of the two amounts on the Create Notification - Base page.

Eff Date (effective date)

Enter the effective date to record the beginning of the employee's additional seniority period. The system defaults in the system date, usually today's date, which you can modify to reflect the additional seniority period.

End Date

Enter the end date for the seniority period.

Nbr Months (number of months)

When you move out of the End Date field, the system calculates the number of months of seniority. The system doesn't calculate partial months. If an employee's seniority period is 100 months and 16 days, the system calculates *100* months of seniority.

Included

Select to ensure that the system adds the months of seniority you entered here to the employee's seniority based on their Job record (JOB) when it performs the Claeys calculation. If you clear this check box and enter *Legal Seniority* months, the system *subtracts* the seniority period from the employee's seniority when it calculates the Claeys formula.

Remark

Enter relevant remarks about the additional seniority that you are tracking.

Entering Protected Job Leave Information

Access the Protection page.

Protection

Leclercq,Francois Employee EmplID: KB0005 Empl Rcd#: 0

*Protection Type	*Effective Date	*End Date	Nbr Months
Paternity leave	11/19/2002	12/20/2002	1

Protection page

Protection Type

Select a protection type to indicate why this leave of absence is protected.

Note. Belgian employment law mandates these protection types.

End Date

Enter the date on which the employee will return to work.

Nbr Months (Number of Months)

When you move out of the End Date field, the system calculates the duration of the protected absence.

Note. The system calculates only the absence period to the nearest month and doesn't allow for partial months. If the protected leave duration period is 45 days, the system indicates that the employee's absence covers *one* month only.

Note. The system *doesn't* take into account protection months when it calculates Claeys formula seniority, in part because protection isn't limited to absences from work that might impact seniority months.

Performing the Claeys Calculation

Once you've hired a Belgian employee into your human resources system and established employment contract terms, end employment terms, seniority, and protected leave (protection) information, you can perform the Claeys calculation to determine your potential severance pay liability if you were to terminate the employee.

This section discusses how to:

- Review Claeys calculation variables.
- Calculate the severance amount.
- Run the Notification report.

Pages Used to Perform the Claey's Calculation

Page Name	Object Name	Navigation	Usage
Base	NOTIF_CALC_BEL	Workforce Administration, Collective Processes, Administration BEL, Create Notification, Base	Review and set Claey's calculation variables, including the employee's compensation, default factor information, and months of service.
Results	NOTIF_CALC2_BEL	Workforce Administration, Collective Processes, Administration BEL, Create Notification, Results	Calculate the severance amount.
Report	RUNCTL_PER066_BEL	Workforce Administration, Collective Processes, Administration BEL, Create Notification, Report	Run the Notifications report (PER066BE).

Reviewing Claey's Calculation Variables

Access the Create Notification - Base page.

Base Results Report			
Leclercq,Francois		Employee	EmplID: KB0005 Empl Rcd#: 0
Contract Number:	0001	Employment	Hire Date: 06/02/1999
Contract Begin Date:	06/02/1999	Employee	
Probation Date:		Effective end probation:	☐ Mandatory Replacement
Comp Rate:	124083.333333	M/Yr Factor	Annual Rt
Commissions:		Monthly	13.8500000 1718554.167
Value extra			0.000
benefits:			0.000
		☐ Above sal.limit	Total: 1718554.167
Months service time:	42		
Start date notification period:	12/01/2002	Act.index:	Date: 12/31/2001
		Ref.index:	Date: 07/01/1997

Create Notification - Base page

The system displays the employee's name, their employee ID and the employment Empl Rcd# (employment record number) for your reference. This information comes from the employee's personal data record.

The system displays employment and end employment contract terms information for the employee that you entered on the Contract Data and BEL Contract Ending pages. The system displays the employee's Hire Date from the Job Data record and indicates if, according to the end employment terms for the worker, the contract requires Mandatory Replacement.

Determining the Employee's Base Compensation Amount (Jaarloon)

Comp Rate (compensation rate)	The system calculates the employee's monthly compensation rate based on the employee's compensation rate information on the Job Data - Compensation page and displays it here. Adjust the rate information as necessary. The system uses this amount when determining the employee's monthly pay variable for the Claeys calculation.
M/Yr Factor (month/year factor)	The system multiplies the month base amount by the M/Yr Factor of <i>13.85000</i> to calculate the employee's Annual Rt income amount. The default factor displayed here comes from the default employee compensation factors that you entered on the Company table. The Belgian government determines this factor amount, but you can override the default here if the factor amount changes.
Commissions	Enter any commissions amount that the system should add to the employee's month base as part of the Claeys calculation income amount.
Value Extra Benefits	Add in value extra benefits amounts, including other components of nonbase pay, such as any benefits the employee receives (for example, salary, vacation pay, 13th month, meal checks, and so on). The system multiplies the Val. Extra amount by the Val. Extra M/Yr Factor of <i>13.85000</i> to calculate the employee's yearly extra income amount.
Total	The system displays the total compensation amount (jaarloon) based on the year base, the commission, and extra benefit results. Adjust the system calculated total as necessary.

Understanding the Above Salary Limit Setting

Above sal. limit (above salary limit)	The system also indicates if the employee's compensation total is above salary limit by accounting for the contract type. Select this check box to override the factor values on the Create Notification - Results page. To change the salary limit setting, ensure that the start date notification period date falls <i>after</i> the effective end probation date that appears with the employee's contract information at the top of the page. In this case, the system fixes the salary limit for a longer period (in which case the system uses the factors in the Claeys Defaults group box on the Create Notification - Results page in the Notification period calculation and makes them available for entry). If the date is <i>prior</i> to the effective end probation date, you can't change the salary limit setting.

Note. The compensation currency on the Create Notification - Base and Create Notification -Results pages is the same as the employee's job currency that is set on the employee's Job record (JOB).

Determining the Employee's Seniority

Months service time	The system calculates and displays the employee's number of months service time. The system determines service month information by looking at both the employee's service months information on the Job Information page (JOB_DATA) and the number of months service time

on the Seniority page (SENIORITY_BEL) if the seniority type is set to *Legal Seniority*. The system adds the two seniority amounts and displays them as the months service time amount.

The system doesn't consider partial months in this calculation and doesn't round up. If the employee's service time is 9 months, 16 days, the system displays 9 as the employee's months service time. Adjust the months service time as necessary.

Note. If you enter seniority information in the Seniority page for an employee, and the seniority type is set to *Company Seniority*, the system uses the months of seniority calculation on the Job Information page to set the number of months service time on the Create Notification - Base page.

Start date notification period

Set the start date notification period for the employee's termination notification period date to the first day of the *next* month if you're not performing the Claeys calculation for this employee on the first day of the *current* month. The default value is the first day of the month following the effective date that appears with the contract information at the top of the page.

For example, if you start your Claeys calculation for an employee on April 14, the system enters a start date for the notification period of May 1. Override this date as necessary.

Note. The Start date notification period that appears on the Base page affects the way the system performs the Claeys Calculation on the Results page. If the Start date notification period begins before the effective end probation date on the Base page, the system uses a notification period of *Days* on the Results page when you click the Calculation button. If you enter a Start date notification period that begins after the employee's effective end probation date, the system uses a notification period of *Days*, *Weeks*, or *Months*, depending on the statute information entered for that employee on the Contract Data - Contract Type/Clauses page, as follows. If the employee is classified as a *Worker* on the Employment Terms Type page, the notification period appears in *Weeks*. The classification of *Employee* results in a Notification period of *Months*. And the classification of *Not Applicable* results in a Notification period of *Days*.

Act. Index (actual index)

The actual index if one is assigned for this company in the Company Table. The actual index is a monthly reference number to be held against the reference index number.

The actual index is used in the Claeys calculation to calculate the notification period term related to the Yearly Base on the Create Notification - Results page:

$(\text{Yearly Base Salary} / 1000) * (\text{Factor Yearly Base} / \text{Act Index})$
 * Correction Factor).

Date

The last day of the year preceding the year when you're performing the Claeys calculation for an employee (in this case, December 31, 1997). This date is for your reference only, and isn't saved when you save the page.

Ref. Index (reference index) You can also update the reference index or accept the system default that is based on the Factor Yearly Base Index set up on the Company Table- Default Settings, Claey's Defaults for this company. The reference index is a yearly reference amount to be compared against the actual index amount.

Date The system also displays the reference index date (in this case, July 1, 1997). The system sets this date to the beginning of the last half of the year prior to the year in which you're performing the Claey's calculation. This date is for your reference only, and isn't saved when you save the page. The system doesn't use the reference index as part of the Claey's calculation.

Calculating the Severance Amount

Access the Create Notification - Results page.

Base		Results		Report	
Leclercq,Francois		Employee		EmplID: KB0005 Empl Rcd#: 0	
Contract Number: 0001		Contract Begin Date: 06/02/1999			
Claey's Defaults			Notification Period		
Factor Seniority:	0.8900000	+ + + - Calculation			
Factor Age:	0.0800000				
Correction Factor:	0.0013000				
Term Correction:	2.0				
Factor Yearly Base:	125.3000000				
Calculation					
Notification period:	3 Months	End compensation:	429638.542		
Protection period:	0	Revenue compensation:	0.000		
Protection End Date:		Total:	429638.54		

Create Notification - Results page

The system displays the Claey's Defaults for Factor Seniority, Factor Age, Correction Factor, Term Correction, and Factor Yearly Base from the Company table for this employee's company that you assigned on the Job Data - Work Location page. Change these factors at the employee level on this page *only* if you selected the Above sal. limit check box on the Create Notification - Base page.

Note. The system uses these Claey's defaults factors as part of the Claey's calculation only when the Above sal. limit check box is selected on the Create Notification - Base page.

When you first open this page, the Notification Period and Calculation group boxes are empty. This is where the system displays the results of the Claey's calculation for this employee after you perform the calculation by clicking the Calculation link.

The system displays the calculated Notification period for this employee in the Calculation group box and shows how it calculated the Notification period in the Notification period group box.

How the System Calculates the Notification Period

The system calculates the notification period in one of two ways depending on whether the employee's yearly base salary is above the salary limit:

- If the employee's yearly base salary is *above the salary limit* (Sal limit check box selected), the Notification period that appears in the Calculation group box is based on the calculations that appears in the Notification Period group box.

The system calculates the Notification Period based on the employee's seniority, age, and compensation:

Seniority Term = (Months Service Time / 12) * Factor Seniority

Note. For the Seniority Term amount, the system rounds the division by 12 differently for each month.

Age Term = Employee's Age on Notification Start Date * Factor Age

Compensation Term = (Base Total / 1000) * (Factor Yearly Base / Actual Index) * Correction Factor

Total Notification Period = Seniority Term + Age Term + Compensation Term - Term Correction

You can tell if you're using the above salary limit method by the way the page looks when you perform the calculation. If the system used the above salary limit method to determine the notification period, it displays the Notification Period calculation in the Notification Period group box. The Claeys defaults that appear on the page are also available for entry, though these come from the company defaults for the employee's company and probably shouldn't be changed.

- If the employee's base isn't *above the salary limit*, (Above sal. limit check box is cleared), the Notification period amount is based on the statute, service time, probation end date, and notification start date—without accounting for any of the Claeys Defaults factors that appear on the page. In this case, the system calculates the employee's notification period as follows:

If the Statute is "Worker"

if Notification Start Date <= Effective Probation End Date, then Period is "0"

if the Service Time is lower than 240 Months (20 years) the Period is "4"

else the Period is "8"

If the Statute is "Employee"

if Notification Start Date <= Effective Probation End Date, then Period is "7"

else the Period is (((Service Time / 12) / 5) + 1) * 3 (each division is truncated⇒ with zero decimals)

Else the Period is "0"

The unit of time for the notification period information is based on the employee's statute type that you established on the Contract Data - Contract Type/Clauses page (CONTRACT2) as defined on the Statute Table page (STATUTE_TBL_BEL). When the statute type is set to *Worker*, the period unit is in *Weeks*. When the statute is for an *Employee*, then the period unit is in *Months*. If the statute is anything other than worker or employee, the period unit is *Days*. Whenever the notification start date falls within the probation period, the unit of time is *always* Days.

Understanding Protection Period Information

The system compares the end date for any of this employee's qualifying protection periods that you recorded on the Protection table (PROTECTION_BEL) to the notification start date recorded on the Belgian Notification Calculation table (NOTIF_CALC_BEL) to determine the Protection period. This method of comparison ensures that the employer respects the employee's protection rights.

Note. The protection period isn't included in the Claeys calculation process.

The system also displays the Protection End Date, which is the *actual* end date of the protection period if there is any protected leave time entered for this employee on the Protection page. This is the date that you set as the end date for any qualifying protection period that you specified on the Protection page.

Working With the End Compensation Amount

End compensation is the resulting Claeys calculation amount that you owe this employee as severance pay as calculated by the system.

Depending on the notification period unit of time, the system calculates the end compensation by dividing the yearly base total (displayed on the Create Notification, Base page) by 12 if the notification period is months, 52 if weeks, or 365 if days. The result is then multiplied by the notification period amount to arrive at the end compensation amount. For example, the end compensation amount calculation for Josef Timmermans is:

$$(2391248.62 / 12) * 4 = 797082.87$$

Any amount that you enter in the Revenue compensation field is added to the Total severance amount for the employee.

If you need to change the notification data and rerun the calculation, make your changes and click the Calculation link again. The system clears the old results and calculates the Claeys amount based on your changes.

Warning! The system does not save this data. You must run the Notification report to maintain records for each calculation.

Running the Notifications Report

Access the Create Notification - Report page.

After completing the Claeys calculation, run the termination notification report. The report page displays the employee's ID and Record Number together with the Claeys formula calculated notification period.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Setting Up Organization Foundation Tables," (BEL) Entering Default Information and Salary Factors

Generating DIMONA Notifications

This section provides an overview of DIMONA (Déclaration Immédiate – Onmiddellijke Aangifte) notifications and discusses how to:

- Create DIMONA notifications.
- Review DIMONA notifications.

Understanding DIMONA Notifications

The Belgian E-government Social Security plan requires companies to report social insurance data for workers employed under Belgium regulations. DIMONA (Déclaration Immédiate – Onmiddellijke Aangifte) notifications contain the required data.

The Create DIMONA Notification process (HRBEL_DIM_AE) generates DIMONA notifications as flat files. PeopleSoft supports employee hire and employee termination DIMONA notifications, including corresponding updates and cancellations. You can generate notifications for a single employee, for a company, or for a business unit.

After you have generated flat files containing the notifications, you can transfer the flat files to the National Office for Social Security (NOSS), known as RSZ or ONSS in Belgium, using the NOSS ftp server. Once you transfer data to the NOSS, you can consult and update employee data using the NOSS database system.

Pages Used to Generate DIMONA Notifications

Page Name	Object Name	Navigation	Usage
DIMONA Notification	HR_DIMONA_CNTL_BEL	Workforce Administration, Collective Processes, Administration BEL, Create DIMONA Notification	Create DIMONA notifications.
Review Notification	HR_DIMONA_RVW_BEL	Workforce Administration, Collective Processes, Administration BEL, Review DIMONA Notification	Review DIMONA notifications.

Creating DIMONA Notifications

Access the DIMONA Notification page.

DIMONA Notification	
Run Control ID: GB12	Report Manager Process Monitor Run
Language: English	
Report Request Parameter(s)	
From Date: 01/01/2002	End Date: 06/30/2002
Company: GBI	Version: 022
Business Unit: BEL01	☐ Re-start Start Date:
	☐ Create DIMONA Start File
Demand Information	
Sender Nr: 123456	Name: SAFLA LTD.
Address: GROTE MARKT 1	Postal: 0001000
Council: BRUSSEL	Country Code: 00150
Comment: GEEN MEDELING	
Contact	
Name: MAMADOU DIARA	Tel: 022768989
Function: CEO	

DIMONA Notification page

Report Request Parameter(s)

From Date and End Date Enter begin and end dates for the period to include in the DIMONA notification.

Version Enter the DIMONA version number (from the first page of the Glossarium) used when creating the DIMONA file.

Company and Business Unit Enter the company or business unit for which to create a DIMONA notification.

Create DIMONA Start File Select to indicate that this is the initial DIMONA creation. When selected, the DIMONA file will contain all employees and workers.

Restart Information

Re-start Select to indicate that an existing notification needs to be recreated. The system processes only those notifications that have been reviewed and set to *Re-do* on the Review Notification page.

Start Date Select the process date of the original notification that needs to be recreated.

Demand Information

Enter information about the person sending the notification.

Sender Nr (sender number) Enter the number the NOSS assigned to the person sending the notification.

Council Enter the sender's city.

Country Code Enter the sender's National Institute for Statistics (Nationaal Instituut voor de Statistiek) (NIS) country code.

Contact

Name, Function, and Tel. (telephone number) Enter the name, function, and telephone number of the person the NOSS can contact in case there is a problem with the file.

HRBEL_DIM_AE Process

The HRBEL_DIM_AE process selects all employees that have been hired or terminated, based on personal and job data, and creates a notification for them. The process creates notification flat files according to the NOSS standard and names the file according to NOSS naming conventions.

Reviewing DIMONA Notifications

Access the Review Notification page.

Review Notification page

Process Date (Optional) Enter the date the notification was processed.

EmplID (Optional) Enter the employee ID of the notification to review.

Hire Date (Optional) Enter the hire date of the notification to review.

NOSS Portal Click to access the NOSS Website. From this page you can log on to the NOSS webserver to check the latest information about the DIMONA notification or other information about Belgian social security.

Status (Optional) Select the status of the notification to review: *Cancel*, *Delete*, *Done*, or *Re-do*.

Action (Optional) Select the action reported by the notification: *Cancel*, *Hire*, *Terminate*, or *Update*.

Select with Matching Criteria Click to populate the Payees group box with information on the notifications that match your criteria.

DIMONA Nr (DIMONA number) Enter the notification number assigned by NOSS.

Update and Termination Notifications

Using this page and the DIMONA Notification page, you can create update and termination notifications.

To create single employee update and termination notifications:

1. Access the Review Notification page.
2. Enter the process date and the employee ID.
3. Click Select with Matching Criteria.
4. Set the notification action to *Update* or *Terminate*.
5. Set the notification status to *Re-do*.
6. Save the page.
7. Access the DIMONA Notification page.
8. Select the Re-start check box and enter the process date in Start Date.
9. Run the HRBEL_DIM_AE process.

To create update and termination notifications for more than one employee, follow the same steps as for a single employee notification except:

- In step 2, enter the process date and any additional criteria.
- Perform steps 4 and 5 for all employees to include in the notification.

Running the Social Report

This section explains how to generate the Belgian Social report.

Page Used to Run the Social Report

Page Name	Object Name	Navigation	Usage
Social Report	RUNCTL_PER067_BEL	Workforce Administration, Workforce Reports, Social Report BEL	Run the Social Report (PER067BEL) that reports a variety of employer/employee information required by the government.

CHAPTER 10

Managing Country-Specific Workforce Data

This chapter discusses how to:

- Provide additional Canadian information.
- Run the CHE Company Statistics report.
- Generate AFI flat files.
- Provide additional information for French employees.
- Record and report SAMEN diversity information for Dutch workers.
- Record end of employment information for Italian workers.
- Run the ITA Equal Opportunities report.
- Determine USA foreign nationals residency status.

(CAN) Providing Additional Canadian Information

There are a few issues unique to your Canadian workforce. Use the following pages to record and report the necessary employee information.

Note. While the Ontario Employment Equity Commission (OEEC) no longer requires employees in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality.

This section discusses how to:

- Enter OEEC workforce survey responses.
- Record employee level information about official language use.

Pages Used to Provide Additional Canadian Information

Page Name	Object Name	Navigation	Usage
OEE Workforce Survey	CAN_OEE_SURVEY	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Workforce Survey Result	Enter Ontario Employment Equity Commission (OEEC) workforce survey responses.
Official Languages	PERS_OFFLNG_CAN	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Official Languages	Record employee level information about the use of official languages. The information stored in this page is used for the Official Languages reports you submit to the Canadian government, in accordance with the Official Languages Act.
OEE Groups by OCC Group	RUNCTL_FTCANAC	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups by OCC Group Report	Generate the OEE Groups by OCC Group report (PER103CN). The report lists the totals of active employees within each defined area code(s) employed within the date range.
OEE Groups by Employment Type	RUNCTL_FTCANAC	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups by Employment Type Rpt	Generate the OEE Groups by Employment Type report (PER104CN).
OEE Groups/Jobs Filled/Vacated	RUNCTL_FTCANAC	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups/Jobs Filled/Vacated	Generate the OEE Groups by Jobs Filled/Vacated report (PER106CN) lists the totals of active employees within the defined area code(s) employed within the date range.
OEE Workforce Survey Stats	RUNCTL_PER105CN	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Workforce Survey Stats	Run the OEE Work Force Survey Stats report (PER105CN). While the Ontario Employment Equity Commission (OEEC) no longer requires employees in Ontario to complete workforce surveys, PeopleSoft continues to offer OEE reporting functionality. The OEE Work Force Survey Stats report lists the number of surveys received and the numbers that were completed.

Entering OEEC Workforce Survey Responses

Access the OEE Workforce Survey page.

OEE Workforce Survey

Griffiths, Martina Rae Employee **EmplID:** KC0001 **Empl Rcd#:** 0

Canadian OEE Workforce Survey Find | View All First 1 of 1 Last

*Date Survey Received: 06/15/2000 ☐ Completed

Survey Data

☐ Aboriginal ☐ Minority ☐ Disabled ☒ Female

OEE Workforce Survey page

Date Survey Received Enter the date the survey was received. The default is the system date, which is usually today's date. Change this date if necessary.

Completed Select to indicate that the survey was completed.

Survey Data Indicate whether the survey respondent is *Aboriginal*, *Minority*, *Disabled*, or *Female*.

Recording Employee Level Information About Official Language Use

Access the Official Languages page.

Official Languages

Griffiths, Martina Rae Employee **EmplID:** KC0001

*Service to Public: Eng. Only

Language of Internal Service

*Montreal: Eng. Only

*Quebec: Eng. Only

*New Brunswick: Eng. Only

*Ontario: Eng. Only

*NCR: Eng. Only

Supervisory Communication Req't

*Montreal: Other

*Quebec: Required

*New Brunswick: Other

*Ontario: Other

*NCR: Other

Official Languages page

Service to Public Indicate which languages the employee uses to provide service to the public.

Language of Internal Service

Montreal, Quebec, New Brunswick, Ontario, and NCR (National Capital Region)

For the locations listed in this group box, indicate which language(s) the employee uses to communicate internally. Use *N/A (not applicable)* for those locations that don't apply.

Supervisory Communication Reqt (supervisory communication required)

Montreal, Quebec, New Brunswick, Ontario, and NCR (National Capital Region)

For the locations listed in this group box, indicate which language(s) the employee requires for supervisory communication. Use *N/A (not applicable)* for those locations that don't apply.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, “(CAN) Meeting Regulatory Requirements for Canada,” Running Canadian Official Languages Reports

(CHE) Running the Company Statistics Report

This section discusses how to generate the Company Statistics report (Betriebszaehlung). The Swiss Federal Department of Statistics requires all Swiss companies to create this report every ten years.

Page Used to Run the Company Statistics Report

Page Name	Object Name	Navigation	Usage
Company Statistics	RUNCTL_PER001_CHE	Workforce Monitoring, CHE-Company Statistics	Run the Company Statistics report (PER001CH). This report provides information on employee wages, occupations, and other data necessary for the Company Statistics Report (Betriebszaehlung).

(ESP) Generating AFI Flat Files

This section provides an overview of the AFI (Affiliation to Social Security) process and discusses how to create an AFI flat file.

Understanding the AFI Process

For Spanish employers, PeopleSoft Human Resources includes an AFI process (SOCS_AFI_ESP) for reporting workforce changes to the Social Security General Treasury. The PeopleSoft process simplifies submissions by automatically creating a flat file in the format required by the Spanish authorities.

The AFI process generates a flat file that lists changes in workforce, such as hiring, terminations, personal or job data changes, for a given period. You run the process for a selected company and CCC (*Codigo Cuenta de Cotizacion*).

There are two ways to select the employees to include in the AFI file:

- By selecting the types of changes you want to report.

The system generates a list of employees who match the criteria and you can select the employees to include.

- By selecting specific employee IDs.

If you know which employees you want to include, you enter the employee IDs.

In addition to workforce changes, you can use the AFI process to send information requests to the Social Security General Treasury. Employers use these requests to obtain information about their employees' social security contributions.

Page Used to Generate AFI Flat Files

Page Name	Object Name	Navigation	Usage
AFI Generation	RC_SOCS_AFI_ESP	Workforce Administration, Workforce Reports, AFI Report ESP	Create an AFI flat file for an entire company, for a business unit, or for employees who meet certain criteria.

Creating an AFI Flat File

Access the AFI Generation page.

AFI Generation

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

Data to Print

AFI File Name: 02Q2HIRE .AFI
 Date From: 04/01/2002
 Date-To: 06/30/2002
 ☐ Test

Company Data

Company: KE1 Business Institute - Spain

CCC

	*SSN Employer	Main SS Nbr.	Inq.Cia.Sit.	Inq.Workers	Inq Prev CCC	Labor Life		
1	28214365546	☒	☐	☐	☐	☐	+	-

EmplID

☐ Hire
 ☐ Termination
 ☐ Contract
 ☐ Work Group
 ☐ Risk Code
 Select EE

	EmplID	Social Security Action	Action	Translate Short Name	Reason Code	Description		
1	KE0009	Hire	REH	Rehire	REH	Rehire	+	-

AFI Generation page

Data to Print

AFI File Name Enter the name of the file to be created.

Date From and Date To Enter the first and last dates of the period for which you want to generate an AFI file.

Test Select to run the process as a test. The process creates a flat file with a test flag that the Social Security General Treasury recognizes.

Company Data

Company Select the company for which to report data.

SSN Employer (social security number of the employer) Select the employer's social security number for which to report data. If you leave this field blank, the extract file contains data for all of the employer's social security numbers.

Main SS Nbr. (main social security number) Indicates whether this is the employer's primary social security number.

Inq. Cia. Sit. (inquire company situation) Select to request the information the Social Security General Treasury has about the company.

Inq. Workers (inquire workers)	Select to request the information the Social Security General Treasury has about current workers in the CCC.
Inq Prev CCC (inquire previous CCC)	Select to request the information the Social Security General Treasury has about previous movement in the CCC.
Labor Life	Select to request the information the Social Security General Treasury has about labor life in the CCC.

EmplID

There are two ways to select employees:

- Select one or more AFI flat file actions and click Select EE to display a list of employees who have those actions.
- Enter employees by EmplID.

Hire	Select to include employees who were hired.
Termination	Select to include employees who were terminated.
Contract	Select to include employees whose contracts changed.
Work Group	Select to include employees whose work group changed.
Risk Code	Select to include employees whose risk code changed.
Select EE	Click to select employees whose actions meet your criteria. The system automatically populates EmplID, Social Security Action, Action, and Reason Code for these employees.
EmplID	Enter the ID of the employee you want to include in the AFI flat file. You can delete an employee from the list generated when you clicked the Select EE button if you do not want to report information for the employee.
Social Security Action	Select the AFI flat file action to report for the employee.
Action	Select the internal action code to include in the AFI flat file for the employee.
Reason Code	Select the action reason to include in the AFI flat file for the employee.

(FRA) Providing Additional Information for French Employees

This section discusses how to:

- Track mandate information.
- Enter worker military service information.

Pages Used to Track Additional French Worker Information

Page Name	Object Name	Navigation	Usage
Mandates	MANDATES_FRA	Workforce Administration, Job Information, Mandates FRA	Track mandate information for your French workers.
Military Situation	MILIT_SITUATN_FRA	Workforce Administration, Personal Information, Biographical, Military Situation FRA	Enter worker military service information, including the branch of the armed forces the worker served in, his or her identification number, grade, and reserve status.

Tracking Mandate Information

Access the Mandates page.

Mandates

Levasseur, Jean-Pierre Employee EmpID: KF0015

Mandates - France Customize Find First 1 of 1 Last

	*Mandate Type	Mandate Begin Date	*Mandate End Date	Establishment ID	Hours
1	Staff Representative	06/02/1997	06/01/1999	KF001	20

Mandates page

Mandate Type

Select a mandate type.

Mandate Begin Date and Mandate End Date

Enter the mandate begin and end dates during which the worker was associated with the mandate type.

Establishment ID

Select an establishment ID.

Hours

Indicate the number of hours for the mandate, if appropriate.

Entering Worker Military Service Information

Access the Military Situation page.

Military Situation	
Levasseur, Jean-Pierre	Employee EmplID: KF0015
Military Status:	
Begin Date:	 To: 
Arm:	 Rank: 
Military Number:	
Position:	
☒ Military Appointment ☐ Individual Appointment ☐ None	
Notify by Military Reserve:	Date: 
Arm in the Reserve:	 Rank: 
Position in the Reserve:	
Notify by Individual Reserve:	Date:
Individual Position (Reserve):	

Military Situation page

Begin Date and To	Indicate the begin and end date for the worker's military service.
Arm	Enter the arm of the military in which the worker served.
Rank, Military Number, and Position	Indicate the worker's rank, military number, and position if known.
Military Appointment, Individual Appointment, and None	Indicate if the service was the result of a military appointment, an individual appointment, or none to indicate the worker wasn't appointed to the position.

If the worker had a Military Appointment, enter additional reserve information.

Notify by Military Reserve	Enter the appropriate Notify by Military Reserve information.
Date	Enter the date of notification.
Arm in the Reserve	Enter the worker's arm in the reserve.
Rank	Enter the worker's rank.

If the worker has an Individual Appointment, enter additional information.

Notify by Individual Reserve	Enter the appropriate Notify by Individual Reserve information.
Date	Enter the date of notification.
Individual Position (Reserve)	Enter the worker's individual position in the reserve.

(NLD) Recording and Reporting SAMEN Diversity Information for Dutch Workers

This section provides an overview of the SAMEN diversity law and SAMEN registration and discusses how to:

- Establish a worker's ethnic status.
- Run the NLD Law SAMEN Statistics report.

Understanding the SAMEN Diversity Law and SAMEN Registration

If you have a Dutch workforce, you'll need to track information on the national origin of an employee's birth parents. This establishes the ethnic status of workers, which complies with the SAMEN diversity law, Wet Stimuleren Arbeidsdeelname, or the "law to promote equal labor participation for persons of a different ethnic origin" in the Netherlands.

The SAMEN law provides for equal employment opportunities for immigrant workers and/or their children. The birth country of either the employee or one of the employee's parents designates if the employee qualifies as a SAMEN employee and can be recorded as such for reporting to the Dutch government. So children of immigrant workers are subject to this law as well, even if they were born in the Netherlands, and even if the parents have been naturalized in the meantime, as long as one of the parents was born in one of the SAMEN countries. Every two years, the Dutch Ministry Of Social Affairs reviews the list of countries that are designated as SAMEN countries. This decision depends mainly on employment statistics for immigrant workers from certain countries (and their children).

If the employee qualifies and has no objection to SAMEN registration, record the birth country of the employee's mother and father. When you select a birth country for the employee's parents, you can choose only from among those countries stored on the Country table (COUNTRY_TBL). The system indicates if the birth country is one of the SAMEN countries stored on the NLD SAMEN Country table. When the selected country is *IDN* (Indonesia), an additional category appears indicating an additional choice to fulfill SAMEN identification requirements.

Pages Used to Record and Report SAMEN Diversity Information

Page Name	Object Name	Navigation	Usage
SAMEN Registration	SAMEN_NLD	Workforce Administration, Personal Information, Diversity Compliance NLD, Law SAMEN Registration	Establish worker ethnic status to comply with the SAMEN diversity law for a qualifying Dutch worker.
WBEAA Data - NLD	RUNCTL_PER038_NL	Workforce Administration, Personal Information, Diversity Compliance NLD, Law SAMEN Report	Run the NLD Law SAMEN Statistics report (PER038NL).

Establishing a Worker's Ethnic Status

Access the SAMEN Registration page.

SAMEN Registration

Berg,Jeroen van deEmployeeEmplID: KN0001

Date of Birth:02/28/1946Birth Location:

☐ Objection Registration

☐ Included in Target Group

SAMEN Identification

Birth Country:NLDNetherlands☐ In Target Group

*Father's Birth Country:NLDNetherlands☐ In Target Group

*Mother's Birth Country:NLDNetherlands☐ In Target Group

SAMEN Registration page

Objection Registration	Select if the employee objects to being included in the SAMEN reporting to the Dutch government. If selected, the system won't include the employee when you generate the SAMEN report.
Included in Target Group	Select to include the employee in the SAMEN reporting to the Dutch government. This field is available for entry only when one parent comes from a target group.
SAMEN Identification	
Birth Country	Displays the employee's birth country. Note. The system always displays the employee's birth country and indicates if it is one of the SAMEN countries stored on the NLD SAMEN Country table.
Father's Birth Country and Mother's Birth Country	Select the birth country of the employee's father and mother.
Category	This field appears if a birth country is <i>IDN (Indonesia)</i>. Select one of the following values to fulfill SAMEN identification requirements: - Former Netherlands East Indies (Born in Indonesia before 27-12-1949) - Incl. Law Rietkerk-uitkering (In Register 1b, Rietkerk-uitkering law) - Indonesia (after 27-12-1949) (Born in Indonesia after 27-12-1949)

In Target Group

The system automatically selects this check box if the birth country for the employee, employee's father, or employee's mother is one of the countries stored on the NLD SAMEN County table.

Running the NLD Law SAMEN Statistics Report

Access the WBEAA Data - NLD page.

The Law SAMEN Statistics report (PER038NL) produces the required SAMEN statistics information related to the number of people in the workforce born in a so-called SAMEN country, or of whom one of the parents has been born in one such country.

(ITA) Recording Additional Hiring Data for Italian Workers

This section discusses how to:

- Record employee hiring documentation for libretto di lavoro and C1 declarations.
- Print the Employee Job Letter.
- Maintain the employee matricula book.

Pages Used to Record Additional Data for Italian Workers

Page Name	Object Name	Navigation	Usage
ITA Employee Documentation	EMPL_DOC_ITA	Workforce Administration, Job Information, Employment Categorization ITA, Documents	Record an employee's workbook code and employment eligibility or C1 declaration code and release date.
ITA Employee Job Letter	EMPL_JOBLTR_ITA	Workforce Administration, Job Information, Employment Categorization ITA, Job Letters	Use the ITA Employee Job Letter page to print the hiring letter to be signed by both employee and employer on or before the first day of employment. The page displays company, labor agreement and employee category information. Select the Print Letter check box and enter the date. Select Save to print the letter.
Empl Comp Cd Ita (employee company codes, Italy)	EMPL_COMP_CD_ITA	Workforce Administration, Job Information, Employment Categorization ITA, Company Codes	Use the Empl Comp Cd Ita page to link employees with company INAIL, INPS, PREV, INPDAI, and CIA codes.
Personal/Job Data	EMPL_MATR_BOOK_ITA	Workforce Administration, Job Information, Employment Categorization ITA, Matricula Book, Personal/Job Data	View or update data to be included on the Matricula book.
Address Data	EMPL_MTRBKADDR_ITA	Workforce Administration, Job Information, Employment Categorization ITA, Matricula Book,	View or update Matricula book address data.
ITA Matricula Book Calc	RUNCTL_MATRBK_ITA	Workforce Administration, Job Information, Employment Categorization ITA, Matricula Calculation	Run the Matricula Book Calc process to update the Matricula table.

Running the Matricula Book Calculation Process

Access the ITA Matricula Book Calc page.

ITA Matricula Book Calc

Run Control ID: 1
[Report Manager](#)
[Process Monitor](#)

Report Request Parameters

Company: K11 Business Institute - Italy

Employee Classes
[Find](#) | [View All](#)
First 1 of 1 Last

Regulatory Region: ITA Italy

Employee Classification: 3 White Collar

Allow Retro Calculation ☐

From Date: 11/19/2002 Thru Date:

Last Matricula: 0

Update ☐

ITA Matricula Book Calc page

- Employee Classification** Select the employee classification for this book.
- Allow Retro Calculation** Select this check box if you want to enable retroactive calculations to capture previously lost or missed matricula data.
- Last Matricula: Update** Select this check box if you want the process to check for new matricula data only.

(ITA) Recording End of Employment Information for Italian Workers

This section discusses how to record employee resignation dates and normal notice periods.

Page Used to Record End of Employment

Page Name	Object Name	Navigation	Usage
ITA Employee Terms	EMPL_TERMS_ITA	Workforce Administration, Job Information, Employee Categorization ITA, Terms	Record the date an employee resigns from your company and the normal notice period as required by the employee's contract.

Recording Employee Resignation Dates and Normal Notice Periods

Access the ITA Employee Terms page.

ITA Employee Terms

Doria, Mauro Mr. Employee EmplID: K10003 Empl Rcd#: 0

Notification Period Find | View All First 1 of 1 Last

Effective Date: 09/13/2000 Effective Sequence: 0

Reason Code: TAF Transfer to Affiliate

Notification Date: 07/16/2002 Last Day at Work: 08/02/2002

Notification Start Date: Notification End Date:

Special Termination Bonus: Withhold Notification Period ☐

Comment:

***Termination Carryover Item** Customize | Find | View All First 1 of 1 Last

Vacation	+	-

***Termination Payment Item** Customize | Find | View All First 1 of 1 Last

Last Salary	+	-

ITA Employee Terms page

Notification Date	Indicate the date the employee gave notice of intent to end the contract.
Last Day at Work	Enter the last day the employee will be at work.
Notification Start Date and Notification End Date	Enter the start and end dates of the period that the employee should work for the company after the notification date, according to the employee's contract.
Special Termination Bonus	Enter any bonus incentive owed to the employee.
Withhold Notification Period	This box is selected to indicate that the employee's salary is to be withheld during period between the notification start and end dates. This is an information only field.
Termination Carryover Item	Enter items that the employee can carryover for a termination. For example, during terminations like "Term for Transfer to Affiliate," the employee and the employer can decide to "freeze" some items that can be transferred to the same employee for the new hiring process in the new affiliate company.
Termination Payment Item	Enter items that should be paid after termination.

(ITA) Running the Equal Opportunities Report

This section discusses how to run the Italian Equal Opportunities report.

Page Used to Run the Equal Opportunities Report

Page Name	Object Name	Navigation	Usage
ITA Equal Opportunities	RUNCTL_PER053	Workforce Administration, Labor Relations, Reports, Equal Opportunities ITA	Run the ITA Equal Opportunities report (PER053). This report is submitted every two years and consists of eight different tables. All companies with 100 or more employees are required to submit this report.

Running the Equal Opportunities Report

Access the ITA Equal Opportunities page.

ITA Equal Opportunities

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English

Report Request Parameter(s)

From Date: 01/01/2001 End Date: 12/31/2001

Company: K11 Business Institute - Italy

City: Milan

Desired Reports

☒ Table 1 ☐ Table 3 ☐ Table 5 ☐ Table 7

☒ Table 2 ☐ Table 4 ☐ Table 6 ☐ Table 8

Productive Units Find First 1 of 1 Last

MIL01 Unita' Produttiva Milano 1

ITA Equal Opportunities page

Desired Reports

Select the Equal Opportunities report tables you want to populate.

Table 1 (Informazioni Generali Sull'azienda)

Table 1 contains the following information:

- Company and location information.
- Total number of employees as of December 31st of the second year of the period reported.
- Economic activity, including IVA organization codes.
- All CCNL information that applies.

Table 2 (Informazioni generali sulle unità nell'ambito comunale)

Table 2 contains the following information:

- Location address.
- Total number of employees at that location as of the reporting date.
- Number of employees as of December 31st of the second year of the period reported.

Table 3 (Entrate e uscite nel biennio)

Table 3 contains the following information:

- Number of employees as of December 31st of the first year of the period reported.
- The number of hires as of December 31st of the first year of the period reported.
- The number of terminations as of December 31st of the first year of the period reported.
- Number of employees as of December 31st of the second year of the period reported.

Table 4 (Occupati al 31.12 del secondo anno del biennio e promozioni e assunzioni nell'anno)

Table 4 lists the number of employees in each of the following categories: dirigenti, quadri, impiegati, and operai. Within each category, the report lists the number of employees per category level.

Table 5 (Occupati al 31.12 del secondo anno del biennio per tipo contratto. CIG e aspettativa)

Table 5 lists, per contract type, the number of employees in each of the following categories: dirigenti, quadri, impiegati, and operai.

Table 6 (Elenco delle entrate, uscite e trasformazioni contratto [secondo anno del biennio])

Table 6 contains the following information listed by category (dirigenti, quadri, impiegati e operai):

- Hires, including employees transferred from another location of the company, employees changed from another category, and new hires.
- Terminations, including employees transferred to another location of the company, transferred to another category, and termination of the labor relation (pension, resignation, contract expiration, individual or collective dismissal, death, and disability).
- Contract changes, including from *Determine Period* to *Undetermined*, from parttime to fulltime, and vice versa.

Table 7 (Formazione del personale svolta nel corso del secondo anno del biennio)

Table 7 contains the following information listed by category (dirigenti, quadri, impiegati, and operai):

- Number of training participants.
- Total of hours of training participation per category.

Table 8 (Retribuzione annua (secondo anno del biennio) per livello e categoria professionale)

The annual gross salary amount subdivided by category (dirigenti, quadri, impiegati, and operai) and contractual level.

Productive Units

Select the productive units of the employees on whom you're reporting.

(USA) Determining Foreign Nationals US Residency Status

This section discusses how to run the Substantial Presence test.

Page Used to Determine Eligibility

Page Name	Object Name	Navigation	Usage
Substantial Presence Test	PRESENCE_TEST	Workforce Administration, Personal Information, Citizenship, Employee Presence Test USA	Run the substantial presence test to determine if alien employees are considered U.S. residents for tax purposes for a given calendar year.

Running the Substantial Presence Test

Access the Substantial Presence Test page.

Substantial Presence Test

Lewis, Douglas Employee EmpID: KU0001

Calendar Information Find | View All First 1 of 1 Last

*Calendar Year: 2001

Days Present in Calendar Year: 0

Days Present in First Prior Year: 0

Days Present in Second Prior Year: 0

Total Days Used in Presence Test: 0

Visa Information Find | View All First 1 of 1 Last

Visa/Permit Type:

Visa/Permit Status: A Applied

Start Date:

Expiration Date:

Substantial Presence Test

☐ Alien Registration "Green" Card ☐ Passed 183 Day Test

☐ 31 Days in Calendar Year ☒ Did Not Pass 183 Day Test

Do not count days in which the employee was:

- In US less than 24 hours in transit
- Commuting from residence in Canada or Mexico
- Unable to leave US due to medical condition that developed in US
- An exempt individual:
 - Student with F, J, M Q visa - Exempt for five years
 - Teacher, trainee, researcher on J or Q visa - Exempt for two years

Substantial Presence Test page

Under this test, a foreign national is considered a resident for tax purposes if he or she is present in the U.S. at least 31 days in the current year and 183 days during the current year and the two preceding years, as determined under a weighted formula.

Nonresident aliens may make a special election to be treated as residents for the first year in which they are present in the U.S. This election is subject to several restrictions, one of which is that they must satisfy the substantial presence test in the year following the election.

Rules that govern which days don't count towards an employee's substantial presence test appear in the Do not count days in which the employee was: group box at the bottom of the page. This test is only valid for current or previous years.

Visa Information

If the employee has a visa/permit, this group box provides information about the visa/permit.

Calendar Information

Calendar Year Enter the appropriate calendar year.

Days Present in Calendar Year, Days Present in First Prior Year , and Days Present in Second Prior Year Enter the number of days present in the current year, the previous year, and the year previous to that.

The actual days present in the first prior year equal one third of 365 minus the Days Present in First Prior Year field. The actual days present in the second prior year equal one-sixth of 365 minus the Days Present in Second Prior Year field.

For example, enter the number of days present in 1998, followed by the number of days present in 1997, followed by the number of days present in 1996.

The Total Days Used in Presence Test field automatically displays the total number of days after the all the above fields are completed.

Note. If you are entering substantial presence test information for multiple years, the First Prior Year and Second Prior Year fields are based on the prior year information.

Substantial Presence Test

Alien Registration "Green" Card Select if the employee has been issued an alien registration card, or green card. If you select this check box, the substantial presence test isn't necessary; the employee is considered a U.S. resident for tax purposes.

31 Days in Calendar Year This check box is automatically selected if the employee has been present 31 days in a calendar year.

Perform Presence Test Click this button to see if the employee passed the substantial presence test. The system calculates the total number of days present and selects either the Passed 183 Day Test or Did Not Pass 183 Day Test option.

In the 183 Day Test calculation, the system uses 100 percent of the days present in the calendar year.

CHAPTER 11

(JPN) Tracking Additional Appointments (Kenmu)

This chapter provides an overview of additional appointments (*kenmu*) and discusses how to:

- Set up codes for tracking additional appointments.
- Set up security for tracking additional appointments.
- Activate the message subscription for handling terminations.
- Record and view employee additional appointments data.

Understanding Additional Appointments

Additional Appointments are tracked as additional jobs (employment record numbers) in the Job record. The Additional Appointment Information page enables tracking of multiple additional appointment rows for each main appointment row of the Job record. A separate Enter Cost Rate Information page enables the tracking of cost rate distribution among a main appointment and its additional appointments.

The system automatically increments employment record numbers, including additional appointments. The total number of additional appointments appears with main appointment data on the employee's Job Summary JPN page.

When additional appointments exist in conjunction with intercompany transfers, for example when you serve as a hosting company, you can store information about additional appointments your transferee may have in his home company, as well as any additional appointment information within your company as host.

On the Employee Assignment List report you can view employees by department including an employee's additional appointments.

When you terminate a main appointment, the system automatically terminates all additional appointments associated with it.

See Also

Chapter 13, "Updating Workforce Information," (JPN) Appointment Reporting for Job Data Changes, page 329

Internal and External Companies

Some of the pages used for tracking additional appointments distinguish between internal and external company appointments. Here are the definitions of internal and external companies:

Internal Companies

Companies that are internal to your organization's database. Data for these companies is already set up on the Company table and Department table.

External Companies

Companies that are external to your organization's database. You must set up data for these companies on the Intercompany Transfer Company/Department table.

Setting Up Codes for Tracking Additional Appointments

This section provides overviews of additional appointment setup, lists prerequisites, and discusses how to:

- Set up dummy codes for additional appointments.
- Designate dummy codes for the Job record.

Understanding Dummy Codes

Setup for additional appointment tracking requires the use of dummy codes.

Dummy Job Code

PeopleSoft provides a dummy job code for use with all additional appointments. The dummy job code is needed because additional appointment data is held on the Job record, which requires a job code. Since job codes are not tracked as part of additional appointment data, the dummy code is required to be able to save the Job record with additional appointment information. The dummy job code is only used in behind-the-scenes processing for saving and is never visible on any page except the Additional Appointment Setup page and the Job Code Table pages.

The PeopleSoft-provided dummy job code is *AADUMY*. The system automatically creates this job code for each new business unit that you define. If you have already created business units, we provide an application engine process that creates the dummy job code for each existing business unit. You only have to run the application engine one time. Subsequently, the system automatically creates the dummy job code when you define a new business unit.

See [Chapter 11, “\(JPN\) Tracking Additional Appointments \(Kenmu\),” Pages Used to Set Up Codes for Managing Additional Appointments, page 289.](#)

Dummy Business Unit, Company, Department, and Location Codes

When the additional appointment is in an external company, the business unit, company, department and location codes set up for the external company are on the IC Transfer setup tables only, which are not values used in the Job record. Therefore, you must define one dummy code for each of these required fields so that you can save Job record information for additional appointments to external companies. Set up and use the same codes for all additional appointments to external companies. PeopleSoft does not deliver these dummy codes.

The dummy codes are only used in behind-the-scenes processing for saving and are never visible on any page except the Additional Appointment Setup page.

Warning! The department code chosen can impact security, so it is important to create a new department code for which no one has security access. Anyone who can access the dummy department through security will be granted access to all main appointments that have an external assignment.

See Also

Chapter 11, “(JPN) Tracking Additional Appointments (Kenmu),” Setting Up a Dummy Business Unit, Company, Department, and Location, page 289

Chapter 11, “(JPN) Tracking Additional Appointments (Kenmu),” Designating Job Record Codes for Additional Appointments, page 290

Understanding Setup Steps for Additional Appointments

The setup steps for additional appointment tracking vary slightly depending upon whether you:

- Initially implement PeopleSoft Human Resources with additional appointment tracking before you set up business units.
- Add additional appointment tracking after you have already set up business units, such as during upgrade.

Both situations require that you create dummy codes and assign them on the Additional Appointment Setup page. The details of how to do this are presented in later sections.

When Business Units Have Not Been Defined

Here are the steps for setting up additional appointment tracking when you have not yet defined business units:

1. Select Additional Appointment Enabled in the Japanese Parameters section of the Installation Table – Country Specific page.
2. Set up your organization’s business units on the Business Unit page.

The system automatically creates the dummy job code *AADUMMY* for each business unit that you define.

3. Create a dummy business unit, company, department, and location for use with additional appointments to external companies.
4. Assign the dummy codes on the Additional Appointment Setup page.
5. (Optional) Set up additional appointment security.

When Business Units Have Already Been Defined

If you are setting up additional appointment tracking when you have already defined business units, such as when upgrading, the steps are the same as listed in the previous section with the exception of step 2:

1. Select Additional Appointment Enabled in the Japanese Parameters section of the Installation Table – Country Specific page.
2. Run the AA_JOBCODE_JAPAN application engine process to create the dummy job code *AADUMMY* for each business unit in your system.

You only have to run the application engine process one time. Subsequently, the system automatically creates the dummy job code for each business unit that you define.

3. Create a dummy business unit, company, department, and location for use with additional appointments in external companies.
4. Enter the dummy codes on the Additional Appointment Setup page.
5. (Optional) Set up additional appointment security.

See Also

Chapter 11, “(JPN) Tracking Additional Appointments (Kenmu),” Setting Up Security for Tracking Additional Appointments, page 290

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Installing PeopleSoft HRMS”

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Setting Up Organization Foundation Tables,” Adding, Updating, and Identifying Business Units

Prerequisites

If you plan to track additional appointments in external companies, you must set up the following for the external companies:

- Set up company and department IDs for external company appointments on the IC Trans External Company/Dept page.

See Chapter 4, “Setting Up Country-Specific Tables,” (JPN) Setting Up Intercompany Transfer Company Data, page 33.

- Set up supervisor levels for external company appointments on the IC Trans External Superv Lvl page.

See Chapter 4, “Setting Up Country-Specific Tables,” (JPN) Setting Up Japanese Supervisor Levels, page 34.

These codes provide the prompt values on the Edit Additional Appointment Information page and are visible on pages that display employee additional appointment data.

Pages Used to Set Up Codes for Managing Additional Appointments

Page Name	Object Name	Navigation	Usage
IC Trans External Company/Dept	INTCPX_CPY_JPN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, IC Trans External Company/Dept	Set up company and department codes for intercompany transfers to and additional appointments in external companies.
IC Trans External Superv Lvl	INTCPX_SPV_JPN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, IC Trans External Superv Lvl	Set up supervisor level codes for intercompany transfers to and additional appointments in external companies.
Additional Appointment Setup for Existing Business Units	RC_AA_JOBCODE_JPN	Set Up HRMS, Install, Product and Country Specific, AA Setup for Existing BUs JPN	Run the AA_JOBCODE_JPN application engine process to create the dummy AADUMMY job code for each existing business unit. Do this only if business units already exist at the time of implementing additional appointment tracking. You only run this process one time.
Additional Appointment Setup	AA_SETUP_JPN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, Additional Appointment Setup	Enter the dummy business unit, company, department, location, and job codes to populate required entry fields on the Job record for additional appointments.

Setting Up a Dummy Business Unit, Company, Department, and Location

Set up one dummy code to be used with all additional appointments for each of the following:

- Business unit.

See *PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, “Setting Up Organization Foundation Tables,” Adding, Updating, and Identifying Business Units.

- Company.

See *PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, “Setting Up Organization Foundation Tables,” Entering Company Information.

- Department.

See *PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, “Setting Up Organization Foundation Tables,” Maintaining Departments.

- Location.

See *PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, “Setting Up Organization Foundation Tables,” Establishing Locations.

Additional Setup Instructions

The following are important points to keep in mind when setting up these dummy codes for use with additional appointments to external companies:

- We recommend that the business unit, company, department, and location that you set up as dummy codes for use with additional appointments to external companies not be real business unit, company, department, and location codes due to possible affect on security and reporting.
- You may use a real, existing SetID to define the dummy codes.
- The dummy department must be excluded from the department tree.

Otherwise, anyone who has access to the dummy department has access to *all* main appointments of employees who have an additional appointment in an external company.

See Also

Chapter 11, “(JPN) Tracking Additional Appointments (Kenmu),” Understanding Dummy Codes, page 286

Designating Job Record Codes for Additional Appointments

Access the Additional Appointment Setup page.

Additional Appointment Setup

*Business Unit:	DUMMY		Dummy Business Unit
*Company:	DUM		Dummy Company
*Department:	DUM_DEPT		Dummy Department
*Location Code:	DUM_LOC		Dummy Location
*Job Code:	AADUMY		Additional Appointment

Additional Appointment Setup page

The prompt values for Business Unit, Company, Department, and Location Code are the valid codes set up in the respective setup tables for your PeopleSoft database. In each field, select the single dummy code that you defined for use with additional appointments.

Job Code *AADUMY* is the default value.

The system uses the values on this page to populate the Job record so that it can be saved.

Setting Up Security for Tracking Additional Appointments

This section provides an overview of additional appointment security and discusses how to:

- Set up the security basis for additional appointments.
- Select reports that use additional appointment security.

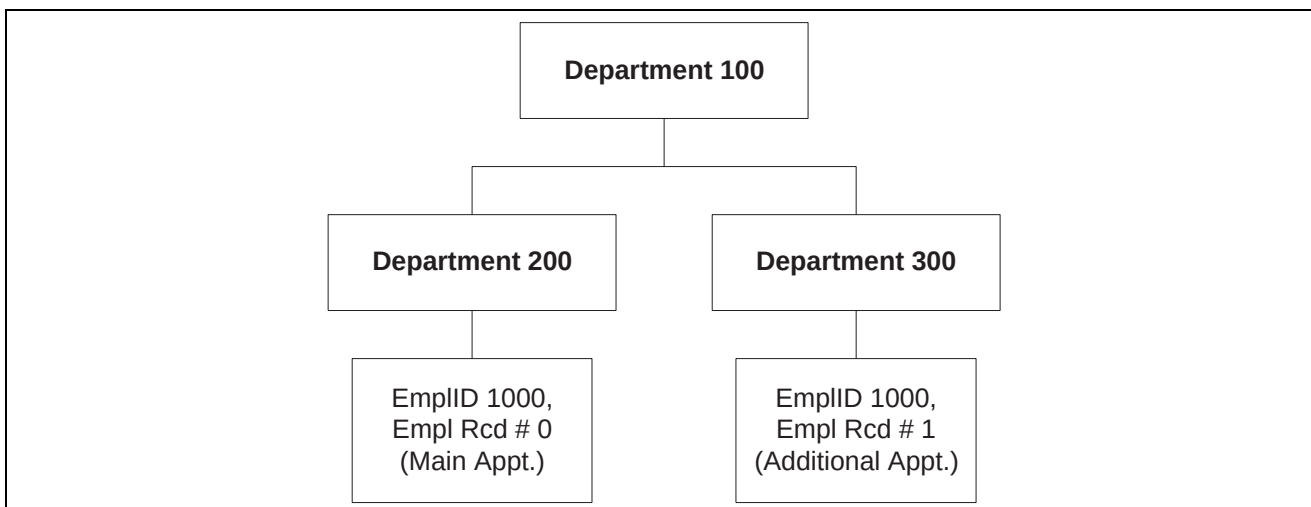
Understanding Security for Additional Appointments

We provide two security options for accessing additional appointment data. You select one of the following values on the Change Security Basis page:

Departmental Security	If you select this option, additional appointments do not provide any additional security access. The user must have access to the department in which the main appointment resides in order to access an employee's data.
Additional Appointment JPN	If you select this option, additional appointments do provide additional security access. A user can view the main appointment if the main appointment or any of its additional appointments resides in a department to which the user has access.

Example of Security Access

This illustration of security access is based on the following department security tree:



Sample Department Security Tree

Here is how the security works for the security options you can select on the Change Security Basis page:

- If you select Departmental Security:
 - If the user has access to department 200, then the user has access to employee 1000's data.
 - Even if the user has access to department 300, the user does not have any access to employee 1000's data.
- If you select Additional Appointment JPN:
 - If the user has access to department 200, then the user has access to employee 1000's data.
 - If the user has access to department 300 only, then the user can access employee 1000's data because the employee has an additional appointment in department 300.

Note. Security access is dependent upon the system date being earlier than the effective date of the release of the additional appointment. Security access to the data row ceases with the effective date of the additional appointment release.

Pages Used to Set Up Security for Additional Appointments

Page Name	Object Name	Navigation	Usage
Change Security Basis	CHG_SECURITY	Set Up HRMS, Security, Change Row Security Basis	Switch between Departmental Security, Additional Appointment Security JPN, and None (no security) for your data permission security type. Departmental Security is the default security type for PeopleSoft HRMS.
AA Security JPN	AA_SECURITY_JPN	Set Up HRMS, Security, Addl Appt Rpt Security JPN	Select the reports that use additional appointment security.

Setting Up the Security Basis for Additional Appointments

On the Change Security Basis page, select the security basis that determines which main appointment records a user can access.

See Also

Chapter 11, “(JPN) Tracking Additional Appointments (Kenmu),” *Understanding Security for Additional Appointments*, page 291

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Administering PeopleSoft Security,” Choosing a Security Type

Selecting Reports That Use Additional Appointment Security

Access the AA Security JPN page.

The screenshot shows the 'AA Security JPN' page. At the top is a tab labeled 'AA Security JPN'. Below it is a 'Component Detail' section with a table. The table has columns for 'Component Name' and 'Additional Appt Security'. There are two rows of data, both with checkboxes checked in the 'Additional Appt Security' column. The first row is for 'RUNCTL_NTF_JPN' and the second is for 'RUNCTL_PER062_JPN'. To the right of each row are '+' and '-' buttons. Above the table, there are links for 'Customize' and 'Find', and navigation controls for 'First', '1-2 of 2', and 'Last'.

Component Detail		Customize	Find	First	1-2 of 2	Last
	*Component Name	Additional Appt Security				
1	RUNCTL_NTF_JPN	☒		+	-	
2	RUNCTL_PER062_JPN	☒		+	-	

AA Security JPN page

If you select Additional Appointment JPN as your security basis on the Change Security Basis page, you must select the run control component of the reports to which you want additional appointment security to apply. The following table lists the only reports that can be enabled for additional appointment security and the component name to select on this page:

Report ID	Report Name	Component Name
PER062JP	Grade Advance Candidate List	RUNCTL_PER062_JPN
PER063JP	Appointment Notification JPN	RUNCTL_NTF_JPN
PER064JP	Appointment List JPN	RUNCTL_NTF2_JPN
PER065JP	Completion of IC Transfer JPN	RUNCTL_PER065_JPN
PER066JP	Employee Assignment List JPN	EMP_ASN_LST_JPN

For other reports, the only way to see information on the main appointment is to have access to the department on which the main appointment resides. The department of the additional appointment does not provide any additional access for any reports other than the five reports listed here, even when additional appointment security is activated.

The purpose of activating additional appointment security for these reports is to display the main appointments when there is security access to the additional appointment. Activating additional appointment security does not display additional appointments on PER062JP, PER063JP, PER064JP, and PER065JP. Only PER066JP displays additional appointments.

When additional appointment security is activated for these five reports, only current job information is evaluated. Future-dated job rows, such as future-dated hires or terminations, are ignored. Regardless of the security option selected, only the current row is used to determine security access.

See Also

Chapter 11, “(JPN) Tracking Additional Appointments (Kenmu),” Understanding Security for Additional Appointments, page 291

Setting Up to Handle Additional Appointment Terminations

When you terminate a main appointment, the system employs a message subscription that uses a component interface to automatically terminate all additional appointments associated with it.

The message subscription is delivered inactive; you must activate it if you use additional appointment functionality. Following are the details you need to activate the subscription:

Message subscription	Termination_Add_Appt
Message name	WORKFORCE_SYNC
Channel	PERSON_DATA
Tables written to	JOB

Termination rows are inserted for all active additional appointments associated with the terminated main appointment.

See Also

PeopleTools 8.42 PeopleBook: PeopleSoft Enterprise Integration

Recording and Viewing Employee Additional Appointments Data

This section discusses how to:

- Add a new additional appointment or access an existing one from the Additional Appointment Information page.
- Record details of the addition, change, or release of the additional appointment on the Edit Additional Appointment Information page.
- Distribute cost among the main and additional appointments on the Enter Cost Rate Information page.
- View additional appointment history on the Job Summary JPN and Additional Appointment Data pages.

Note. To access additional appointment data, you must first access the associated main appointment in the search page.

Pages Used to Record and View Additional Appointment Information

Page Name	Object Name	Navigation	Usage
Additional Appointment Information	AA_MGMT_JPN	Workforce Administration, Job Information, Additional Appointment JPN	Add, change, or release additional appointments.
Edit Additional Appointment Information	AA_MGMT_JPN_SEC	Click the Add or Edit button on the Additional Appointment Information page.	Record details of additional appointments.
Enter Cost Rate Information	AA_MGMT_JPN	Workforce Administration, Job Information, Cost Rate JPN	Distribute the cost of a main appointment among its additional appointments.
Job Summary JPN	JOB_SUMMARY_JPN	Workforce Administration, Job Information, Review Job Information, Job Summary JPN	View an employee's job history, including additional appointment total. Access details of additional appointments.
Additional Appointment Data	ADD_APPT_SUMM_SEC	Click the View link for an Additional Appointment on the Job Summary JPN, Work Location page.	View details of additional appointments in the Job Summary JPN.

Adding, Changing, or Releasing Additional Appointments

Access the Additional Appointment Information page.

Additional Appointment Information

Chiba,Daisuke
Employee
EmplID: KJ1002
Empl Rcd#: 0

Main Appointment

Company:	KJ1	Business Institute - Japan	Location:	KJ02	Osaka
Business Unit:	JPN01	Japan Business Unit	Job Code:	790000	Sales Mgr
Department:	21500	Sales and Marketing - Osaka	Supervisor Level:	KJ040	Manager

Additional Appointments

Customize | Find |  First 1 of 1 Last

Empl Rcd Nbr	Effective Date	Status as of	Company	DeptID	Dept	Supv Lvl	Edit
1	01/06/2003	Active	BusSoft	KJA030	Finance	VP	Edit

Add

Additional Appointment Information page

Additional Appointments

This section of the page displays information about existing additional appointments.

Empl Rcd Nbr (employment record number) The system assigns this number when you add an additional appointment. The system increments the employment record numbers whether an additional appointment or a concurrent job is added. (Concurrent jobs may be added to the system for the purpose of tracking intercompany transfers in a multicompany implementation or for adding a global assignment record.)

Effective Date The effective date of the latest data row for the employment record number. This date might be later than the system date if additional appointment information was entered with an effective date in the future.

Status as of The status of the appointment as of the date displayed in the Effective Date field for this employment record number. Values are *Active* and *Inactive*.

Edit Click to access the Edit Additional Appointment Information page, where you can change or release the selected additional appointment.

Add Click this button to add an additional appointment. You're transferred to the Edit Additional Appointment Information page, where you record the details of the new appointment.

Recording Additional Appointment Details

Access the Edit Additional Appointment Information page.

Edit Additional Appointment Information

Additional Appointment Information

Chiba,DaisukeEmployeeEmplID: KJ1002Empl Rcd#: 0

Additional AppointmentFind | View AllFirst1 of 1Last

Empl Rcd Nbr: 1*Effective Date: 01/06/2003Action Reason: Asn Kenmu

Start Date: 01/06/2003Expected End Date:End Date:

Internal Company Appointment

Company:Business Unit:Department:Location:Supervisor Level:

External Company Appointment

Ext Company: KJABusSoftExt DeptID: KJA030FinanceExt Supv Lvl: KJS020VP

Edit Additional Appointment Information page

Additional Appointment

Empl Rcd Nbr (employment record number)

The system assigns this number when you add an additional appointment. The system increments the employment record numbers whether an additional appointment or a concurrent job is added. (Concurrent jobs may be added to the system for the purpose of tracking intercompany transfers in a multicompany implementation or for adding a global assignment record.)

Action Reason

Three action reason codes are valid for additional appointments:

Asn Kenmu (assign kenmu): If you access this page by clicking the Add button on the Additional Appointment Information page, the system enters *Asn Kenmu* and you cannot change it. If you access the page using the Edit button, you cannot save the page if you select *Asn Kenmu*.

Data Chg (data change): Select this value if you are changing (but not releasing) an additional appointment.

Rel Kenmu (release kenmu): Select this value if you are releasing the kenmu assignment.

Note. The codes you enter on this page are translated into action and reason codes on the Job record as follows:

Asn Kenmu: The Job record action is *ADL* (additional job) and the reason is *AKM* (assign kenmu).

Data Chg: The Job record action is *DTA* (data change) and there is no action reason associated with it.

Rel Kenmu: The Job record action is *TER* (termination) and the reason is *RKM* (release kenmu).

These Job record rows are not visible to users.

Start Date

Enter the date on which this additional appointment starts.

Expected End Date

Enter the date on which the additional appointment is expected to end.

End Date

Enter the date on which the additional appointment actually ends.

Note. The system displays a warning if the End Date value is later than the Effective Date value of the additional appointment release. Security access to the data row ceases with the effective date of the additional appointment release.

Note. You can enter information in either the Internal Company Appointment group box or the External Company Appointment group box. You cannot use both group boxes at the same time.

Internal Company Appointment

Use this group box if the additional appointment is with a company that is included in your organization's database (internal company).

See [Chapter 11, "\(JPN\) Tracking Additional Appointments \(Kenmu\)," Internal and External Companies, page 285](#).

External Company Appointment

Use this group box if the additional appointment is with a company that is outside of your organization's database (external company). Prompt values come from the data you set up on the IC Trans External Company/Dept page and the IC Trans External Superv Lvl page.

See Also

[Chapter 11, "\(JPN\) Tracking Additional Appointments \(Kenmu\)," Prerequisites, page 288](#)

Distributing Cost

Access the Enter Cost Rate Information page.

Enter Cost Rate Information

Chiba,Daisuke Employee **EmplID:** KJ1002 **Empl Rcd#:** 0

Main Appointment			
Company:	KJ1	Business Institute - Japan	Location: KJ02 Osaka
Business Unit:	JPN01	Japan Business Unit	Job Code: 790000 Sales Mgr
Department:	21500	Sales and Marketing - Osaka	Supervisor Level: KJ040 Manager

Cost Rate History		Find View All	First	1 of 1	Last
Effective Date:	01/06/2003				
Main and Additional Appointment Cost Rates					
Empl Rcd Nbr	Company	DeptID	Dept	Supv Lvl	Cost Rate
0	Main Appt				35.00
1	BusSoft	KJA030	Finance	VP	65.00
Total Cost Rate:					100.00

Enter Cost Rate Information page

Effective Date Enter an effective date for the date that the additional appointment cost rates are being distributed or redistributed.

Main and Additional Appointment Cost Rates

Empl Rcd Nbr (employment record number) Choose the employment record number for each main or additional appointment that has an associated cost. The only values available in the list are the record numbers of additional appointments associated with the main appointment that you entered to access the page.

When you save the page, the system validates that the employment record chosen is active as of the selected effective date.

Cost Rate Enter the percentage cost associated with the main appointment and each additional appointment.

Total Cost Rate When you save the page, the system validates that the total cost rate for the main appointment and all of its additional appointments equals 100 percent.

CHAPTER 12

(JPN) Tracking Intercompany Transfers (Shukkou)

This chapter provides an overview of tracking intercompany transfers and discusses how to:

- Set up employee data for intercompany transfers.
- Enter and maintain home/host data for intercompany transfers.
- Work with search page security.
- Run the Intercompany Transfer report.

Understanding the Tracking of Intercompany Transfers

Whenever you need to track intercompany transfers (*shukkou*), whether as a home company or a host company, you enter a new job record with standard actions such as transfer, retirement, and hire, but with specific intercompany transfer-related action reasons. You can use the Pay Group field on Job Data - Payroll page to indicate which company is the compensation owner.

Summary of Home/Host Data for Intercompany Transfers

The tables in the two sections that follow provide summarized data entry obligations and requirements for different intercompany transfer scenarios. The first deals only with the hosting of intercompany transfers, the second with both temporary and permanent intercompany transfers.

In a later section, we provide details of data entry for a series of scenarios.

See [Chapter 12, “\(JPN\) Tracking Intercompany Transfers \(Shukkou\),” Entering and Maintaining Home/Host Data for Intercompany Transfers, page 304.](#)

Key to abbreviations used in the two tables:

Code	Description	Action
TICT	Temporary Intercompany Transfer	Zaiseki-Shukkou
PICT	Permanent Intercompany Transfer	Tenseki-Shukkou
HICT	Hosting Intercompany Transfer	Shukkou-Ukeire

Code	Description	Action
HTICT	Hosting Temporary Intercompany Transfer	Zaisekki-Shukkou no Ukeire
HPICT	Hosting Permanent Intercompany Transfer	Tenseki-Shukkou no Ukeire
SL	Supervisor Level	Yakushoku

Hosting Temporary and Permanent Intercompany Transfers

The following table summarizes the information and security requirements for hosting temporary intercompany transfers from companies within a group that uses PeopleSoft HRMS and from other companies that don't use PeopleSoft HRMS.

ICT Type	PA Location	Information required and security for ICT within affiliated companies that use PeopleSoft HRMS	Information required and security for ICT to affiliated companies not using PeopleSoft HRMS
1 HTICT	Host (Own Company)	• Host company info using shared codes (in case of PS group-Company). • The owner of payroll. • ICT period, department, SL, and so on. • In general, employee information is maintained at host (own) company when PA is moved from his or her own company.	• Host company information using Intercompany Transfer Company /Department and IC Transfer Supervisor Level codes. • The owner of payroll. • ICT period.
2 HPICT	Host (Own Company)	Employee information is maintained at host (own) company only.	Host company information using Intercompany Transfer Company /Department and IC Transfer Supervisor Level codes.

Temporary and Permanent Intercompany Transfers

The table in this section summarizes the information and security requirements for temporary intercompany transfers to companies within a group that uses PeopleSoft HRMS and to other companies that don't use PeopleSoft HRMS.

ICT Type	PA Location	AA at Home Company?	Information required and security for ICT within affiliated companies the use PeopleSoft HRMS	Information required and security for ICT to affiliated companies not using PeopleSoft HRMS
Temporary Intercompany Transfer	Host	No	• Host company information using shared codes (in case of PS – using group–company). • The owner of payroll. • TICT period, department, SL, and so on. • In general, employee information is maintained at host (own) company when PA is moved from his or her own company.	• Host company information using Intercompany Transfer Company /Department and IC Transfer Supervisor Level codes. • The owner of payroll. • TICT period.
Permanent Intercompany Transfer	N/A Retire	N/A	Employee information will be maintained at host company only.	N/A

Prerequisites

Before you enter intercompany transfers for an employee, you must set up the following intercompany transfer company data:

- Set up a “dummy” paygroup to use as the compensation indicator if you track intercompany transfers in which the host company (i.e, not your company) is responsible for paying the employee.

Note. This works in reverse if your company is the hosting company, that is, you set up a ‘dummy’ paygroup to track hosted IC transfers where the home company pays the employee.

- Set up company and department codes to use for tracking intercompany transfers to/from companies not registered in the Company Table.
- Set up supervisor level and IC Trans External supervisor level codes to use for tracking intercompany transfers to/from companies not registered in the Company Table.

Note. You can track intercompany transfers (*shukkou*) as additional appointments (*kenmu*) if you set up and use the additional appointment functionality.

See Also

[Chapter 4, “Setting Up Country-Specific Tables,” \(JPN\) Setting Up Intercompany Transfer Company Data, page 33](#)

[Chapter 4, “Setting Up Country-Specific Tables,” \(JPN\) Setting Up Japanese Supervisor Levels, page 34](#)

[Chapter 11, “\(JPN\) Tracking Additional Appointments \(Kenmu\),” page 285](#)

[Chapter 12, “\(JPN\) Tracking Intercompany Transfers \(Shukkou\),” Indicating the Home or Host Compensation Owner , page 304](#)

Setting Up Employee Data for Intercompany Transfers

This section discusses how to:

- Set up intercompany transfers on the Job Data - Work Location page.
- Indicate the compensation owner on the Job Data - Payroll page.

Note. This section tells you the basics of how to set up an intercompany transfer. See the next section for detailed examples of data entry and maintenance.

See Also

[Chapter 12, “\(JPN\) Tracking Intercompany Transfers \(Shukkou\),” Entering and Maintaining Home/Host Data for Intercompany Transfers, page 304](#)

Tracking Intercompany Transfers

Whenever you need to track intercompany transfers, whether as a home company or a host company, here’s how you set up the employee data:

- Enter a new job record with standard actions such as transfer, retirement, and hire, but with specific intercompany transfer-related action reasons.
- Complete the Intercompany Transfer fields on the Japan section of the Work Location Page.

Selecting Actions and Reasons for Intercompany Transfers

These are the actions and reasons that you use in the Administer Workforce pages when you deal with intercompany transfers:

Action	Reason
Transfer	Intercompany Transfer
	Completion of Intercompany Transfer
Retirement	Permanent Intercompany Transfer
	Completion of (hosted) Intercompany Transfer.
Hire	Temporary Company Transfer
	Permanent Intercompany transfer

See Also

Chapter 6, “Hiring Your Workforce,” Entering Employee Job Location and Position Information, page 85

Indicating the Home or Host Compensation Owner

You can use the Pay Group field on the Job Data - Payroll page to identify whether the home or the host company is responsible for paying an employee on temporary intercompany transfer. If the home company is paying, put the employee in a standard pay group with other employees. If the host company is paying, put the employee in a designated “dummy” pay group that has no payroll processing implications for your (home) company.

Similarly, if you are the host for a temporary intercompany transfer, put the employee in a standard pay group if you are paying the employee or into a designated dummy pay group if the home company is paying the employee.

Note. When Payroll System is set to *Other* on the Job Data - Payroll page, the Pay Group field is not a required field. You can use the field as described previously whether it is required or not.

See Also

Chapter 6, “Hiring Your Workforce,” Entering Employee Payroll Processing Data, page 106

Entering and Maintaining Home/Host Data for Intercompany Transfers

The following three sets of scenarios detail the data input and maintenance requirements by the home or host company as indicated. Sets B and C are similar, but reflect different security conditions.

The sets of scenarios are:

- Set A: Single Company Using a Single PeopleSoft HRMS Database.

- Set B: Multiple Companies Using a Single PeopleSoft HRMS Database (with security restrictions).
- Set C: Multiple Companies Using Single PeopleSoft HRMS Database (without security restrictions).

Single Company Using Single HR Database: Scenarios A1-8

This section discusses several scenarios for a single company using a single HR database.

Note. Concurrent Jobs isn't used for any scenarios in Set A. Also, the scenarios in Set A are applicable where multiple companies use a single HR database but the information—for the home or host company relevant to a particular intercompany transfer—is not stored in that database.

Scenario A1: Temporary Intercompany Transfer (TICT)

Home Company Inputs

Table	Fields	Input
JOB	Action	Transfer.
	Reason	Temporary Intercompany Transfer.
	Department ID	Department ID that indicates Temporary Intercompany Transfer.
	Pay Group	If home (own) company responsible for compensation, no change to pay group. If not, enter dummy pay group to indicate that the host (other) company is responsible for compensation. There is no processing associated with dummy pay groups.
JOB_JR	Intercompany Transfer Flag	Host Company Information.
	Business Unit code	If the Home company is a normal (internal) company, enter code. If not, leave blank.
	Company code	If the Host company is a normal (internal) company, enter code. If it is an external company, enter ICT Company code.
	Department code	If the Host company is a normal (internal) company enter Department code. If it is an external company, enter ICT Department code.
	Sup Lvl ID code	If the Host company is a normal (internal) company, enter Sup Lvl ID. If it is an external company, enter ICT Sup Lvl ID.

Table	Fields	Input
	ICT Start Date	Actual start date of intercompany transfer (ICT).
	ICT End Date	Expected end date of ICT.

Host Company Inputs

Not applicable.

Scenario A2: Completion of TICT*Home Company Inputs*

Table	Fields	Input
JOB	Action	Transfer.
	Reason	Completion of ICT.
	Department ID	Home company department employee will be in.
	Pay Group	Home company pay group employee will be in.

Host Company Inputs

Not applicable.

Scenario A3: Permanent Intercompany Transfer (PICT)*Home Company Inputs*

Table	Fields	Input
Job	Action	Retirement.
	Reason	Permanent Intercompany Transfer.
JOB_JR	Intercompany Transfer Flag	Host Company Information.
	Business Unit (code)	If the Home/Host company is a normal (internal) company, enter code. If not, leave blank.

Table	Fields	Input
	Company code	If the Host company is a normal (internal) company, enter code. If it is an external company, enter ICT Company code.
	Department code	If the Host company is a normal (internal) company enter Department code. If it is an external company, enter ICT Department code.
	Sup Lvl ID code	If the Host company is a normal (internal) company, enter Sup Lvl ID. If it is an external company, enter ICT Sup Lvl ID.

Host Company Inputs

Not applicable.

Scenario A4: Hosting Temporary Intercompany Transfer (TICT)*Home Company Inputs*

Not applicable.

Host Company Inputs

Table	Fields	Input
JOB	Action	Hire.
	Reason	Temporary Intercompany Transfer.
	Pay Group	If host (own) company responsible for compensation, enter pay group that you want the employee in. If not, enter dummy pay group to indicate that the home (other) company is responsible for compensation.
	Employee Class	Hosting Intercompany Transfer.
JOB_JR	Intercompany Transfer Flag	Home Company Information.
	Business Unit (code)	If the Home/Host company is a normal (internal) company, enter code. If not, leave blank.
	Company code	If the Host company is a normal (internal) company, enter code. If it is an external company, enter ICT Company code.

Table	Fields	Input
	Department code	If the Host company is a normal (internal) company enter Department code. If it is an external company, enter ICT Department code.
	Sup Lvl ID code	If the Host company is a normal (internal) company, enter Sup Lvl ID. If it is an external company, enter ICT Sup Lvl ID.
	ICT Start Date	Actual start date of intercompany transfer (ICT).
	ICT End Date	Expected end date of ICT.

Scenario A5: Completion of Hosting TICT

Home Company Inputs

Not applicable.

Host Company Inputs

Table	Fields	Input
JOB	Action	Retirement
	Reason	Completion of TICT

Scenario A6: Hosting Permanent Intercompany Transfer (PICT)

Home Company Inputs

Not applicable.

Host Company Inputs

Table	Fields	Input
JOB	Action	Hire.
	Reason	Permanent Intercompany Transfer.
	Pay Group	Pay group that you want this employee in.
	Employee Class	Hosting Intercompany Transfer.

Table	Fields	Input
JOB_JR	Intercompany Transfer Flag	Home Company Information.
	Business unit code	If the Home/Host company is a normal (internal) company, enter code. If not, leave blank.
	Company code	If the Host company is a normal (internal) company, enter code. If it is an external company, enter ICT Company code.
	Department: code	If the Host company is a normal (internal) company enter Department code. If it is an external company, enter ICT Department code.
	Sup Lvl ID code	If the Host company is a normal (internal) company, enter Sup Lvl ID. If it is an external company, enter ICT Sup Lvl ID.

Multiple Companies Using Single HR Database: Scenarios B1-6

This section discusses several scenarios for multiple companies using a single HR database.

Note. Concurrent Jobs is used for all scenarios in Set B.

Conditions:

- Both home and host companies use the same database and Business Unit, Company, Department ID, and Supervisor Level ID.
- Security settings make it impossible for either company to access the other's information.

Scenario B1: Temporary Intercompany Transfer

Home Company Inputs (Temporary Intercompany Transfer - TICT)

Table	Fields	Input
JOB	Action	Transfer.
	Reason	Temporary Intercompany Transfer.
	Department ID	Dummy ID that indicates Temporary Intercompany Transfer.

Table	Fields	Input
	Pay Group	If home (own) company is responsible for compensation, no change to pay group. If not, enter dummy pay group to indicate that the host (other) company is responsible for compensation. There is no processing associated with dummy pay groups.
	Job Indicator	Because host company enters information using concurrent jobs functionality, it is <i>Secondary</i> .
JOB_JR	Intercompany Transfer Flag	Host Company Information.
	Business unit code	Business unit that employee will be sent to.
	Company code	Host company that employee will be sent to.
	Department ID code	Host department that employee will be in.
	Sup Lvl ID code	Supervisor level that employee will take in host company.
	ICT Start Date	Actual start date of intercompany transfer (ICT).
	ICT End Date	Expected end date of ICT.

Host Company Inputs (Hosting Temporary Intercompany Transfer - TICT)

Table	Fields	Input
JOB	Employee ID	If accessing through Concurrent Jobs or Job Data, use the same Employee ID as home company. If accessing through Hire, assign a new ID.
	Employee Record #	Employee ID is 1 or higher.
	Action	Hire.
	Reason	Temporary Intercompany Transfer.
	Company	Host company.

Table	Fields	Input
	Department ID	Host department that employee will be in.
	Pay Group	If host (own) company is responsible for compensation, pay group that you want this employee in. If not, enter dummy pay group to indicate that the home (other) company is responsible for compensation.
	Employee Class	Hosting Intercompany Transfer.
	Job Indicator	Primary.
JOB_JR	Intercompany Transfer Flag	Home Company Information.
	Business unit code	Business unit employee comes from.
	Company code	Employee's home company.
	Department ID code	Employee's home department.
	ICT Start Date	Actual start date of intercompany transfer (ICT).
	ICT End Date	Expected end date of ICT.

Scenario B2: Completion of Temporary Intercompany Transfer

Home Company Inputs (Completion of Temporary Intercompany Transfer)

Table	Fields	Input
JOB	Action	Transfer.
	Reason	Completion of Temporary Intercompany Transfer.
	Department ID	Home company department that employee will be in.
	Pay Group	Pay group for own company to be responsible for compensation.
	Job Indicator	Primary.

Host Company Inputs (Completion of Hosting Temporary Intercompany Transfer)

Table	Fields	Input
JOB	Action	Retirement.
	Reason	Completion of Temporary Intercompany Transfer.
	Job Indicator	Secondary.

Scenario B3: Permanent Intercompany Transfer*Home Company Inputs (Permanent Intercompany Transfer – PICT)*

Table	Fields	Input
JOB	Action	Retirement.
	Reason	Permanent Intercompany Transfer.
	Job Indicator	Because the host company entered information using concurrent jobs functionality, it is <i>Secondary</i> .
JOB_JR	Intercompany Transfer Flag	Host company information.
	Business unit code	Business Unit that employee is transferring to.
	Company code	Host company that employee is transferring to.
	Department ID code	Host department that employee will be in.
	Sup Lvl ID code	Supervisor level that employee will have in host company.

Host Company Inputs (Hosting Permanent Intercompany Transfer - PICT)

Table	Fields	Input
JOB	Employee ID	If accessing through Concurrent Jobs or Job Data, use same Employee ID as home company. If accessing through Hire, assign new ID.
	Employee Record #	If accessing through Concurrent Jobs, Employee ID is 1 or higher.
	Action	Hire.
	Reason	Permanent Intercompany Transfer.
	Pay Group	Regular host company pay group that employee is to be in.
	Employee Class	Hosting intercompany Transfer.
	Job Indicator	Primary.
JOB_JR	Intercompany Transfer Flag	Home Company Information.
	Business Unit code	Business unit that employee comes from.
	Company code	Home company that employee belong to.
	Department ID code	Home department that employee was in.

Multiple Companies Using Single HRMS Database: Scenarios C1-6

This section discusses several scenarios for multiple companies using a single HRMS database.

Note. Concurrent Jobs is used for all scenarios in Set C.

Conditions:

- Both home and host companies use the same database and Business Unit, Company, Department ID, and Supervisor Level ID.
- Security settings allow all companies to access each other's information.

Scenario C1: Temporary Intercompany Transfer

Home Company Inputs (Temporary Intercompany Transfer - TICT)

Table	Fields	Input
JOB	Action	Transfer.
	Reason	Temporary Intercompany Transfer.
	Department ID	Dummy ID that indicates Temporary Intercompany Transfer.
	Pay Group	If home (own) company is responsible for compensation, no change to pay group. If not, enter dummy pay group to indicate that the host (other) company is responsible for compensation.
	Job Indicator	Because host company enters information using concurrent jobs functionality, it is <i>Secondary</i> .
JOB_JR	Intercompany Transfer Flag	Host Company Information.
	ICT Start Date	Actual start date of intercompany transfer (ICT).
	ICT End Date	Expected end date of ICT.

Host Company Inputs (Hosting Temporary Intercompany Transfer - TICT)

Table	Fields	Input
JOB	Employee ID	If accessing through Concurrent Jobs or Job Data, use same Employee ID as home company. If accessing through Hire, assign new ID.
	Employee Record #	If accessing through Concurrent Jobs, Employee ID is 1 or higher.
	Action	Hire.
	Reason	Temporary Intercompany Transfer.
	Company	Host company.
	Department ID	Host department that employee will be in.

Table	Fields	Input
	Pay Group	If host (own) company is responsible for compensation, pay group that you want this employee in. If not, enter dummy pay group to indicate that the home (other) company is responsible for compensation.
	Employee Class	Hosting Intercompany Transfer.
	Job Indicator	Primary.
JOB_JR	Intercompany Transfer Flag	Home Company Information.
	ICT Start Date	Actual start date of intercompany transfer (ICT).
	ICT End Date	Expected end date of ICT.

Scenario C2: Completion of Temporary Intercompany Transfer

See Scenario B2: Completion of Temporary Intercompany transfer.

Scenario C3: Permanent Intercompany Transfer

Home Company Inputs (Permanent Intercompany Transfer - PICT)

Table	Fields	Input
JOB	Action	Retirement.
	Reason	Permanent Intercompany Transfer.
	Job Indicator	Because host company entered information using concurrent jobs functionality, it is <i>Secondary</i> .
JOB_JR	Intercompany Transfer Flag	Host company information.

Host Company Inputs (Hosting Permanent Intercompany Transfer - PICT)

Table	Fields	Input
JOB	Employee ID	If accessing through Concurrent Jobs or Job Data, use same Employee ID as home company. If accessing through Hire, assign new ID.
	Employee Record #	If accessing through Concurrent Jobs, Employee ID is 1 or higher.
	Action	Hire.
	Reason	Permanent Intercompany Transfer.
	Pay Group	Regular host company pay group that employee is to be in.
	Employee Class	Hosting Intercompany Transfer.
	Job Indicator	Primary.
JOB_JR	Intercompany Transfer Flag	Home Company Information.

Working With Search Page Security

This section discusses how department security (Search Page Security on PERS_SRCH_GBL and EMPLMT_SRCH_GBL) works when you use the system's Multiple Jobs functionality.

Note. There are many different ways to set up this security and your specific business requirements will determine the way you set up yours. What we describe here is just one example of the way you may set up your security.

First, we make the following assumptions.

- You want to manage two companies in one database: Company A and Company B where Company B is a subsidiary of Company A.
- The entire organization of Company A belongs to Business Unit A (BUA) and the entire organization of Company B belongs to Business Unit B (BUB).
- You have defined two SetIDs: SIDA and SIDB for Companies A and B respectively.
- Neither company's employees have meaningful IDs (EmplIDs); that is, you can't tell from the ID which company an employee is in. For example, an employee with EmplID 1002 may belong to Company B, whereas employees with EmplIDs 1001 and 1003 belong to Company A.

- There are two Users: USR1 and USR2. USR1 has the right to access the Sales department of Company A and USR2 has the right to access the Sales department of Company B.

Following these assumptions, the next table represents the Job rows for employee 1001 who:

- Was originally hired by Company A.
- Went on an temporary intercompany transfer to Company B (Scenario B1).
- Returned to Company A (Scenario B3).
- Went on permanent intercompany transfer to Company B (Scenario B6).

Key: In the table Empl Rec# = Employment Record Number; Co. = Company; ICT = InterCompany Transfer; A/R = Action/Reason; D = Department; J = Job Indicator.

Event	Empl Rec#0	Empl Rec#1
1. Hired by Co. A	A/R – Hired Co. – A D – Sales J – Primary	N/A
2. Temp ICT to Co. B	A/R – Transfer/Temp ICT Co. – A D – Human Resources J – Secondary	A/R – Hire/Temp ICT Co. – B D – Sales J – Primary
3. Returned to Co. A	A/R – Transfer/Completion of Temp ICT Co. – A D – Sales J – Primary	A/R – Retirement/Completion of Temp ICT Co. – B D – Sales J – Secondary
4. Perm ICT to Co. B 4a. Retired from Co. A, 4b. Hired (or Rehired) by Co. B	A/R – Retirement / Perm ICT Co. – A A/R – Hired or Rehired / Perm ICT Co. – B D – Sales J – Primary	N/A

This is how Departmental security (Search Page Security) works for users who have security right access to a department. Users can:

- Access all employees one or more of whose current jobs belong to that department when PERS_SRCH_GBL is used as the search table, or
- Access the particular record numbers (Empl Rec#) for employees whose current job is in the department when EMPLMT_SRCH_GBL is used as the search table.

The next table shows which users have access to which data at each of the four events described for employee 1001:

Event	Personal Data	Empl Rec#0 Data	Empl Rec#1 Data
	PERS_SRCH_GBL	EMPLMT_SRCH_GBL	EMPLMT_SRCH_GBL
1. Hired by Co. A	USR1	USR1	N/A
2. Temp ICT to Co. B	USR1 and USR2	USR1	USR2
3. Returned to Co. A	USR1 and USR2	USR1	USR2
4a. Perm ICT to Co. B	USR1 and USR2	USR1	USR2
4b. Hired/Rehired by Co. B	USR2	USR2	USR2

Running the Intercompany Transfer Report

This section explains how to run the Completion of IC Transfer report.

Page Used to Run the Intercompany Transfer Report

Page Name	Object Name	Navigation	Usage
JPN Completion of IC Transfer	RUNCTL_PER065_JPN	Administer Workforce, Administer Workforce (GBL), Report Lcl, JPN Completion of IC Transfer	Run the JPN Completion of IC Transfer report (PER065JP) that lists employees on temporary intercompany transfer. The home company uses this report in order to confirm employees who are anticipated to return from temporary intercompany transfer.

CHAPTER 13

Updating Workforce Information

This chapter provides an overview of how to update workforce information and discusses how to:

- Use the Update components to change personal and job data.
- Locate personnel records.
- Change and delete employee IDs.
- Update personal data.
- Run personal data reports.
- Update job data.
- Run job data reports.
- Track U.S. federal government employee appraisals.
- Enter salary changes.
- View multiple job information.
- Refresh tables to facilitate accurate reporting.
- Run a database audit.

See Also

Chapter 6, “Hiring Your Workforce,” page 63

Understanding How to Update Workforce Information

A person’s history with your organization may involve many job changes, such as promotions, leaves of absence, layoffs, retirement, pay rate changes, and so on. To maintain a complete history of the person’s tenure, you’ll enter these changes regularly in PeopleSoft Human Resources.

This chapter discusses the basic procedures for entering a variety of changes to a human resources record. Depending on the personnel action you’re taking, you may have to enter more information than described here. For example, a promotion might include a new employee type, a change in benefit status, a pay rate change, and new standard hours and work period—all of which you’ll record on the various data pages.

Updating When You’ve Implemented PeopleSoft Payroll for North America

When you modify job data that affects employee payroll, the system marks payline records for recalculation where needed. When payroll is recalculated, the payroll system uses the new information.

Updating When You've Implemented PeopleSoft Benefits Administration

When you modify employee job or employment data that affects benefits, the system sets the flags controlling event maintenance to indicate that a change has occurred. Then, during the next event maintenance process, the system processes the event.

Using the Update Components to Change Personal and Job Data

To update workforce information, use the same pages you use to add employee records. However, the pages behave differently during the update process than they do when you add data for the first time. This means you *shouldn't* use the Hire Employee, Add Non Employee, or Add Concurrent Job components to update a person's personal data or job record. Instead, use one of the four update components on the Workforce Administration menu. We've configured these components to simplify updating a person's record in different business situations. The following table describes each group and its navigational path.

Component	Pages in the Group	Use this Component When...
Personal Data Workforce Administration, Personal Information, Biographical, Update Personal Information	Name History Address History Personal History Identity/Diversity	To update a person's personal information without changing job information.
Job Data Workforce Administration, Job Information, Job Data	Work Location Job Information Job Labor Payroll Salary Plan Compensation Job Earnings Distribution Benefit Program Participation Employment Information Employment Dates	To work with historical effective-dated rows of the employee's Job data. (Work with past, present, and future Job data.)

Component	Pages in the Group	Use this Component When...
Current Job Workforce Administration, Job Information, Current Job	Work Location Job Information Job Labor Payroll Salary Plan Compensation Job Earnings Distribution Benefit Program Participation Employment Information Employment Dates	Update only the employee's <i>current</i> job record. This improves processing time and system performance. You can add new current effective-dated rows to the job record, but you cannot see or add historical job records.
Pay Rate Change Workforce Administration, Job Information, Pay Rate Change	Employee Profile Salary Plan Compensation Job Earnings Distribution	Change the employee's compensation, without changing personal or job data.

Updating Job Data Without Using an Update Component

If you update JOB record data without using one of the update components, like when initially loading data or when using your own written processes, the calculated fields on the job record are not updated. To update the calculated fields, run the Application Engine process HR_PER501. You must run HR_PER501 from command line or out of PeopleSoft since no delivered process definition exists to run it.

If you update JOB record data using one of the update components or a component interface built on one of the update components, you do not need to run HR_PER501 because the update components run all PeopleCode that is run online (including updating calculated fields). Using the update components is the best way to update the job table because all business logic is run.

See Also

Chapter 6, "Hiring Your Workforce," page 63

Locating Personnel Records

The first time you open an update page, the system displays a search page for you to select the person on whose records you want to work. If you do not know the person's employee ID, use the page to search for the correct record by name, partial last name, alternate character name, department, setID, or employment status. If you prefer, use the Search By National ID page to find a person's record using a national ID.

Changing and Deleting Employee IDs

Employee IDs are the means by which you identify employees and nonemployees throughout PeopleSoft Human Resources. Maintaining a precise roster of IDs is critical to the accuracy of your employee data.

To help you keep accurate records, you can change or delete employee IDs. Though you'll rarely need to do this, you'll find it necessary in cases where you entered an employee ID in error or where you no longer need an ID.

The ID modification process changes the ID in every record where PeopleSoft Human Resources uses it, so keep in mind that modifications might affect other functions, such as payroll and benefits processing. Deleting an ID also deletes all security profiles associated with the ID; therefore, PeopleSoft recommends you delegate this responsibility to your system administrator.

This section discusses how to modify employee IDs.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Administering PeopleSoft Security”

Pages Used to Change or Delete Employee IDs

Page Name	Object Name	Navigation	Usage
ID Change	EMPLOYEE_ID_CHANGE	Set Up HRMS, System Administration, Database Processes, ID Change	Modify employee IDs.
ID Delete	EMPLOYEE_ID_DELETE	- Set Up HRMS, System Administration, Database Processes, ID Delete - Administer Workforce, Administer Workforce (USF), Process, ID Delete, ID Delete	Remove any IDs mistakenly entered into the system. Note. If you've already run payroll with this ID included, you must manually delete employee payroll records, such as tax and deduction records.

Modifying Employee IDs

Access the ID Change page.

ID Change

EmplID: KU0002 **New EmplID:** KU1002

Personnel Status: Employee **Original Hire Date:** 01/15/1982

Name: Baran, Charles [Display National ID](#)

Employee's Current Address

Country: USA United States

Address: 367 8th Street
Little Havana, FL 87274
US

ID Change page

You'll see display-only information on the employee to whom the system or you assigned the ID. Confirm that this is the correct person, and enter a New EmplID (new employee ID).

Updating Personal Data

Use the Personal Data component to update a person's name, address, phone numbers, marital status, education, and other personal information. See the Personal Data component for a complete discussion of the component and its data entry fields.

This section provides an overview of the types of personal data and discusses how to:

- Use workflow to update employee addresses.
- Update emergency contact information.
- Modify addresses.

See Also

Chapter 6, "Hiring Your Workforce," Hiring an Employee, page 67

Understanding Types of Personal Data

The Personal Data pages include two different types of personal data:

- Effective-dated data.

Name, address, marital status, and (for U.S. employees) whether a person is a smoker or nonsmoker are all effective-dated fields. Enter current, historical, or future information in these fields. When new information takes effect, the system stores the old data so that you can track the changes that occur over time. Effective-dated personal data is stored in the Personal Data History table (PERS_DATA_EFFDT). Name information is stored in the NAMES table with its own effective date. Address information is stored in the ADDRESSES table with its own effective date.

- Noneffective-dated data.

Some personal data fields aren't linked to an effective date. In these fields, new entries overwrite and delete the previous entries. This means you can store only current information. Noneffective-dated data is stored in the Personal Data table (PERSON).

To update effective-dated information on the Personal Data pages:

1. Insert a new data row in the Effective Date field on the Name History page or the Address History page. Each of these pages can use different EFFDTs. They are not tied together.
2. Enter the date when the new personal data that you're entering will take effect.
This date can be current or in the future.
3. Enter the new information on the appropriate Personal Data pages.
4. Save the pages.

Note. PeopleSoft Human Resources also includes a workflow process for updating employee addresses.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Using PeopleSoft HRMS," Understanding Effective Dates

Using Workflow to Update Employee Addresses

Keeping an employee's personal information current can be a full-time job in itself. With workflow, users who do not ordinarily have access to the PeopleSoft Human Resources system can update their address data, using an email program such as Lotus Notes, and send the information to your PeopleSoft Human Resources system.

Updating Emergency Contact Information

The system updates an employee's emergency contact information automatically if you specify that the contact information is the same as the employee's contact information. When the emergency contact information is different from the employee's contact information, you must maintain the emergency contact information manually on the Contact Address/Phone page.

To activate the automatic emergency contact address update:

1. Open the Contact Address/Phone page.
2. Select the Same Address as Employee and Same Phone as Employee check boxes *before* you update the employee address.
3. Select the type of address and type of phone number that is the same as the emergency contact.

When you update the employee's address, the system automatically updates the emergency contact address. It also updates the Dependent/Beneficiary pages in the Benefits menu and the Payroll Data pages in the Employee Payroll Data menu.

If the emergency contact address changes and is no longer the same as the employee's, clear the Same Address as Employee and the Same Phone as Employee check boxes. The system makes the address fields on the Contact Address/Phone page available, and you can enter a different address. After you clear the check box, the system no longer updates the emergency contact address automatically.

Even if the emergency contact address is the same as the employee, you can enter a different phone number.

4. Use the Other Phone Numbers page to record emergency contact phone numbers for the emergency contact in addition to the primary number recorded on the Contact Address/Phone page.

See Also

Chapter 8, "Entering Additional Data in Human Resources Records," Tracking Emergency Contacts, page 224

(USF) Modifying Addresses

To enter a new address for an employee:

1. Open Workforce Administration, Personal Information, Biographical, Update Personal Information, Name/Address.
2. Insert a new data row.
3. Enter a new effective date for the new address information.
4. Enter the employee's new address information.

Updating Emergency Contact Address Information

The system also updates the Dependent/Beneficiary pages in the Benefits menu and the Payroll Data pages in the Maintain Payroll Data (USF) menu.

Running Personal Data Reports

This section explains how to generate the following reports:

- Employee birthday report (PER002)
- Mailing labels (PER006)
- Employee Home Address Listing (PER020)
- Employee Listing (PER801SG)

Pages Used to Run Personal Data Reports

Page Name	Object Name	Navigation	Usage
Employees Birthday	RUNCTL_PER002	Workforce Administration, Personal Information, Biographical, Birthdays Report	Run the Employee Birthdays report (PER002). This report lists employees, their birthdays, and other identifying information. Note. Run the Refresh Employees Table process before running this report.
Employee Home Address Listing	PRCSRUNCNTL	Workforce Administration, Personal Information, Biographical, Home Address Report	Run the Employee Home Address Listing report (PER020), which contains a complete listing of all employees with addresses and home phone numbers.
Mailing Labels	PRCSRUNCNTL	Workforce Administration, Personal Information, Biographical, Mailing Labels Report	Run the Mailing Labels report (PER006), which produces a three-across set of mailing labels for all employees in your PeopleSoft Human Resources database. Note. Run the Refresh Employees Table process before running this report.
(SGP) Parameters	RUNCTL_EMP_LIST	Workforce Administration, Job Information, Reports, Employee Listing SGP	Run the Employee Listing report (PER801SG). This provides employee information based on the run control selections of Department, Employee Name, or Employee ID.

Updating Job Data

Use the Job Data component when you want to work with a person's historical job data. If you need to work with an employee's current job only, use the Current Job component and get faster system performance. You can work only with current and future job data on the Current Job pages. The following table shows the navigation for each component.

Component	Navigation
Job Data	Workforce Administration, Job Information, Job Data
Current Job	Workforce Administration, Job Information, Current Job

If you're using PeopleSoft Human Resources USF functionality, update job information using the pages discussed in "USF Processing Personnel Action Requests." If you're organizing all or part of PeopleSoft Human Resources by position, update most job-related data on the Position Data page.

This section discusses:

- Updating effective-dated job data.
- Entering multiple actions with the same effective date.
- (JPN) Appointment reporting for job data changes.
- Security considerations for updating job data.
- Personnel actions and employee status.
- Using workflow to maintain job data.
- Entering promotions.
- Entering departmental transfers.
- Tracking leaves of absence.
- Entering terminations and retirements.
- Using workflow to terminate employees.
- Entering deaths.
- Entering rehires.
- Assigning employees to different positions.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions, "Managing Position Data"

Chapter 16, "(USF) Processing Personnel Action Requests," page 391

Updating Effective-Dated Job Data

You usually update job data by inserting new effective-dated data rows into an existing employee record. Effective dates enable you to keep a complete chronological history of all your data and tables—whether you changed them two years ago or want them to go into effect two months into the future. With this information, you can "roll back" your system to a particular time to analyze position data or employee records. Or you can "roll forward" and set up tables and data before they take effect.

The system also uses effective dates to compare pages and tables to make sure that the prompt tables you see list only data that is valid as of the effective date of the page where you're working. For example, suppose you create a new department code with an effective date of May 1, 2004. If you enter a new data row (or update an existing row) on the Job Data pages that has an effective date *before* May 1, 2004, you won't see the new code as a valid choice when you select a department because the new code hasn't taken effect yet.

When you enter a new data row, the system copies the contents of the previous row into the new row—that way you do not have to retype any information that stays the same. (Ensure that you have the cursor on the data row you want to copy before you insert the new row.) The only new information you see is the effective date, which is set by default to the system date (usually today's date), which you can change.

To update effective-dated job data:

1. Open the Job Data - Work Location page for the employee whose record you want to change.
Always start in the Work Location page because that's where the Effective Date field is located. From there, you may have to go to other pages to enter more information about the personnel action that you're taking.
2. Insert a new data row.
3. In the Effective Date field, enter the date when the new action will take effect.
4. Select an action code for the change, such as *Transfer* or *Promotion*.
5. If applicable, enter a reason code to explain why this action is occurring.
6. Change any other data needed to complete the new action, either on this page or on other pages in the component.

For example, when you promote an employee, you most likely enter a new job code or perhaps a new position number on the Work Location page. You might also select a new salary administration plan/grade/step, enter a new compensation rate on the Compensation page, and enter a new business title and work phone on the Employment Information page.

7. Save the pages.

Entering Multiple Actions With the Same Effective Date

On occasion, you may need to enter more than one personnel action that takes effect on the same day. Entering two actions with the same effective date is especially common when you are tracking compound percentage pay increases that take effect at the same time. Use effective sequence numbers to combine multiple actions and specify which one to process first.

For example, a promotion (which produces a percentage pay increase) and a merit increase may take effect on the same day.

To enter multiple personnel actions with the same effective date:

1. Open the Job Data - Work Location Page for the person whose data you're updating.
2. Insert a new data row for the first personnel action.
The effective date is set by default to the system date, usually today's date, which you can override if necessary. Leave the effective sequence number set at 0.
3. Select an action code and, if appropriate, select a reason code from those you created in the Action Reason table.

4. Enter any other information you need to complete the action, either here or in other pages in the same component.
5. To enter the second action, return to the Work Location page and insert another data row.
6. Enter the same effective date as the first action, but enter an effective date sequence number of 1.
7. Select the appropriate personnel action and enter any other information required to implement the action, either here or in other pages.

Note. Use your mouse to move from the Effective Date field to the Effective Sequence field because the system views this field as a duplicate key and won't let you move any other way.

See Also

Chapter 16, “(USF) Processing Personnel Action Requests,” Multiple Actions With the Same Effective Date, page 397

(JPN) Appointment Reporting for Job Data Changes

When employees are newly hired or transferred, or have other job-related changes, many Japanese companies provide individual notifications of appointment to each employee. These notifications, known as Appointment Notifications (*Jirei*), contain different information depending on the action and action reason entered on the employee's new job record.

Periodically, also, many companies distribute a listing of all new hires or transfers or other changes of job. This is known as the Appointment List (*Tsuutatsu*).

The system provides a report page from which you can run the Appointment Notification report for individual employees. When you run the Appointment Notification report, the report headings change according to the actions for which you are running the report—you can select actions and action reasons on the report page.

The system also provides a report page from which you can run the Appointment List report for all employees.

Reporting Appointments for Actions and Report Outputs

The following table illustrates what the appointment reports will contain according to the action for which you run the report for (report column headings down, Job record Actions across):

Heading/Actions	Hire and Rehire	Transfer	Promotion	Retirement
Announcement Date	3	3	3	3
Company Desc. (of employee's company)	3	3		3
Department	3	3		3
Supervisor Level	3	3		3

Heading/Actions	Hire and Rehire	Transfer	Promotion	Retirement
Employee Status	3			
Salary Plan			3	
Salary Grade			3	

Note. For the actions *Transfer* and *Promotion*, the system automatically populates the Reason field—for Promotion, with *Grade Advance* and for Transfer with *Employee Request* and *Internal Recruitment*. For all other actions shown in the table, you can select individual reasons (for the action you selected) or have the system select all reasons (for the action you selected).

Under the Japanese appointment reporting functionality, if you are recording an employee's simultaneous change of department and supervisor level, enter the department change first. With both changes having the same effective date, the change of supervisor level will have the higher sequence number and ensure that the system selects the changes for reporting on both the Appointment Notification and Appointment List.

In addition, when you record Job Data changes under the Japanese appointment reporting functionality, reports are available for the following actions:

- Hire
- Rehire
- Retirement
- Transfer
- Promotion

Sorting Appointment Lists Using Tree Structures and Definitions

To have the system sort your appointment lists by department and supervisor level, use the standard tree building features to create a tree structure and reporting definition for your supervisor levels and a reporting definition for your departments. You then need to select only the Refer to the Tree Manager check box on the report page to have the system use your DEPT_SECURITY tree and, depending on the Job action and reason to which the appointment information relates, your SUPERVISOR_LEVEL tree.

See Also

Chapter 13, "Updating Workforce Information," Entering Multiple Actions With the Same Effective Date, page 328

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "PeopleSoft Application Fundamentals for HRMS Reports"

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Administering PeopleSoft Security"

Security Considerations for Updating Job Data

When you update a job record, keep in mind two special security issues.

Security and Effective Date Sequence Numbers

When you transfer employees from one department to another using a data row that contains an effective-date sequence number, the system currently allows users with security access to the old or new department to have access to all the employee data. PeopleSoft delivers the system this way because implementing security in system views specific to the function Max (effseq) on PS_JOB would slow down online response time.

For example, when you transfer an employee from Department 1 to Department 2 and give the employee a promotion on the same day, users with access to either Department 1 or 2 have access to the employee data because the transfer data row contains an effective-date sequence number.

You can prevent this by changing the security views for the PeopleSoft applications you use. Keep in mind, however, that making the change affects system performance.

Security for Transfers Between Departments

PeopleSoft Human Resources enables users to assign employees into departments they cannot access for updates. If you want to prevent a user from transferring an employee into a department for which they do not have access, use the PeopleSoft Human Resources DEPT_TBL_ACCESS view, which shows only those department IDs that a user can access based on the security permission lists to which they belong.

Note. If you choose to use this view, you must create a permission list for users who have access to all departments so that they can perform transfers.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Administering PeopleSoft Security”

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Understanding PeopleSoft HRMS System Data Regulation”

Personnel Actions and Employee Status

When you select a personnel action to change a person’s job data, the system may change the person’s employee status. For example, when you select *Retirement*, the system changes the employee status from *Active* to *Retired*. Similarly, if you terminate an employee contract due to death, the system changes the employee status from *Active* to *Deceased*. The employee status is based on either the personnel action or, in a few cases, the *reason* for the action, such as death. A change in employee status can affect PeopleSoft Human Resources Manage Base Benefits, PeopleSoft Benefits Administration, PeopleSoft Payroll processing, and PeopleSoft Pension Administration. For example, a promotion or a job reclassification might affect an employee’s benefit coverage, or you might need to suspend benefit coverage during a leave of absence or a suspension.

Here’s how the system sets the employee status:

When you Select the Personnel Action	The System Sets the Employee Status to	And Triggers Payroll Processing for PeopleSoft Payroll for North America and the Payroll Interface
Hire Rehire Return from Leave Return from Disability Additional Job Recall from Suspension/Layoff Assignment	<i>Active</i>	Yes
Leave of Absence Short-term Disability Long-term Disability	<i>Leave of Absence</i>	No
Paid Leave of Absence Short-term Disability with Pay Long-term Disability with Pay	<i>Leave with Pay</i>	Yes
Retirement with Pay	<i>Retired with Pay</i>	Yes
Terminated with Benefits Terminated with Pay	<i>Terminated with Pay</i>	Yes
Layoff Suspension	<i>Suspended</i>	No
Retirement	<i>Retired</i>	No
Assignment Completion Termination	<i>Terminated</i>	No

When you Select the Personnel Action	The System Sets the Employee Status to	And Triggers Payroll Processing for PeopleSoft Payroll for North America and the Payroll Interface
Termination (reason of Death)	<i>Deceased</i>	No
Pay Rate Change Demotion Data Change Earnings Distribution Change Job Reclassification Position Change Probation Completion of Probation Promotion Transfer	The same status that's in the previous data row. If no previous data row exists, the system sets the status to <i>Active</i> .	Varies

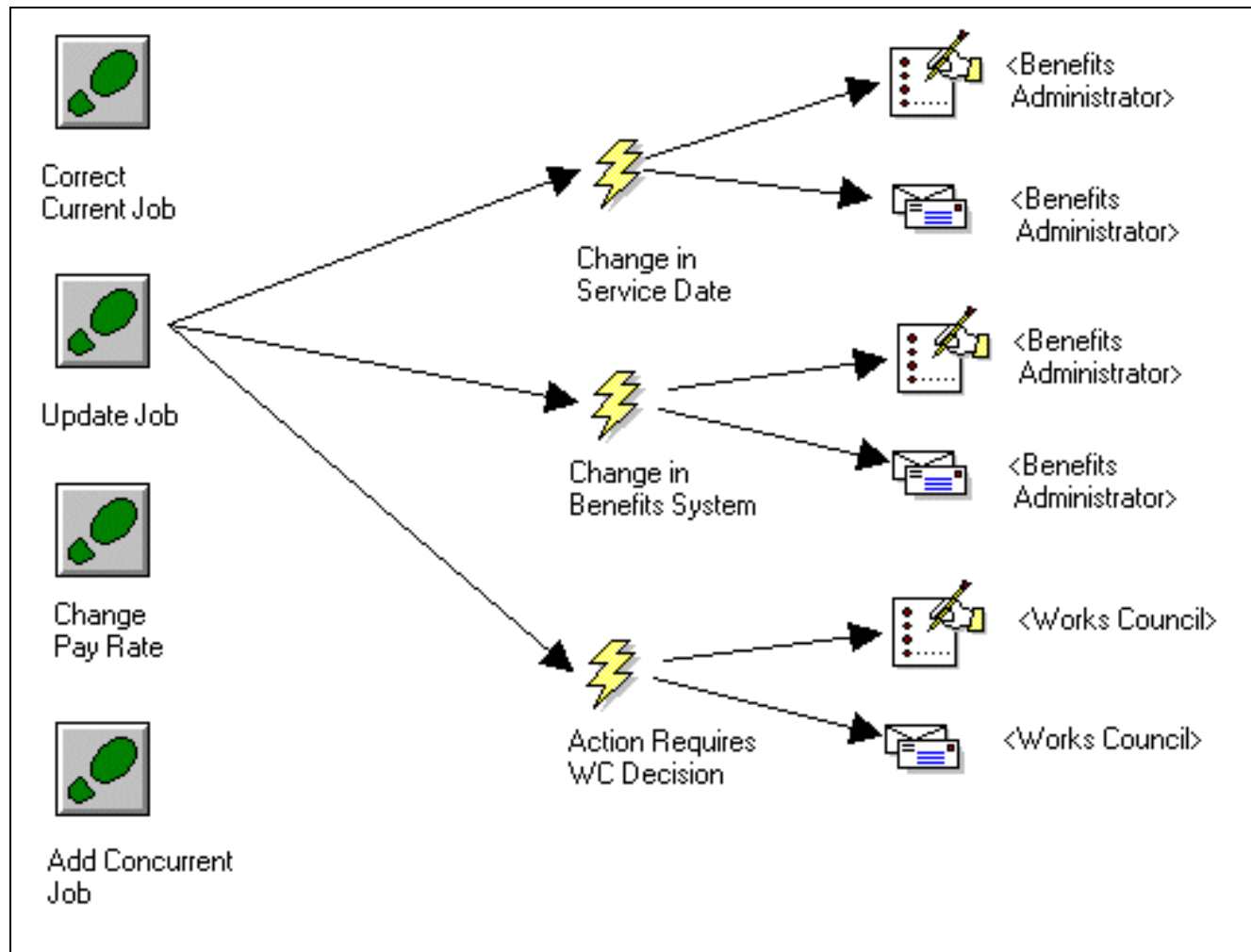
Note. If your organization uses PeopleSoft Payroll for North America, the system does not generate payroll paysheets for employees whose status is *Retired* or *Terminated*. If you need to pay employees for a partial pay period or for a time after they leave the company, select the personnel action *Retired with Pay* or *Terminated with Pay*.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “Maintaining Payroll Data”

Using Workflow to Maintain Job Data

The Maintain Job Data workflow automates the processes you use to update employee service dates and to change employee benefits programs. If you have a German workforce, this workflow also initiates the review of personnel actions by the Works Council for jobs requiring Works Council approval.



Maintain Job Data workflow

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Using PeopleSoft Workflow,” Workflow Business Processes in PeopleSoft Human Resources

Entering Promotions

A promotion usually involves a change of salary grade and new job code. The following table shows the pages and fields you typically update when you enter a promotion. You may need to update additional pages and fields.

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action Code: <i>Promotion</i> Reason Code (if applicable) Position Number	All the entries on the page could change when you enter a promotion, depending on the data for the former job and the new job. If you're organizing part or all of PeopleSoft Human Resources by position, review <i>PeopleSoft Human Resources PeopleBook: Manage Positions</i>
Job Information	Job Code Regular/Temporary Full/Part Standard Hours Work Period FTE Shift Shift Rate Contract Number Local country fields	All the entries on the page could change when you enter a promotion, depending on the data for the former job and the new job. If you're organizing part or all of PeopleSoft Human Resources by position, review <i>PeopleSoft Human Resources PeopleBook: Manage Positions</i>
Compensation	Salary Administration Plan/Grade/Step Compensation Rate	Update Salary Plan/Grade/Step on the Salary Plan page. Also update compensation information on the Compensation page.
Employment Information	Business Title Work Phone	Update these fields as needed.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Compensation, “Refreshing Employee Compensation Information,” Changing a Compensation Package

Entering Departmental Transfers

Enter a transfer action when you want to assign a person to a new department without changing the person's job code. A transfer also implies that the employee's salary grade and compensation remain the same.

If you're organizing part or all of PeopleSoft Human Resources by position, use the transfer action to move an employee from one position to another. To move the position *and* the incumbent to a new location or department, use the Position Data pages.

The following table shows the pages and fields you typically update when you enter a transfer. You may need to update additional pages and fields.

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action Code: <i>Transfer</i> Reason Code (if applicable) Department	The system automatically enters a new location if it finds matching location setIDs in the Department table and the Tableset Record Group Control for the business unit you're using.
Employment Information	Business Title Work Phone	Update these fields as needed.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions, “Managing Position Data”

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Understanding PeopleSoft HRMS System Data Regulation”

Tracking Leaves of Absence

Many employees take a leave of absence at some point in their careers. Leaves can occur for any number of reasons, including sickness, vacation, maternity or paternity leave, jury duty, suspensions, or unpaid leave.

If your company tracks employees' absence history, you can acknowledge a leave of absence in the Monitoring Absences pages and Job Data pages.

The following table shows the pages and fields you typically change when you enter a leave of absence. You may need to update additional pages and fields, as well.

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action: <i>LOA (leave of absence)</i> or <i>Paid LOA (leave with pay)</i> Reason Code (if applicable)	
Employment Information	Expected Return Date	Enter the date you expect the employee to start work again. When you save the pages, the system displays the day before the leave of absence date as the date last worked. You can change it if necessary. When the employee returns from leave, the system clears this field.

Tracking Multiple Types of Leave for One Employee

You might encounter situations where you need to enter multiple types of leave for the same employee. For example, an employee might take a six-week leave with disability pay, take the following two weeks with vacation pay, and then take an additional month without pay.

You can enter all these leave types at the same time by inserting a new data row in the Work Location page for each type of leave and entering the effective date when each leave type begins. Then move to the appropriate page to make any other changes pertaining to that particular leave, such as compensation changes.

Entering Returns from Leave

Most employees eventually come back from leaves of absence and resume their job duties. In fact, you often know at the time employees begin their leaves when they plan to return to work. Enter the return from leave information at the same time you enter the leave of absence, or as soon as you have a confirmed return date.

The following table shows the pages and fields you typically change when you enter a return from leave. You may need to update additional pages and fields, as well.

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action: <i>Return from Leave</i> Reason Code (if applicable)	
Employment Information	Expected Return Date	When you save the pages, the system clears this field.

Entering Terminations and Retirements

When an employee retires or leaves your organization for some other reason, you enter the termination into the person's record.

The following table shows the pages and fields you typically change when you enter a termination or retirement. You may need to update additional pages and fields, as well.

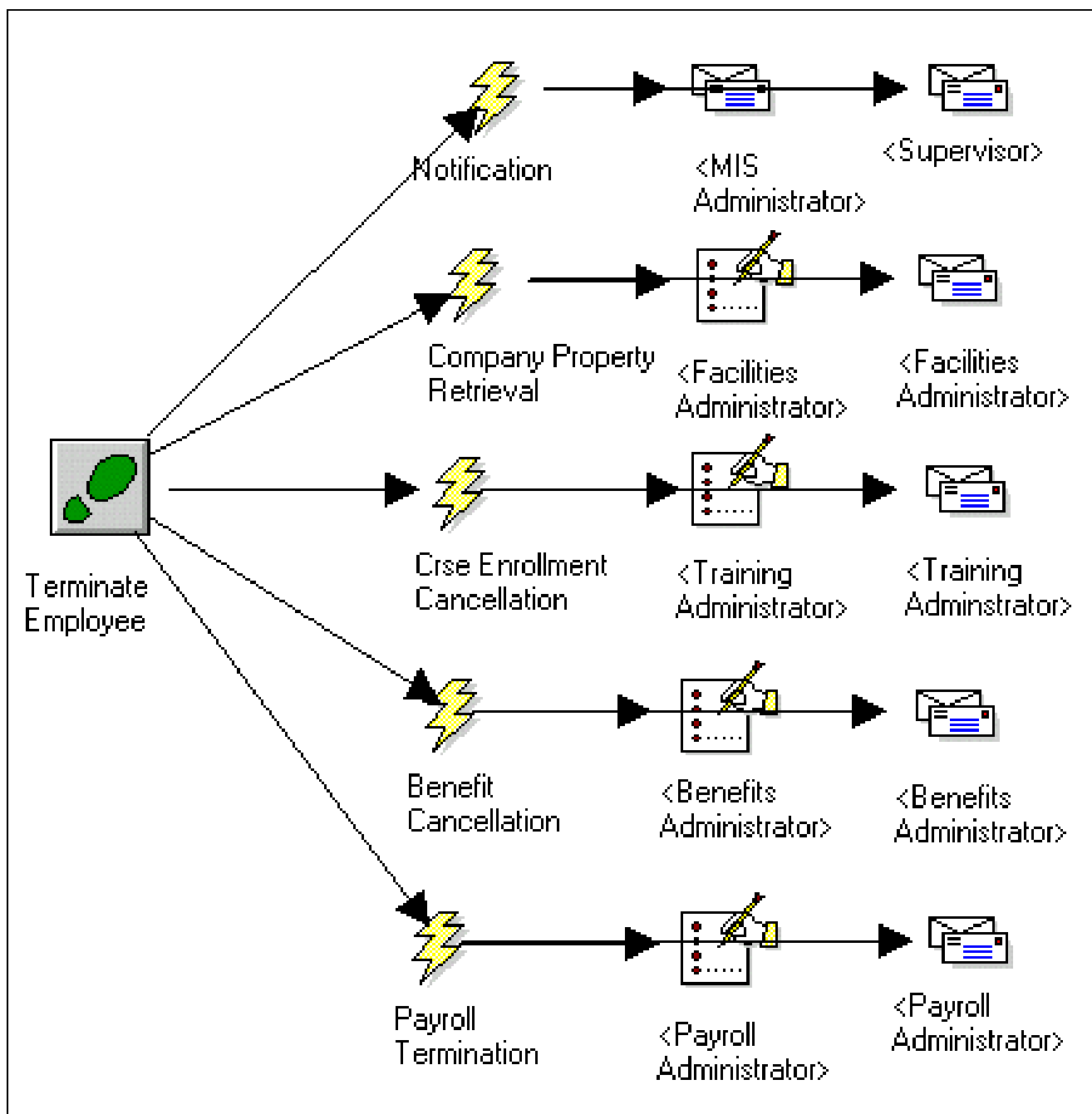
Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action: <i>Terminated, Terminated with Pay, Terminated with Benefits, Retirement, or Retirement with Pay</i> Reason Code, if applicable	The system treats the effective date you enter as the day the termination starts and the first day the employee is no longer paid. For example, if the employee's last day of employment is June 1, set the effective date of termination or retirement as June 2 because that's when the termination begins. If you set it as June 1, the employee wouldn't be paid for the last day of work.
Employment Information	Termination Date	The system displays the day <i>before</i> the effective date as the termination date and last date worked. If you rehire the employee, the system clears both these fields. When an employee returns from leave, the system clears only the Date Last Worked field.

Using Workflow to Terminate Employees

The Terminate Employee workflow streamlines the termination process and ensures that you process individuals leaving your organization according to your company's business processes.

When a user terminates an employee contract on the Job pages, the Terminate Employee workflow generates worklists and emails, routing them to different function administrators to notify them of the termination to be processed. For example, if an employee was enrolled in or awaiting a course, then the system sends an email and a worklist to the training administrator. The email carries important information such as the employee ID and the date of termination. The worklist pulls the administrator directly into the page to process the employee.

The following business process map illustrates the Terminate Employee workflow.



Terminate Employee workflow

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Using PeopleSoft Workflow," Using Workflow to Terminate Employees

Entering Deaths

The following table shows the pages and fields you typically change when you enter a termination due to death.

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action: <i>Terminated</i> Reason Code: <i>Death</i>	The system treats the effective date you enter as the day the termination starts and the first day the employee is no longer paid. For example, if the employee's last day of employment is June 1, set the effective date of termination or retirement as June 2 because that's when the termination begins. If you set it as June 1, the employee won't be paid for the last day of work.
Identity/Diversity	Date of Death	Record the date the employee died.
Employment Information		The system displays the termination effective date as the termination date and the day before the termination date as the date last worked. The system uses these dates, and the effective date, in payroll processing and reporting.

Entering Rehires

You may want to rehire an employee who worked for your company in the past. Information on a rehired employee is probably already in PeopleSoft Human Resources, unless the employee data was deleted or archived. Before you rehire employees, you may want to make sure their personal, employment, and job data is current. If a rehired employee doesn't have a record in the system, do not use the update pages. Instead, follow the new hire process described in "Hiring Your Workforce."

Because you probably rehire an employee whose previous job was in a department (organizational entity) for which you do not have security access, it's helpful to provide security access to all departments to at least one user performing rehires.

The following table shows the pages and fields you typically change when you enter a rehire. You may need to update additional pages and fields.

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action: <i>Rehire</i> Reason Code, if applicable	You can rehire only employees whose employee status is <i>Terminated</i> , <i>Terminated with Pay</i> , <i>Retired</i> , or <i>Retired with Pay</i> .
Employment Information	Company Seniority Date Service Date Rehire Date Service Months Service Days	You may want to change the company seniority date and service date. The company seniority date can serve as the basis for the employee's seniority, or you can use it for other tracking and reporting purposes. The service date is the date on which the employee's service ranking is based and is used primarily for benefit-related matters. When you save the pages, the system automatically completes the rehire date and recalculates the service months and days.

See Also

Chapter 6, "Hiring Your Workforce," page 63

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Administering PeopleSoft Security"

Assigning Employees to Different Positions

If you're organizing part or all of PeopleSoft Human Resources by position, you often move employees from one position to another as a result of promotions, transfers, rehires, or other personnel actions. Because both position and employee data are already in the system, you connect the two by selecting a position number, entering the effective date of the assignment, and entering any exceptions to the default data.

The following table shows the pages and fields you typically change in the Job Data component when you enter a change of position. You may need to update additional pages and fields. When you change an employee assignment, the system also updates the Position Data - Work Location page: It automatically calculates and displays the new head count and shows the appropriate indicator in the Open/Filled field.

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action: <i>Position Change, Transfer, Promotion, or Rehire</i> Reason Code, if applicable Position Number	After you enter a position number, the system automatically completes position-related fields, including job code, department, and location. The system enters the position entry date as the effective date of the position change action. You cannot change the position entry date. To change the entry date, you must change the effective date for the position change action. To override the position defaults, select the Position Data Override check box, which makes the previously unavailable fields available for entry, such as Job Code and Department. You can then enter exceptions in these fields. The Position Management Record check box is unavailable for entry. The system uses this check box to indicate that it has automatically inserted a data row on the Job Data pages due to changes you've made to fields on the Position Data pages that overlap with fields here. Note. If you override the defaults, you must maintain the employee data manually—the system won't update position data automatically again until you clear the Position Data Override check box. The system issues a warning message if you assign an employee to a position that has already been filled by another employee and if a new employee appointment exceeds the maximum head count for that position.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions, “Managing Position Data”

Running Job Data Reports

The following reports relate to employees' job data and changes to job data:

- Personnel Actions History (PER015)

Note. U.S. Federal Government installations have a different Personnel Actions History report (FGHR017) to track job actions.

- Pending Future Actions (PER021)
- Department Action Notices (PER001)
- Employees on Leave of Absence (PER005)
- Temporary Employees (PER007)
- Years of Service (PER003).
- Primary Job Audit (PER058)
- Employee Turnover Analysis (PER010)
- ESP Official List (PER054ES)
- JPN Appointment Notification (PER063JP)
- JPN Appointment List (PER064JP)
- JPN Employee Assignment List (PER066JP)

This section discusses how to:

- Run the Appointment Notification report.
- Run the Appointment List report.
- Run the Employee Assignment List report.

See Also

[Chapter 15, “\(USF\) Administering Personnel Action Requests,” page 371](#)

Common Elements Used in This Section

Show Components? Select if you want your report to display compensation component information.

Pages Used to Run the Job Data Reports

Page Name	Object Name	Navigation	Usage
Personnel Actions History	RUNCTL_PER015	Workforce Administration, Job Information, Reports, Personnel Actions History	Run the Personnel Actions History report (PER015) that lists all employees affected by each of the job actions you enter.
Pending Future Actions	RUNCTL_ASOFDT_COMP	Workforce Administration, Workforce Reports, Pending Future Actions	Run the Pending Future Actions report (PER021) that lists all employees with job action notices scheduled for a future date.

Page Name	Object Name	Navigation	Usage
Department Action Notices	PRCSRUNCNTL	Workforce Administration, Workforce Reports, Department Action Notices	Run the Department Action Notices report (PER001). This report lists action notices that are tied to a time period or expiration date. Use it as a reminder of selected personnel action notices. Note. Run the Refresh Employees Table process before running this report.
Employees on Leaves of Absence	PRCSRUNCNTL	Workforce Administration, Job Information, Reports, Employees on Leave of Absence	Run the Employees on Leave of Absence report (PER005). This report lists all employees on leave and their expected return dates. Use this report to compare the return date you've already entered in PeopleSoft Human Resources with the employee's expected return date or as a reminder for you to enter the return from leave information in the system. Note. Run the Refresh Employees Table process before running this report.
Temporary Employees	RUNCTL_ASOFDATA	Workforce Administration, Job Information, Reports, Temporary Employees	Run the Temporary Employees report (PER007). This provides an alphabetical list of all employees marked as temporary, along with length of service and other details of employment.
Years of Service	RUNCTL_PER003	Workforce Administration, Job Information, Reports, Years of Service	Run the Years of Service report (PER003). This report lists employees who have completed the number of years of service you specify, as of the point in time you specify. Use this report as a reminder of employees who are eligible for vested benefits plans or service recognition awards.

Page Name	Object Name	Navigation	Usage
Primary Job Audit	RUNCTL_PER058	Workforce Administration, Workforce Reports, Primary Job Audit	Run the Primary Job Audit report (PER058). Use this report to check for discrepancies in the primary job designation for employees and nonemployees with multiple jobs. We recommend checking regularly to correct discrepancies in your employee job records.
Employee Turnover Analysis	RUNCTL_FROMTHRU	Workforce Administration, Workforce Reports, Employee Turnover Analysis	Run the Employee Turnover Analysis report (PER010). This time-slice report lists each department ID and provides the employee counts as of the date you specify.
Official List	RUNCTL_PER054_ESP	Workforce Administration, Workforce Reports, Official List ESP	Run the Spanish Official List report (PER054ES) which compiles the information you need for Matricula book reporting. You can run the report for All matricula books, which includes historical employee data, or for the Current book only, which includes only current data.
Appointment Notification JPN	RUNCTL_NTF_JPN	Workforce Administration, Job Information, Reports, Appointment Notification JPN	Runs the JPN Appointment Notifications report (PER063JP). Depending on the Action/Reason combination you use in the run control, this report prints individual employee notifications of hire, rehire, retirement, transfer, and promotion.
JPN Appointment List	RUNCTL_NTF2_JPN	Workforce Administration, Job Information, Reports, Appointment List JPN	Runs the Appointment List JPN report (PER064JP) that generates an appointment list. This report lists all employees who have been hired, rehired or retired, transferred or promoted. The information the report provides varies according to the Action/Reason combination you enter on the Appointment List report page.

Page Name	Object Name	Navigation	Usage
JPN Employee Assignment List	RUNCTL_EMPLIST_JPN	Workforce Administration, Job Information, Reports, Employee Assignment List JPN	Print the JPN Employee Assignment List report (PER066JP), which lists employees by department, including Additional Appointment employees.

(JPN) Running the Appointment Notification Report

Access the Appointment Notification JPN page.

Appointment Notification JPN

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English

Report Parameters

As Of Date: 08/05/2002

Company: AG Department of Agriculture

Notification Statements: Hiring order is as follows

Publish Date: Published by: Department of Agriculture

Representative Title: Representative Name:

Action: HIR Hire

[Use All Action Reasons](#)

*Reason Code	Description		
1 FIX	MX-Hire	+	-
2 HAF	Hired from Affiliate	+	-

Customize | Find | View All | First | 1-2 of 2 | Last

Appointment Notification JPN page

Report headings vary according to the Action/Reason combination. Enter free-form text and a company official's title and name to appear on the report, and select the action and reason combinations on which you want to report.

Language

Select the language you want the report to be in.

As of Date

This is the effective date of employees' job data rows that the system will search and report on. It appears on the report as the Announcement Date.

Note. For Retirement notifications, you should enter the effective date of the retirement row on the employee's Job record. The system will set the Announcement Date on the printed notification as the As of Date minus 1 day, the same as the Termination Date on the employee's Employment Dates page.

Company	Select your company code. The company description defaults into the Published by field.
Notification Statements	This free-form text field is for comments you want to appear as an introduction to the list on the report: for example “Hiring order is as follows.”
Publish Date	This date, which appears on the report, is the date your organization wants as the official publication date of the Appointment Notification.
Published by	This will initially display the description of the company you entered, but you can override the default with a free-form description of, for example, your HR department if that’s what you want to appear on the notification.
Representative Title	This also defaults from the company table. You can overwrite the default. This is the title of the company’s representative that will appear on the notification.
Representative Name	This also defaults from the company table. You can overwrite the default. This is the name of the company’s representative that will appear on the notification.
Action	Select an action that you want to report on. The drop-down list box will contain all actions in the system, but you can only select the following: <i>Hire, Rehire, Transfer, Promotion, Retirement</i>
Use All Action Reasons	Click this button unless you want to select individual reasons for the action you entered in the Reason Code grid. Even if you have selected individual reasons in the grid, if you click this button, you will get all reasons, so you don’t have to clear the grid if you change your mind. Note. You only need to select reasons (individual or “Use All Action Reasons”) for actions <i>Hire, Rehire</i> and <i>Retirement</i> . For actions <i>Transfer</i> and <i>Promotion</i> , the system automatically populates the Reason Code field. However, the process reports only Job rows that do have a Reason Code. If a Job row has Action = <i>Hire, Rehire, Retirement, Transfer</i> , or <i>Promotion</i> but no Action Reason, it is not reported.
Reason Code	Select all the reasons for the action you entered that you want the report to include. If the Use All Action Reasons check box is clear, you must enter at least one reason in this field. The system displays the description of each reason you select. See the Note above that discusses the Use All Action Reasons field.

(JPN) Running the Appointment List Report

Access the Appointment List JPN page.

Appointment List JPN

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English

Report Parameters

As Of Date: 08/05/2002

Company: FJ Chemical Safety and Hazard Inv

Publish Date: 08/02/2002 Published by: Human Resources

☒ Refer to the Tree Manager

Action: HIR Hire

[Use All Action Reasons](#)

*Reason Code	Description		
1 FIX	MX-Hire	+	-
2 FST	First Job	+	-

Appointment List JPN page

You can enter free-form text and a company official's title and name to appear on the report, and you can select the action and reason combinations you want to report on.

As Of Date

This is the effective date of employees' job data rows that the system will search and report on.

Note. For *Retirement* listings, you should enter the effective date of the Job retirement row. The system will set the Announcement Date on the printed list as the As Of Date minus 1 day, the same as the Termination Date on the employee's Employment Dates page.

Company

Select your company code. Unlike for Appointment Notification, the company description will *not* default into the Published by field.

Publish Date

This date, which appears on the report, is the date your organization wants as the official publication date of the Appointment List.

Published by

Enter a free-form description of the publishing department such as your Human Resources department.

Action

Select an action that you want to report on. The drop-down list box will contain all actions in the system, but you can only select the following:

Hire, Rehire, Transfer, Promotion, Retirement

Refer to the Tree Manager

Select this check box if you want the system to sort the listing using your DEPT_SECURITY tree and, depending on the Action/Reasons, your SUPERVISOR_LEVEL tree.

This is how the system sorts your listing when you select this check box:

- For Actions *Hire* and *Rehire*, the system uses only the DEPT_SECURITY tree.
- For Actions *Transfer* and *Retirement*, the system uses both the DEPT_SECURITY tree and the SUPERVISOR_LEVEL tree.
- For Action *Promotion*, the system sorts by Salary Plan, Salary Grade, and Employee ID whether the check box is selected or clear. Trees have no effect.

If Refer to the Tree Manager is clear, the system sorts the list by Employee ID.

Note. Employees who do not have a supervisor level appear in the list by Department, with the Supervisor Level column blank. They are sorted by Employee ID, after all the employees who do have a supervisor level.

Use All Action Reasons

Click this button unless you want to select individual reasons for the action you entered in the Reason Code grid. Even if you have selected individual reasons in the grid, if you click this button, you will get all reasons, so you don't have to clear the grid if you change your mind.

Note. You need to select reasons only for actions *Hire*, *Rehire*, and *Retirement*. For actions *Transfer* and *Promotion*, the system automatically populates the Reason Code field. However, the process reports only Job rows that do have an Action Reason. If a Job row has Action = *Transfer* or *Promotion* but no Action Reason it will not be reported.

Reason Code

Select all the reasons for the action you entered that you want the report to include. If you select the Use All Action Reasons button, you must enter at least one reason in this field. The system displays the description of each reason you select. See the Note above for the Use All Action Reasons field.

(JPN) Running the Employee Assignment List Report

Access the JPN Employee Assignment List run control page.

Run Control ID:	1	Report Manager	Process Monitor	Run
Language:	English			
As Of Date:	08/05/2002			
SetID:	JPN01	Setid for JPN01 BU		
Tree Name:	DEPT_SECURITY	Japan Security Tree		
Tree Node:	10200	Corporate HQ		

JPN Employee Assignment List run control page

This report lists employees by department and supervisor level including employees with additional appointments.

To run the report, at least one Department tree must be created. For the purposes of department security, the DEPT_SECURITY tree usually already exists. You can either select this tree or create a new department hierarchy beneath the DEPARTMENT tree structure.

The report is sorted by Department then:

- Employees with supervisor levels registered in the Supervisor Level tree, in tree order.
- Employees with supervisor levels not registered in the Supervisor Level tree, in alphanumeric supervisor level order.
- Employees without supervisor levels, in alphanumeric employee ID order.

Note. The Supervisor Level tree that the system uses for sorting is the one used for the Appointment Notification and Appointment List reports. It must be named SUPERVISOR_LEVEL if the system is to use it. If you have not defined a Supervisor Level tree with that name, sorting will be in alphanumeric supervisor level order.

Entering Salary Changes

One of the most common ways to update job data is by changing an employee's salary. Change an employee pay rate in either the Pay Rate Change component or the Job Data pages. The information you update is the same in either component, but the Pay Rate Change component is particularly useful if you want only to change the salary amount (not a promotion or transfer), because this is a smaller component and are quicker to use. The three pages in the Pay Rate Change component—Employee Profile, Salary Plan and Compensation—match related pages in the Job Data component (the Employee Profile page contains information from both the Work Location page and the Job Information page). For information about the fields on the Pay Rate Change pages, refer to the Job Data component in “Hiring Your Workforce.”

This section discusses how to:

- Use the Pay Rate Change pages.
- Use the Job Data component.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Plan Salaries, “Administering Salary Plans, Grades, and Steps”

Chapter 6, “Hiring Your Workforce,” page 63

Using the Pay Rate Change Pages

The Pay Rate Change component provides a quick and simple option for making salary adjustments when the adjustment is not related to any other changes such as promotions or transfers. If any other job-related information needs to be modified for the salary change, use the Job Data component.

Page	Comments
Employee Profile	Adjust the work periods and hours if necessary for the pay rate change being entered.
Salary Plan	Adjust the salary step.
Compensation	Adjust rates and frequencies.

Using the Job Data Component

The following table shows the pages and fields you typically change when you enter a promotion. You may need to update additional pages and fields, as well.

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action Code: <i>Pay Rt Chg</i> (pay rate change) Reason Code (if applicable)	Enter <i>Pay Rate Change</i> to enter a salary change for an employee that isn't related to a change in salary grade or job code. If the pay rate change results from a salary grade or job code change, enter the change as a promotion or some other action.

Affected Pages	Affected Fields	Comments
Salary Plan	Salary Administration Plan/Grade/Step	Enter a new salary step if the pay rate change involves a change in step. You cannot select a new grade because, if the pay rate resulted from a change in salary grade, you would enter the rate change as part of a promotion or other action. If you've selected the Multi-Step/Grade check box on the Installation Table page and you enter a new step on this page, you must click the 'Default Pay Components' button in the Compensation page to default into the pay components for that step—unless you have distributed the employee's earnings by amount on the Job Earnings Distribution page. For job earnings distributions, manually update the distribution for the new rate.

Affected Pages	Affected Fields	Comments
Compensation	All fields	To enter a new pay rate, enter a new compensation rate, rate change amount, or rate change percent. When you enter any one of these three amounts, the system automatically calculates the other two. Based on the compensation rate and frequency, the system calculates and displays the hourly rate, daily rate, monthly rate, and annual rate for this employee. If you've selected the Multi-currency check box on the Installation Table page and entered the compensation rate in a different currency from your base currency, the system converts the rates to the base currency and compares them with the ranges specified for this salary grade in the Salary Grade table. If the rates exceed the salary range, a warning message appears. If necessary, enter a new annual benefits base rate for calculating this employee's benefits. The system calculates the Compa-Ratio (or percent through range calculation) based on the salary plan and grade and in the base currency your organization uses, which you specify on the Installation Table page. The system also calculates the percent through range. This figure determines where an employee falls in the range by taking the salary minus the minimum divided by the spread. For example, if an employee has a salary of \$26,000 in a range of \$25-30,000 for the salary grade, the percent through range would be 20 percent. Also modify any other information that has changed because of the pay rate change, such as holiday schedule, pay group, employee type, standard hours, or work period in Job Data, Payroll or Job Information.

Affected Pages	Affected Fields	Comments
Job Earnings Distribution		Update as needed to distribute the employee's compensation hours or earnings.
Employment Information	Date Last Increase	When you change an employee's salary, the system updates these fields. Exceptions are cost-of-living and other across-the-board increases.

Viewing Multiple Job Information

This section discusses how to view a summary of all jobs.

Page Used When Updating Information for Multiple Jobs

Page Name	Object Name	Navigation	Usage
Multiple Jobs	MULTIPLE_JOBS	Workforce Administration, Job Information, Review Job Information, Multiple Jobs Summary	View a summary of all jobs and changes in employment status for employees that have multiple jobs.

Viewing a Summary of All Jobs

Access the Multiple Jobs page.

Before using this page, select Multiple Jobs Allowed on the PeopleTools Options menu.

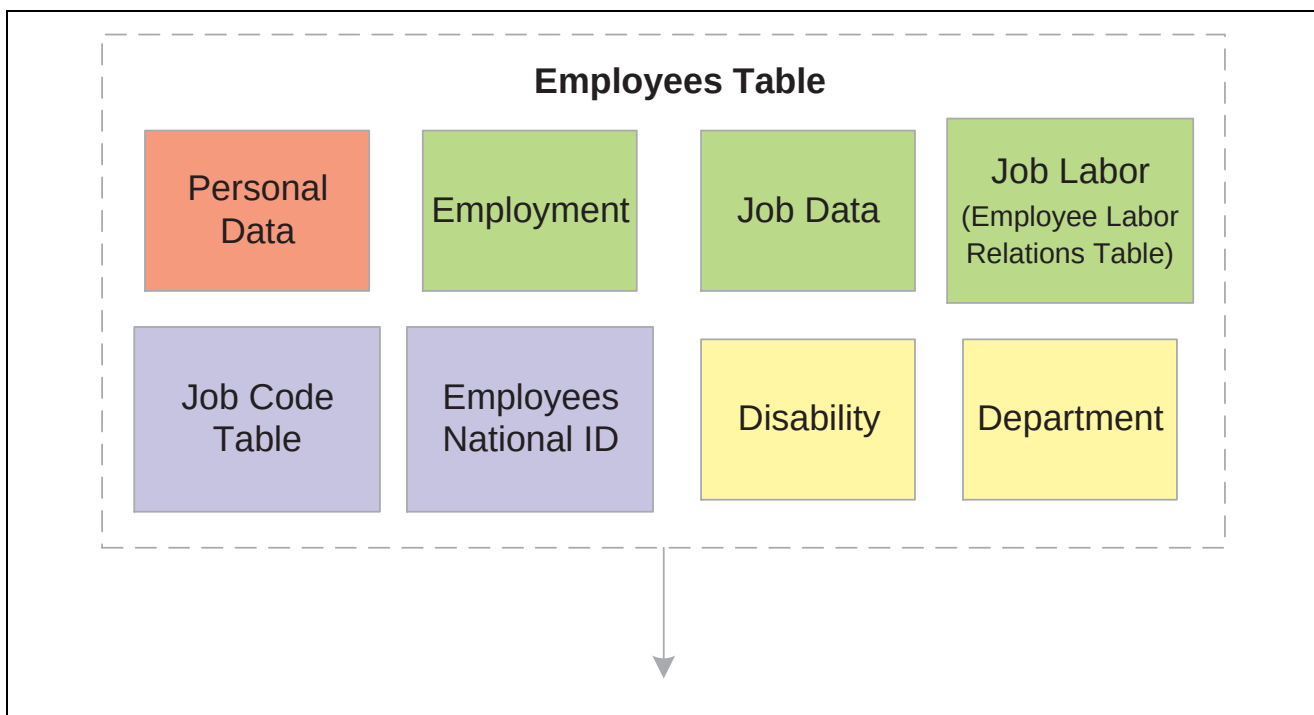
Enter the employee information, search and select the employee record to view.

Refreshing Tables to Facilitate Reporting

This section lists common elements and provides an overview of refreshing the Employees data table and refreshing the Personal Data table.

Refreshing the Employees Data Table

To generate standard PeopleSoft Human Resources reports quickly, many human resources reports pull data from the Employees table (PS_EMPLOYEES). To make reporting in PeopleSoft Human Resources more efficient, this table combines in one place—in an “extract file”—information from the following tables: PERSON, PERS_DATA_EFFDT, NAMES, ADDRESSES, PERSONAL_PHONE, Job (JOB), Employment Data (EMPLOYMENT), Job Code (JOB_CODE_TBL), Department (DEPARTMENT_TBL), Employees National IDs(PERS_NID), Job Labor (JOB_LABOR), and Disability (DISABILITY). The extract file’s sole purpose is as a report source. Because it isn’t updated dynamically when you hire employees or update their data (doing so would have negative online processing impact), you must refresh the Employees table before running any reports. When you run this process, the system updates the table with data valid before or on the as-of date you specify.



Updating the Employees table using the Refresh Employees Table process (1 of 2)

Report Names

ABS001.SQR (Employee Absence Report)
 ABS003.SQR (Time Lost Due to Absence)
 ABS004UK.SQR (Bradford Report)
 BEN001.SQR (Health Plan Participants)
 BEN002.SQR (Life Insurance Participants)
 ESPP005.SQR (ESPP Purchase Distribution)
 PAY110CN.SQR (Statistics-Canada [Educationl Institutons])
 PER001.SQR (Department Action Notices)
 PER002.SQR (Employee Birthdays)
 PER004.SQR (Emergency Contacts)
 PER005.SQR (Employees on leave of Absence)
 PER008.SQR (Employee Review Audit)
 PER009.SQR (Union Membership)
 PER011.SQR (Competency Inventory)
 PER012.SQR (Departmental Salaries)
 PER099.SQR (Refreash Employees Table)
 PER006 - Crystal Reports (Mailing Labels)

Updating the Employees table using the Refresh Employees Table process (2 of 2)

A useful feature of the Employees table is that you can refresh it to show a specific date, so you can report based on how things were at that time. This might be useful if an organization needed to reconstruct its organization over the last several years to research its promotion policies.

Update the Employees table using the Refresh Employees Table process before running any of these reports so that the report contains all changes made to your employee files.

Refreshing the Personal Data Table

Human Resources reports also pull data from the Personal Data table. This table combines information from these tables: PERSON, PERS_DATA_EFFDT, NAMES, ADDRESSES, PERSONAL_PHONE. Like the Employees Data table, the Personal Data table is a report source only. It updates through the process described below. The PERSONAL_DATA table is kept in sync with the online changes using a Message Subscription process on the message PERSON_BASIC_SYNC. This means that any process that publishes the PERSON_BASIC_SYNC message will cause PERSONAL_DATA to be updated. You may want to refresh the Personal Data table before running reports, but the online process should be keeping it up to date. You can refresh PERSONAL_DATA at any time without affecting the online updates if you suspect that something did not get updated, or you are having problems with the message queue.

Common Elements Used to Refresh Tables to Facilitate Reporting

As Of Date

Indicate the As Of Date to execute the processes. The process selects the new data based on the date you enter and populates the table. It includes only employees who are active, on leave of absence, or suspended. The process excludes any *terminated* employees.

Pages Used to Refresh Tables to Facilitate Reporting

Page Name	Object Name	Navigation	Usage
Refresh Employees Table - Parameters	PRCSRUNCNTL	Set Up HRMS, System Administration, Database Processes, Refresh EMPLOYEES Table	Reflect back to a specific date or period for employee data reporting.
Refresh Personal Data Table - Parameters	PRCSRUNCNTL	Set Up HRMS, System Administration, Database Processes, Refresh PERSONNEL RPT Table	Updates the PS_PERSONAL_DATA table.
Ad-Hoc Process Request	PRCSRUNCNTL	Workforce Administration, Workforce Reports, Request Ad-hoc Process	Run several or all Administer Workforce reports that do not require parameters.
As-of Date Request	RUNCTL_ASOFDATE	Workforce Administration, Workforce Reports, Create As-of Date Request	Run several or all Administer Workforce reports for which you specify an as-of date.
Calendar Year Request	RUNCTL_CALEDARYR	Workforce Administration, Workforce Reports, Create Calendar Year Request	Run several or all Administer Workforce reports for which you specify a calendar year.
From/Thru Dates Request	RUNCTL_FROMTHRU	Workforce Administration, Workforce Reports, Create From/Thru Dates Request	Run several or all Administer Workforce reports for which you specify a from date and thru date range.

Running a Database Audit

This section explains how to run the Database Audit report. This audit monitors changes, additions, or deletions made to sensitive fields such as salary amounts.

Page Used to Run a Database Audit

Page Name	Object Name	Navigation	Usage
Database Audit	RUNCTL_FROMTHRU	Workforce Administration, Workforce Reports, Database Audit	Run the Database Audit report (PER029).

CHAPTER 14

Viewing Summary Workforce Information

This chapter discusses how to:

- View employee job history.
- View employee personal and job data.
- View other summary pages in PeopleSoft Human Resources.

Viewing Employee Job History

Viewing employee job history provides a quick summary of important job details of current and historic employment records.

This section discusses how to:

- View an employee's job history.
- View salary compensation information.

Pages Used to View Employee Job History

Page Name	Object Name	Navigation	Usage
Job Summary	JOB_SUMMARY	Workforce Administration, Job Information, Review Job Information, Job Summary	View an employee's job history.
Job Summary JPN	JOB_SUMMARY_JPN	Workforce Administration, Job Information, Review Job Information, Job Summary JPN	View a Japanese employee's job history, including additional appointment total. Access details of additional appointments.
Salary Components	COMP_JOB_SUMM_SEC	Click Components on the Compensation tab of the Job Summary page.	View salary compensation information.
Comp Rate Code Secondary Panel (compensation rate code secondary panel)	COMP_RATECD5_SEC	Click Details on the Salary Components page.	Review the description, compensation rate type, and rate code class associated with the rate code.

See Also

[Chapter 6, “Hiring Your Workforce,” page 63](#)

[Chapter 13, “Updating Workforce Information,” page 319](#)

[Chapter 16, “\(USF\) Processing Personnel Action Requests,” page 391](#)

Viewing an Employee’s Job History

Access the Job Summary page.

Job Summary			
Santos, Antonio	Employee	EmplID: KU0010	Empl Rcd#: 0
Job Information			
Customize Find View All First 1-5 of 5 Last			
General	Job Information	Work Location	Compensation
Eff Date	Sequence	Action	Action Reason
07/01/1998	1	Pay Rate Change	
07/01/1998	0	Completion of Probation	Probation Completed
04/04/1998	0	Return from Leave	Return From Leave
02/27/1998	0	Paid Leave of Absence	Short-Term Disability
09/12/1997	0	Hire	

Job Summary page

Common Page Information

Eff Date (effective date) and **Sequence** The effective date and effective date sequence, if any, is available for each personnel action. The effective date sequence tracks actions that occur on the same day.

General Tab

See the above exhibit for an example of this tab.

Action and Action Reason Displays the action taken and reason for the action.

Job Information Tab

Access the Job Information tab.

Job Information								
Customize Find View All First 1-5 of 5 Last								
General	Job Information	Work Location	Compensation					
Eff Date	Sequence	Jobcode	Empl Type	Empl Status	Full/Part Time	Reg/Temp	Standard Hours	Work Period
07/01/1998	1	Admin Asst	Hourly	Active	Full-Time	Regular	40.00	Weekly
07/01/1998	0	Admin Asst	Hourly	Active	Full-Time	Regular	40.00	Weekly
04/04/1998	0	Admin Asst	Hourly	Active	Full-Time	Regular	40.00	Weekly
02/27/1998	0	Admin Asst	Hourly	Leave W/Py	Full-Time	Regular	40.00	Weekly
09/12/1997	0	Admin Asst	Hourly	Active	Full-Time	Regular	40.00	Weekly

Job Summary: Job Information page

Jobcode	View job code information for this employee after each personnel action.
Empl Type (employee type)	Displays the employee type after each personnel action..
Empl Status (employee status)	Displays the employee's status after each personnel action.
Full/Part Time	Indicates whether the employee is full or part time after each personnel action.
Reg/Temp	Indicates whether the employee is regular or temporary after each personnel action.
Standard Hours	Displays the standard hours after each personnel action.
Work Period	Displays the work period after each personnel action.

Work Location Tab

Access the Work Location tab.

Job Information								
Customize Find View All First 1-5 of 5 Last								
General	Job Information	Work Location	Compensation					
Eff Date	Sequence	Position	Company	DeptID	Sal Plan	Grade	Pay Group	Frequency
07/01/1998	1	Admin Asst	GBI	HR	KU01	004	KU1	Weekly
07/01/1998	0	Admin Asst	GBI	HR	KU01	003	KU1	Weekly
04/04/1998	0	Admin Asst	GBI	HR	KU01	003	KU1	Weekly
02/27/1998	0	Admin Asst	GBI	HR	KU01	003	KU1	Weekly
09/12/1997	0	Admin Asst	GBI	HR	KU01	003	KU1	Weekly

Job Summary: Work Location page

Position Nbr (position number)	If you're driving part or all of PeopleSoft Human Resources by position, you'll see a position number for each position to which you've assigned this employee.

Compensation Tab

Access the Compensation tab.

Job Information								
Customize Find View All First 1-5 of 5 Last								
General	Job Information	Work Location	Compensation					
Eff Date	Sequence	Annual Rt	Monthly Rt	Daily Rt	Hrly Rate	Currency	Change Percent	Components
07/01/1998	1	18,512.00	1,542.67	71.20	8.90	USD	7.879	Components
07/01/1998	0	17,160.00	1,430.00	66.00	8.25	USD	0.000	Components
04/04/1998	0	17,160.00	1,430.00	66.00	8.25	USD	0.000	Components
02/27/1998	0	17,160.00	1,430.00	66.00	8.25	USD	0.000	Components
09/12/1997	0	17,160.00	1,430.00	66.00	8.25	USD	0.000	Components

Job Summary: Compensation page

Annual Rt (annual rate),
Monthly Rt (monthly rate),
Daily Rt (daily rate),
Hrly Rate (hourly rate),
Currency, and **Change Percent**

View the employee's compensation rate in annual, monthly, daily, or hourly terms, and in a given currency. If a personnel action results in a change in the compensation rate for this employee, the system displays the percentage of change.

Components

Click to access the Salary Components page.

Viewing Salary Compensation Information

Access the Salary Components page.

Salary Components

Santos, Antonio
ID: KU0010
Empl Rcd#: 0

Compensation Rate: 1,542.67 USD

Compensation Frequency: M Monthly

Pay Components

Amounts	Changes	Conversion						
Rate Code	Seq	Details	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1 NAHRLY	0	Details	8.90	USD	Hourly			

OK Cancel

Salary Components page

Common Page Elements

Rate Code

Select a rate code. Rate codes are IDs for pay components. The system inserts any compensation information associated with this rate code in the compensation grid.

Note. If a seniority rate code, or group-based rate code, is inserted as a default on the Compensation page, the values for these rate codes are display-only; you can't delete them.

Seq (sequence)

Indicates multiple use of the same rate code if it is used more than once.

Amounts Tab

See the above exhibit for an example of this tab.

Details

Click to access the Comp Rate Code Secondary Panel page and review the description, compensation rate type, and rate code class associated with the rate code.

Comp Rate (compensation rate) and **Currency**

The compensation rate for the compensation components, and the currency.

Frequency

The compensation frequency for the employee.

Points

The salary points associated with this rate code, if any. Set the points monetary value on the Company Table page. Associate point value (an integer) with rate codes on the Default Compensation and Non-Base Compensation pages, Salary Step Components page, and Compensation page. To use points, select the Salary Points check box on the Installation Table page.

Percent

If the rate type for this rate code is percent, the system displays the percent to be applied to the job compensation rate or to a rate code group (if you are using rate code groups).

Rate Code Group

Select a rate code group. A rate code group enables you to be more specific when calculating percentage-based components as part of your employee compensation package.

Changes Tab

Access the Changes tab.

Pay Components								
Amounts			Changes			Conversion		
	Rate Code	Seq	Manually Updated	Change Amount			Change Points	Change Percent
1	NAHRLY	0	☒	0.650000	 USD	Hourly		7.879

Salary Components page – Changes tab

Manually Updated

Indicates whether the pay component was manually updated, or the pay component contains only defaulted values.

Change Amount

The overall change amount in this pay component rate.

Change Points

The overall change amount (in points) for this pay component. This field is visible only if Salary Points is selected on the Installation Table page.

Change Percent

The overall change amount for this pay component. This field isn't available for rate codes that have a rate code type of percent or points.

Conversion Tab

Access the Conversion tab.

Pay Components								
Amounts			Changes		Conversion			
	Rate Code	Seq	Source	Default Without Override	Apply FTE	Converted Comp Rate		
1	NAHRLY	0	Manual	☐	☐	1,542.666667	USD	Monthly

Salary Components page – Conversion tab

Source	Indicates how the pay component got into the Compensation grid. 'Manual' indicates that the pay component was added manually; 'Salary Step' indicates that the pay component was defaulted in from the Salary Step; 'Job Code' indicates that the pay component was defaulted in from the Job Code, and so on.
Default Without Override	Indicates whether the you can change the default values of the pay component, or the values for this rate code are default values and display-only.
Apply FTE (apply full time equivalent)	Select if you want the value associated with the rate code to be multiplied by the FTE factor for annualization and deannualization. FTE is the percent of full time the employee should normally work in the corresponding job. This field isn't available for rate codes of type percent.
Converted Comp Rate (converted compensation rate)	The converted compensation rate for this pay component. The system converts all base pay components to the currency and compensation frequency you specify.

(USF) Viewing Employee Personal and Job Data

Use the Personal Data inquiry component to view employee personal and job data.

This section discusses how to:

- View employee personal data.
- View employee job data.
- View employee benefit programs.

Pages Used to View Personal and Job Data

Page Name	Object Name	Navigation	Usage
Personal Data	GVT_PERS_INQ	Workforce Administration, Job Information, Review Job Information, Personal Data USF, Personal Data	View employee personal data.
Mailing Address	GVT_MAILADDR_SEC	Click Mailing Address on the Personal Data page.	View the employee's mailing address.
Veterans Info (veterans information)	GVT_VETINF_INQ_SEC	Click Veterans Info on the Personal Data page.	View veteran's information for this employee.
Job Data1	GVT_JOB_INQ	Workforce Administration, Job Information, Review Job Information, Personal Data USF, Job Data1	View employee job data.
Benefits/Retirement Data	GVT_BENDAT_INQ_SEC	Click Benefits/FEHB Data on the Job Data1 page.	View the benefit program in which the employee is enrolled for benefits in PeopleSoft Human Resources or in PeopleSoft Benefits Administration.
Job Data2	GVT_JOB_INQ2	Workforce Administration, Job Information, Review Job Information, Personal Data USF, Job Data2	View additional job data, including quoted pay and expected pay information.
Employment Data	GVT_EMPLOY_INQ	Workforce Administration, Job Information, Review Job Information, Personal Data USF, Employment Data	View employment data.

Viewing Employee Personal Data

Access the Personal Data page.

Personal Data		Job Data1	Job Data2	Employment Data
Haring,Jamie		Effective Date: 01/09/2002		
Name:	Ms Haring,Jamie	Gender:	Female	
Marital Status:	Unknown	Race:	Handicap: No Handicap	
Home Address				
Country:	USA United States			
Address:				
Birth Info		Citizenship Status:	Date Entitled to Medicare	
DOB:	01/01/1970	Draft Status:		
Place:				
State:		Country:	USA	
Mailing Address		Veterans Info		

Personal Data page

The Personal Data page displays information on employee hire date, birth date, home address, marital status, birth information, citizenship, draft status, Medicare entitlement, race, and handicaps. Click the Mailing Address link to view the employee's mailing address. Click the Veterans Info link to view veteran's information for this employee.

Viewing Employee Job Data

Access the Personal Data - Job Data1 page.

Personal Data	Job Data1	Job Data2	Employment Data
Haring, Jamie		Effective Date: 01/09/2002	
Position:	19000420	- -	Director-Sales Benefits/FEHB Data
Job Code:	420125	- -	
Employee Type:	Hourly	Type of Appointment:	Career (Competitive Svc Perm)
Empl Class:		Posn Occupied:	
Reg/Temp:	Regular	Work Schedule:	Full Time
Supervisor Level:		Holiday Schedule:	
Agency:	GBI	Global Business Institute	LEO Position: N/A
Sub-Agency:			Standard Hours: 40.00
Department:	22000		FLSA Status: Nonexempt
Location:	KUNY00		Regular Shift: N/A
Tax Location Code:	HX19CA	ST - Test California	

Personal Data - Job Data1 page

This page displays the employee's position number, job code, employee type, class, type of appointment, position occupied, work schedule, agency, subagency, department, location, tax location, LEO position, FLSA status, and other job-related information.

Click the Benefits/FEHB Data link to view information on this employee's benefits and retirement data.

Viewing Employee Benefit Programs

Access the Personal Data - Job Data1: Benefits/Retirement Data page.

Benefits/Retirement Data	
Benefits Employee Status:	Active
BAS Group ID:	
Benefit Program:	KU1 GBI US Fulltime Benefit Pgm
FEHB Eligibility	
Not Eligible	
FEGLI Code: Basic Only	
Annuitant Indicator:	Retirement Plan:
Not 9	FERS and FICA
Applicable	
Previous Retirement Coverage:	FERS Coverage:
Never Covered	Automatically Covered By FERS
Annuity Commencement Date:	
CSRS Annuity Offset Amount:	CSRS Frozen Service: 0000
OK Cancel	

Personal Data - Job Data1: Benefits/Retirement Data page

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Setting Up Core Human Resources Base Benefits Tables”

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, “Enrolling Participants”

Viewing Other Summary Pages in PeopleSoft Human Resources

Several other display-only pages summarizing employee data are available for you to review in PeopleSoft Human Resources. Most of them derive information you enter in other PeopleSoft Human Resources business processes, such as Planning Salaries, Track Global Assignments, and Administering Training. However, you'll also find them useful for planning and analysis when you work in the Workforce Administration menu.

Following are some of the summary pages:

- **Employee Data Summary:** Displays information on employee current status, hire date, birth date, marital status, standard work hours, pay group, job code, and other job- and salary-related information.

The Employee Data pages are also in the Benefits menu.

- **Career Assignment Summary:** Displays the actual job path the employee has followed in the organization. By tracking employee movements through salary structures and manager levels, you'll get a feel for where the employee has been in your organization so far.
- **Compensation History:** Displays the history of all pay rate changes the employee has received, which is particularly useful when you are planning new increases.
- **Immediate Family Summary:** Lists all dependents that are a part of the employee's immediate family. Immediate family is defined as dependents that are the employee's spouse, son, or daughter. You'll find this page helpful for determining eligibility for various types of benefits your organization offers to employees, their spouses, and children.
- **Training Summary:** Displays student training history, which is helpful when determining whether students are receiving adequate training to perform their current jobs; to see if they've taken all course prerequisites; and for career and succession planning.
- **Injury Summary:** Provides an overview of the health and safety incidents in which this individual has been involved, including injuries and illnesses and the nature of the incidents.

CHAPTER 15

(USF) Administering Personnel Action Requests

This chapter provides an overview of administering personnel action requests (PAR) and discusses how to:

- Track and route a personnel action request (PAR) through reviews and completion.
- Schedule PAR push.
- Initiate and request personnel actions.
- Authorize and approve personnel actions.
- Process human resources personnel actions.
- Cancel or correct a personnel action request.
- Print request for personnel action and notice of personnel action reports.
- View summary pages.
- Generate a Personnel Actions History report.
- Generate a Wage and Separation report.

Understanding the Administering PAR System

The administering PAR system provides you with the power to process action requests quickly and easily. The system automatically routes a wide variety of requests directly to reviewing officials, and on to human resources, in the path your agency designates.

If anyone needs further information, the system automatically routes that inquiry back to the originator. All involved are included in the communication loop and always know that their requests are moving through a well-mapped review, authorization, and approval cycle.

Note. Keep in mind that the description and samples described throughout this book are illustrative, flexible models that you can adapt for your agency's personnel administration system. Your agency can set up the Administer Workforce system's routing, security, accessing, processing, and many other features to meet your individual agency needs and requirements.

Using a streamlined menu structure, you can navigate quickly and easily through the whole process. Using PeopleSoft workflow, you indicate the level of authorization and the system routes the request through the process for you.

Significant features of the PAR system include:

- Flexible work-in-progress processing.

- Cancellation and correction functionality.
- Reviewed flag processing for retroactive personnel actions.
- Enhanced navigation with pages.
- Issuing awards and bonuses.
- Detail assignment processing.
- Support for the personnel office identifier (POI) signature requirement.

Common Elements Used in This Chapter

PAR Status

The PAR status code automatically defaults to *Requested* for new actions. Leave this as a work-in-progress request with that status until you have complete data. After you have completed all the necessary information, keep the PAR status as *Requested* to send it on to human resources officials for approval and processing.

If you aren't ready to submit the request, change the status to *Initiated*, and keep working on it until you're done. Then change the status to *Requested* to submit it.

After completing the HR Request pages and reviewing the data, assign a status of *Processed by HR* to approve and finalize this request.

Once you assign the status of *Processed by HR*, the request becomes an actual event and is posted in the system to interface with PeopleSoft Payroll, Manage Base Benefits, or other related areas.

If the request is invalid or needs further information, assign a status of *Disapproved* or *Return to Sender*.

Prerequisites

Begin every personnel action request on the Data Control page. The first time you open the page, the most recent personnel action request appears automatically. Before creating a new request, you must insert a new row for all actions or changes.

In order to save time, the system assumes you want to continue viewing and updating information on the same employee, so when you move to a new page in the group, information for that same employee appears automatically.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “(USF) Setting Up Human Resources Management Tables”

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “(USF) Setting Up the Work-in-Progress Management System”

Chapter 7, “(USF) Hiring Employees,” Entering Information for the Hiring Process, page 143

Understanding Workflow

Many of the tasks you perform throughout the day are part of larger tasks that involve multiple steps and several people in your organization working together. PeopleSoft workflow tools help you build the larger process into your PeopleSoft Human Resources system, automating vital business tasks. You can tie together the individual steps so that PeopleSoft can help coordinate the activities. Because the system has the big picture and knows what you are trying to accomplish, it can automatically start the next step in the workflow, following your organization's business rules.

Using workflow capabilities for administering personnel actions, the PAR status indicates the steps in routing and provides employees, supervisors, and human resources professionals easy access, surveillance, and security in the request management process. While providing options along the way for more time, further information, or return to sender, workflow routes requests by sending personnel actions through a cycle to initiate, request, authorize, and approve requests. Workflow then sends them on to human resources for final processing. The automated workflow process ensures the action request goes through all the reviews your agency needs until it becomes an actual event.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Using PeopleSoft Workflow”

Tracking and Routing a PAR Through Reviews and Completion

The Employee Request, Supervisor Request, and HR Request components are identical. The only difference is in the type of data that is accessible to each group, according to security options and allowable actions.

Note. The information you need to track and route a PAR is the same type of information you enter to hire employees. Use the same pages for both. We discuss these pages in “(USF) Hiring Employees.”

Your agency determines the actions and data available to employees, supervisors, and human resources processors. Actions may include creating requests, issuing approvals and authorizations, and finalizing actions. Or they may require returning an action to the originator; asking for more information; or withdrawing, canceling, or correcting an action. Decisions on these issues are implemented using the WIP Activity Table (work-in-progress activity table) page.

Employees may request only their allowable actions; therefore, a user sees only certain options, such as Family/Benefits Change or Retirement. Supervisors may request, approve, and authorize those and other specific actions. When a supervisor opens the pages, their list reflects whatever your agency designates, such as promotion, demotion, detail assignment, reassignment, bonuses and awards, and others. They may also return an action to the originator for more information, or disapprove a request and render it inactive.

Human resources officials have the authority to initiate, approve, and finalize all possible actions. Therefore, human resources officials, along with hiring, tenure changes, and other actions that an employee or supervisor wouldn't usually initiate, can access *all* of the personnel actions in any phase of the cycle. For *finalized* actions that have already completed the processing cycle, human resources has the exclusive right to cancel and correct.

The PAR processes provide both flexibility and modification capacity. You can process new personnel actions that are effective-dated prior to existing personnel actions and define the codes for requests in a truly user-defined environment.

See Also

Chapter 7, “(USF) Hiring Employees,” Using the Personnel Action Request (PAR) Process to Hire Employees, page 138

Adding and Updating Data

For U.S. Federal Government customers, to add, update, or change any employee data, you create a PAR. To submit and route and track a PAR automatically through the approval process, assign a PAR work-in-progress status code that indicates its position in the request cycle and determines where to send it.

Automatically Routing the PAR

By changing the request status and saving the page, reviewers acknowledge receipt and approval, and send a PAR forward through workflow. Each review level serves as verification that the information is complete and that the necessary documents are attached. The reviewers may also enter their own comments. Your agency can set up and route request cycles for each type of request from creation through various reviews, including as many or few reviews as desired, and on to final Human Resources completion.

Selecting a PAR Status

If you want to open a request, fill in partial data and then complete it later, open a request and assign a PAR status of *Initiated*. While you gather additional information, the request stays within your own domain and control. You can revisit it as often as needed until you are ready to submit it for review.

When your request data is complete and you want to proceed with the automatic routing review cycle, submit the request by assigning a PAR status of *Requested*. By doing so, you make the request official. Once the originator submits a *Requested* action, workflow retrieves it and automatically routes it to others who are involved in the processing, and the authorizing and approving officials review its merits. It may go through a review cycle that includes *1st Authorized* and *2nd Authorized* by specific supervisors and managers, *Approved/Signed* by second-level managers, and finally to the status of *HR* (processed by HR), according to your agency’s requirements.

If clarification or additional information is needed, a reviewer can choose the status of *Returned for More Information*. Returning it to the originator restarts the process. A reviewer can also disapprove a request by assigning the *Disapproved* status, which stops the process altogether. During the review cycle, the originator can also withdraw a request while it’s still in the work-in-progress status.

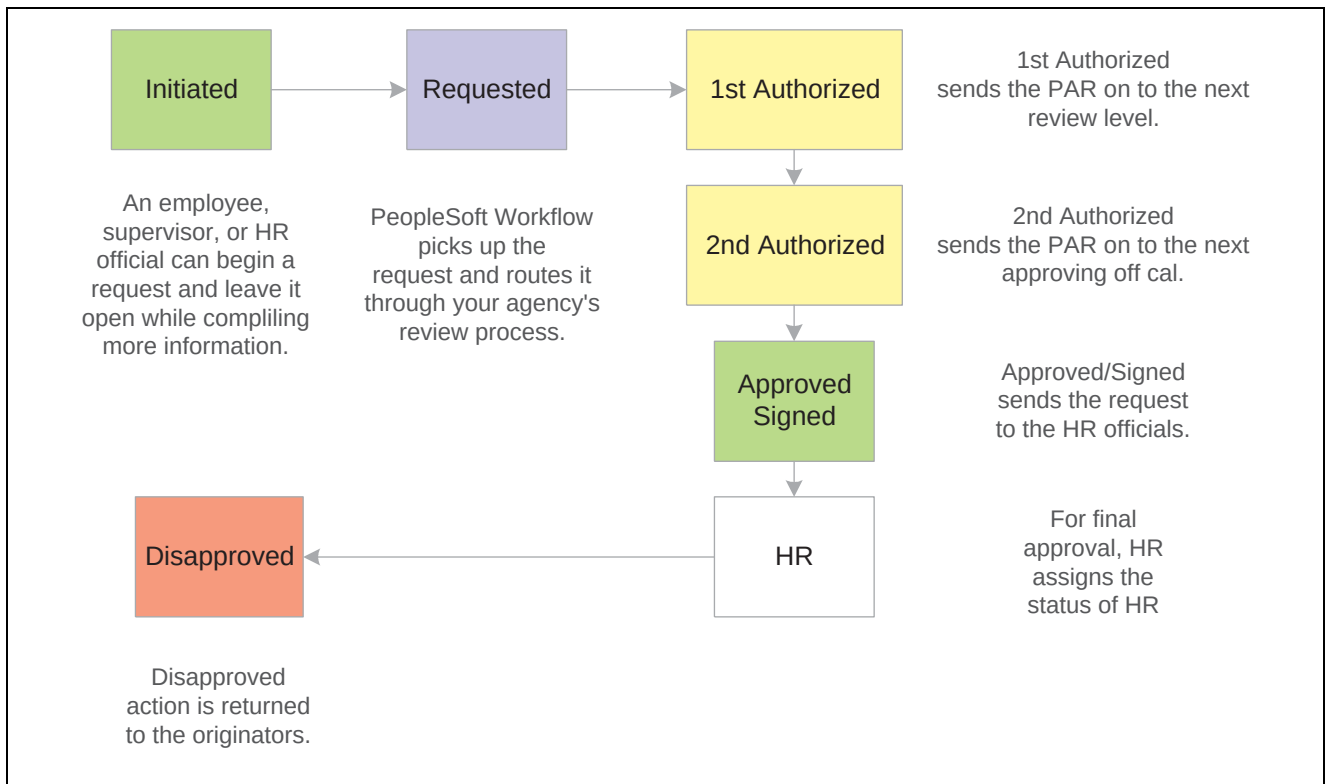
Only the originator can cancel or change and resubmit a request that is in progress. Because other supervisors, managers, and human resources officials don’t have the ability to change request data, if a request needs to be *Canceled*, you must return it to the originator.

When a user chooses a work-in-progress status and assigns a PAR status code, this code indicates the request’s status and position and enables workflow to route and monitor it through the approval cycle.

We provide a general example of the review cycle, though your agency can set it up differently if necessary.

An Overview of PAR

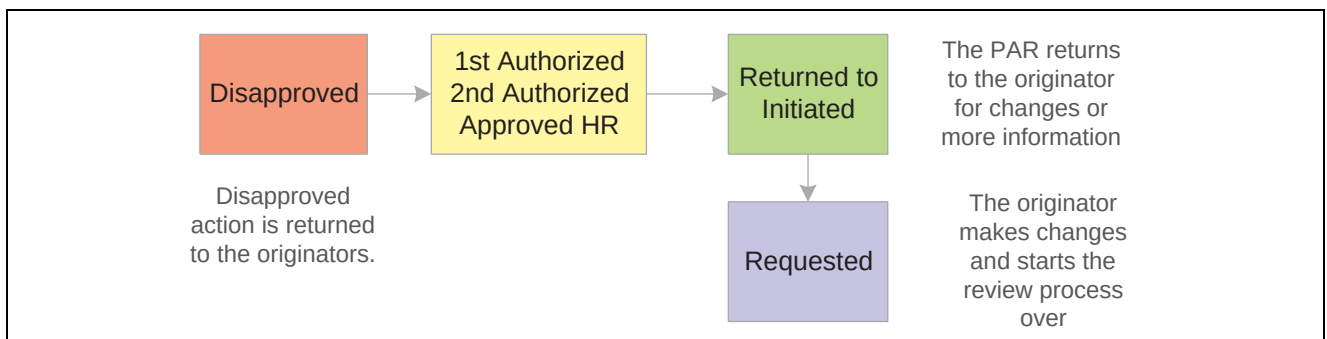
Following is an overview of a sample process:



An example of the process of approving a PAR

Disapproving or Returning a Request

Following is an overview of a sample process disapproving or returning a request:

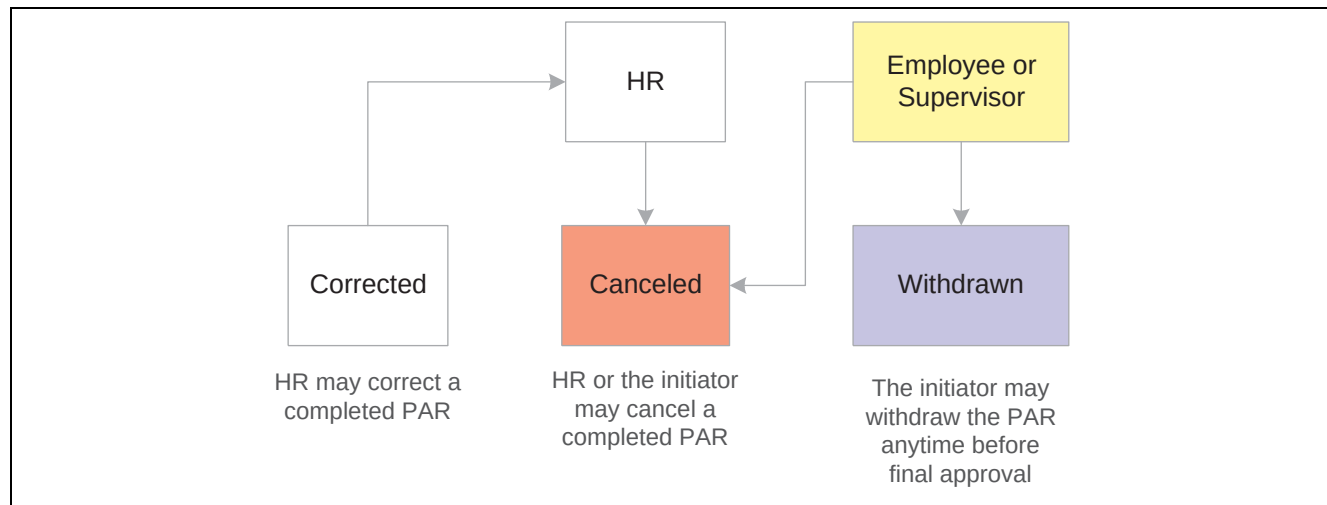


Return or disapproval of a PAR before completion

Note. Although a status of Returned/Disapproved is delivered, workflow isn't part of this feature.

Cancellation, Correction, or Withdrawal of a Request

Following is an overview of a sample process canceling, correcting, or withdrawing a request:



Cancellation, correction, or withdrawal of a PAR

Identifying PAR Status Codes

Following are definitions for each work-in-progress status and PAR status code that are set up in the sample data delivered with your system:

Work-In- Progress Status	PAR Status Code	Definition
Initiated	INI	Indicates an action is open, but not yet submitted as a request. For various reasons, originators may begin a request and then find they need additional time or data before completing their work on that action. By assigning a status of <i>Initiated</i>, originators can leave the request open until it's ready to submit. Supervisors may need extra time to develop supporting documentation, such as job codes, and can assign a status of <i>Initiated</i> to designate that their work is in progress.
Requested	REQ	To submit a request, assign a status of <i>Requested</i>. Most requests then go automatically to the first-level supervisor for approval. An exception is the request for family/benefits change; you may want to set the system up to send this type directly to a human resources (HR) official to be processed. Or when a request originates in the HR department, it may go directly to an HR official to be processed.
1st Authorized	1st	The first-level reviewer assigns a status of <i>1st Authorized</i> to send a request forward to the next review level.
2nd Authorized	2nd	Another first-level reviewer sends a request forward to the next review level by assigning a status of <i>2nd Authorized</i> .

Work-In- Progress Status	PAR Status Code	Definition
Approved/Signed	SIG	A second-level reviewer sends a request forward to an HR official to be processed by assigning a status of <i>Approved/Signed</i> .
Processed By Human Resources	HR	Only human resources officials can assign the status of <i>Processed By Human Resources</i>. They first review and complete the request and may add the appropriate Nature of Action code, Legal Authorities, and Remarks. They indicate final approval by assigning the status of HR. The request then becomes an actual event. A status of HR is final and can't be changed by anyone. Once a request becomes an actual event, it is then available for further consideration and processing by payroll, benefits, interface reports, and other areas.
Return for More Information	RET	Anywhere in the process, a reviewer can request more information or clarification by assigning a status of <i>Returned for More Information</i> and can include a comment such as, "I need further information." The request goes back to the originator. When originators get the returned request, they add the information, reassign a status of <i>Requested</i>, and the process begins again.
Withdrawn	WTH	The original creators of the request may withdraw a request if it is sent back to them for any reason. Human resources may withdraw a request when it is proven invalid or for some reason no longer is needed.
Disapproved	DIS	At any point in the process, a reviewer can disapprove a request by assigning a status of <i>Disapproved</i> and entering the reason in the Comments field. This causes the request to be sent back to the originator either for cancellation or for the originator to change and resubmit it.
Corrected	COR	Only a human resources official has the authority to perform a correction after a request has completed the approval cycle and been finalized.
Canceled	CAN	A human resources official has the authority to perform a cancellation after a request has completed the approval cycle and been finalized. The <i>Canceled</i> status removes the request from the active request system, leaving only the tracking record history. Or if the originator receives a returned request, the originator may assign a status of <i>Canceled</i>.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Using PeopleSoft Workflow”

Processing of PAR Actions

The PeopleSoft Human Resources USF functionality has separate tables for managing PAR, and these tables hold data until each action has been approved and completed by human resources. Any records held in the separate tables haven't completed the PAR process and so virtually don't exist to the rest of the system. After completion, the data is automatically updated to system tables to enable other processes, such as those in PeopleSoft Payroll, Benefits Administration, and Time and Labor.

To support the PAR processing concept, all of these records have been effective-dated and have been tied together with common keys. Because the three records (GVT_JOB, GVT_PERS_DATA, and GVT_EMPLOYMENT) work as one, when a user inserts a row on the Data Control page, that action inserts a row into all three records.

Once a PAR has successfully worked its way through the approval process, is processed by human resources as completed, and has become an actual event, it is ready to be copied into the three counterpart records (JOB, PERS_DATA_EFFDT, and EMPLOYMENT). The process is accomplished instantly, and the user is unaware of updating to the other tables.

However, if the PAR action has an effective date that is later than the system date, when the action is saved, then only JOB is updated. PERSONAL_DATA and EMPLOYMENT are updated only when the date of the action is equal to the system date. This is because the counterpart to GVT_JOB, which is JOB, is effective-dated. Therefore, it receives the future effective-dated action and ignores it until that date arrives.

Scheduling PAR Push

To push the future effective-dated rows from the PAR tables to the core tables at the correct time, PeopleSoft has developed an Application Engine process called PAR Push that should be scheduled to run at the beginning of each day.

The PAR Push process checks for any PARs that haven't been copied into the counterpart core records and that have an effective date less than or equal to the system date, and then copies them over.

By scheduling the PAR Push process to run every day, no intervention by the user is required. The system is automatically always held in sync.

Whether the online SQLExecs or the application engine is moving the data, the method used is basically the same. Three views have been created to extract the correct data from the PAR records. These views have been developed to have an output that is structured identically to the record into which data is inserted.

When the system determines that an action should be copied to the counterpart tables, it inserts into those tables with a subselect that is a Select * from the appropriate view where the keys equal the row that requires copying.

The other two, GVT_PD_PUSH_VW and GVT_EMP_PUSH_VW, select the completed row that is the Max Effective Date and Max Effective Sequence less than the system date. This is because the records being inserted aren't effective-dated. Therefore, only one row is inserted—the row that is correct on the date in question. The result of the use of these views is that all additions or removals of fields on the PAR records, and to their counterparts, require adjusting the views to keep them in sync.

Page Used to Schedule PAR Push

Page Name	Object Name	Navigation	Usage
Push PAR to Core	PAR_PUSH1	Workforce Administration, Collective Processes, Process PAR Push USF	Schedule the PAR Push process (FGPAR_PU).

Initiating and Requesting Personnel Actions

Most of the various PARs are created in a similar way. A good representative example is a family/benefits change request, which we'll review in this chapter. In other chapters of this book, we cover other examples of the most highly used requests, such as hiring, awards and bonuses, leave with or without pay, data changes, and termination.

The only significant differences between submitting the various requests are the action and reason codes that you assign and the data that is entered. Most of the requests involve similar steps: You begin on the Data Control page, insert a new row and indicate the desired action, and then tab to another data page in the same group to enter further information, if necessary.

For example, when you initiate a request for changing benefit choices, enter data on the Data Control page and then move to the Personal Data page. For some requests, such as a leave without pay action, however, you enter data *only* on the Data Control page.

You can always view data on other pages, and view summary pages, for decision-support purposes.

See Also

Chapter 7, “(USF) Hiring Employees,” Using the Personnel Action Request (PAR) Process to Hire Employees, page 138

Chapter 16, “(USF) Processing Personnel Action Requests,” page 391

Authorizing and Approving Personnel Actions

Once a request has been submitted, the PeopleSoft workflow system automatically routes the request to designated supervisors and managers for authorizations and approvals.

Supervisors and human resources officials can approve and authorize requests that cover many possible actions involving hire, return to duty, leave with or without pay, suspension, promotion, bonus, award, change in pay, and others. They can also return a request and ask for more data or disapprove it so that it is returned to the originator and its cycle ended.

If you are a designated reviewer, you see the request item in your worklist if you are using the PeopleSoft Navigator display. To authorize or approve a request, click Work It!, and the system automatically transfers you to the 1st Rqst Authorization, 2nd Rqst Authorization, or Approve Request component. You can also access the request from the Workforce Administration, Job Information menu.

You see the exact same screens that the initiator entered data into, beginning with the Data Control page. However, the information you see is display only and unavailable for entry. Review the data on the Data Control page, including the PAR Remarks and Tracking Data, as well as data on any other page that is relevant to the request. To approve the request, change the PAR Status code on the Data Control page to the appropriate choice, such as *1st Authorized*, *2nd Authorized*, or *Approved/Signed*. The request is then routed to human resources officials for completion and processing.

If you need more information or want to disapprove the request, change the PAR Status code to *Return for More Information* or *Disapproved*.

The authorization process works exactly the same way regardless of what the request is, such as data change, award, bonus, or recruitment. Once the authorizing officials have completed their work and entered a new PAR status code, the request goes automatically to the next level in the process.

Human Resources Processing of Personnel Actions

Once a request has been through the initiation and request process and has passed the authorization and approval processes, it goes directly to the human resources office for final processing. A human resources official can submit human resources-specific actions and review and finalize personnel actions that have already been requested, authorized, approved, and are ready to become actual events.

The HR Request pages are reserved specifically for the human resources officials, so this part of the system has overviews, controls, additional navigational capacity, and maneuverability. Here you can *access* all requests, *view* all data, *finalize* all actions, and *print* all reports.

The HR Request component is the same as the Supervisor Request, 1st Rqst Authorization, and 2nd Rqst Authorization components, only with additional PAR Status options, such as *Processed by HR* and *Return to Sender*.

Canceling or Correcting a Personnel Action Request

Once a request has the PAR status *Processed by HR*, it remains as a record in the system. However, it's possible to correct or cancel it by, essentially, creating a new action that references the initial request and gives it a new status. Only human resources officials may perform a correction.

To access a processed request that you want to correct:

1. Open a new request in the Data Control page of the Correct Personnel Action component.
2. Insert a new row by clicking the Insert Row button or pressing F7.

The system automatically enters a PAR Status of *COR*. Enter the correct data.

To access a processed request that you want to cancel:

1. Open a new request in the Data Control page of the Cancel Personnel Action component.
2. Insert a new row by clicking the Insert Row button or pressing F7.

The system automatically enters a PAR Status of *CAN*.

See Also

Chapter 7, “(USF) Hiring Employees,” Using the Personnel Action Request (PAR) Process to Hire Employees, page 138

Printing Request for Personnel Action (SF-52) and Notice of Personnel Action (SF-50) Reports

Employees and supervisors can print an action request (SF-52) anytime. Human resources officials can also review a personnel action request report (SF-50) that summarizes various aspects of employee and job request data in printed form.

This section discusses how to:

- Print an action request (SF-52).
- Run the Personnel Action Report.

Pages Used to Print a Request for Personnel Action /Notice of Personnel Action

Page Name	Object Name	Navigation	Usage
Data Control	GVT_JOB0	• Workforce Administration, Increase Workforce, Hire Employee USF, Data Control • Workforce Administration, Job Information, Employee Request USF, Data Control • Workforce Administration, Job Information, Supervisor Request USF, Data Control • Workforce Administration, Job Information, HR Request USF, Data Control	Print an action request (SF-52).
Notice of Personnel Action USF - Parameters , Request Personnel Action USF - Parameters	RUNCTL_PAR	• Workforce Administration, Job Information, Reports, Notice of Personnel Action USF, Parameters, Parameters • Workforce Administration, Job Information, Reports, Request Personnel Action USF, Parameters, Parameters	Prints the official Notification of Personnel Action form used to notify employee and payroll office of the action, record the action in the Official Personnel Folder, and provide a chronological record of actions that have occurred.
Notice of Personnel Action USF - Select Data , Request Personnel Action USF - Select Data	RUNCTL_PAR2	• Workforce Administration, Job Information, Reports, Notice of Personnel Action USF, Parameters, Select Data • Workforce Administration, Job Information, Reports, Request Personnel Action USF, Parameters, Select Data	After filtering the data with the parameters defined on the Parameters page, use the Select Data page to select employee data for printing PARs

Printing an Action Request (SF-52)

Access the Data Control page.

To produce a printed Request for Personnel Action form (SF-52), use the menu Print command or click the Print SF-52 request button. The system asks whether to print the SF-52 to a printer or to a file. If you choose Printer, you must specify the printer location.

Before saving and printing this request, ensure that the employee ID is the one you want to appear on the form. An assistant processing an action on an authorized official's behalf, who wants that official's information to appear on the SF-52 and become part of the official audit trail for this action, should select the Override Opr EmplID check box and enter the employee ID and employee record number of the official for the action on the Job Tracking Info page.

The system defaults your printer selection to *LPT1*; override this if needed. If you select File, specify the name of the file to send your output to (including the drive and directory names). Once you enter these parameters, the system runs a Structured Query Report (SQR) to create the SF-52 for you. You can print an SF-50 only when the action has a status of *Processed by HR*.

Running the Personnel Action Report

Access the Notice of Personnel Action USF - Parameters page or Request Personnel Action USF - Parameters page.

Request Personnel Action USF - Parameters page

PAR Type (personnel action request)	This field is available for entry only if you selected the Request for Personnel Action menu item. Select the type of PAR that you want to print.
Copies Requested	This group box is available for entry only if you selected the Notification of Personnel Action menu item. Select the copies that you want to print. Available values are Employee, OPF, Payroll, and Utility.
Criteria Processed	The following elements appear in the Criteria Processed group box.
On-line	Select if you want to immediately print the PARs you select.
Within Batch Program	Select if you want to save your filtering criteria for later processing.

Filter Criteria	The following elements appear in the Filter Criteria group box.
EmplID (employee ID), SSN (social security number), Name , PAR Status , Department , Location , NOA Code (nature of action), and Business Unit	Filter actions by employee ID, employee social security number, PAR status, department, location, NOA code, or business unit.
PAR Status Date Range	The following elements appear in the PAR Status Date Range group box.
PAR Status	To filter by PAR status, select a status. The Begin Date and End Date fields become available when you select a PAR status.
Filter	When you click this button, the system selects the records that match your filter criteria and displays them on the Select Data page.
Filtered PAR Data	The system displays information about the PARs that it filtered based on the parameters you specified on the Parameters page. Use the check box at the beginning of each data row to select individual PARs and add them to the list of Selected PARs to Print when you click Add Selected. You can click the Add All button to add all of the PARs to the list without selecting any check boxes.
	Click this button to view the values of all of the filter criteria for this PAR.
Add All	Click this button to add all PARs from the Filtered PAR Data section to the Selected PARs to Print section.
Add Selected	Click this button to add the selected PARs from the Filtered PAR Data section to the Selected PARs to Print section.
Remove Selected	Click this button to remove selected PARs from the Selected PARs to Print section.
Remove All	Click this button to remove all PARs from the Selected PARs to Print section.
Selected PARs to Print	The system transfers the information for the PARs that you selected to add to the list. These PARs print when you run the report. If you want to remove any of the selected PARs, select the check box at the beginning of each data row and click the Remove Selected button. Remove all PARs by clicking the Remove All button.

Viewing Summary Pages

To view a summary of employee data, use the dynamic inquiry pages and display-only pages that summarize data entered in other pages throughout the system, including Job Summary, Personal Data, Job Data 1 and 2, and Employment Data pages.

See Also

Chapter 14, “Viewing Summary Workforce Information,” page 359

Running Personnel Action History Reports

This section discusses how to generate the Personnel Actions History report.

The Personnel Actions History report (FGHR017) lists all employees affected by each of the job actions you enter on the run control page. It prints the following information:

- Employee name
- Department
- Effective date
- Reason for the action

For each employee the report lists:

- Original hire date
- Total years of service
- Employee type
- Regular/temporary
- Full/part-time
- Job code and title
- Salary grade
- Compensation rate associated with the action
- Supervisor's name

Page Used to Run the Personnel Actions History Report

Page Name	Object Name	Navigation	Usage
Action History Report	RUNCTL_PER015	Workforce Administration, Job Information, Reports, Personnel Actions History USF	Run the Personnel Actions History report (FGHR017).

Generating a Wage and Separation Report

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

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

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

This section discusses how to:

- Enter ES-931 employee identification information.
- Enter ES-931 annual leave information.
- Enter ES-931 severance pay information.
- Generate the ES-931 report.

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

Page Name	Object Name	Navigation	Usage
Setup Wage/Separation USF - Identification	GVT_UCFE_PG	Workforce Administration, Job Information, Reports, Setup Wage/Separation USF, Identification	Enter ES-931 identification information for the wage and separation report. Note. The pages in the Setup Wage/Separation USF component pre-populate the fields for which data is already available and those pre-populated fields are inaccessible. Enter data for the remaining fields since data is required in all of the fields.
Setup Wage/Separation USF - Annual Leave	GVT_UCFE_PAY_PG	Workforce Administration, Job Information, Reports, Setup Wage/Separation USF, Annual Leave	Enter ES-931 annual leave information for the wage and separation report.
Setup Wage/Separation USF - Severance Pay	GVT_UCFE_SEV_PG	Workforce Administration, Job Information, Reports, Setup Wage/Separation USF, Severance Pay	Enter ES-931 severance pay information for the wage and separation report.
Print ES-931	GVT_PRINT_ES931	Workforce Administration, Job Information, Reports, Print Wage and Separation USF	Run the Print Wage and Separation report (ES931).

Entering ES-931 Identification Information

Access the Setup Wage/Separation USF - Identification page.

Identification | Annual Leave | Severance Pay

Wage and Separation Report Find | View All First 1 of 1 Last

EmplID: C10001 Name:

Request Date: 11/19/2002 Local Office: Claim Date: 11/19/2002 + -

Defaulted Data

Separation Date: 11/04/2002 [Edit Information](#)

National ID: 232980986 Date of Birth: 05/25/1958

Work Schedule: FullTime Position Title: Computer Specialist

City: San Francisco State: CA Country: USA

☒ Does this person perform "Federal Civilian Service?" If "No": [Print ES931](#)

☒ Is payroll office address based on SF-8? ☐ If No, has claimant received an SF-8?

Setup Wage/Separation USF - Identification page

- Request Date** The date the information was transmitted.
- Local Office** The numerical ID of the requesting/record holding office.
- Claim Date** The effective date of the claim.
- Print ES931** Click to access the Print Wage and Separation component.
- Does this person perform "Federal Civilian Service?"** Select if the employee performs Federal Civilian Service.
- If No** If the employee does not perform Federal Civilian Service, enter an explanation.
- Is payroll office address based on SF-8?** Select if the payroll office is based on an SF-8.
- If No, has claimant received an SF-8?** Select if the payroll office is not based on an SF-8.

Defaulted Data

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

Entering ES-931 Annual Leave Information

Access the Setup Wage/Separation USF – Annual Leave page.

Identification		Annual Leave		Severance Pay	
Annual Leave Find View All First 1 of 1 Last					
EmplID:	C10001	Name:			
Request Date:	11/19/2002	Local Office:		Claim Date:	11/19/2002
☐ Received a lump-sum payment(s) for terminal annual leave? If 'Yes', and payment was received on or after the beg. date of the base period or if currently entitled to such a payment, then record data below					
Leave Payment Amount					
Payment Amount:		Date of Payment:			
Amount of Terminal Annual Leave			Period of Terminal Leave		
Days:		From:	Time	Date	
Hours:		To:			

Setup Wage/Separation USF -- Annual Leave page

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

Entering ES-931 Severance Pay Information

Access the Setup Wage/Separation USF - Severance Pay page.

Identification		Annual Leave		Severance Pay	
Severance Pay Find View All First 1 of 1 Last					
EmplID:	C10001	Name:	Stankowski,Richard		
Request Date:	11/19/2002	Local Office:		Claim Date:	11/19/2002
☐ Received or is entitled to receive severance pay by any Federal law or agency-employee agreement. If 'Yes', then complete the following information					
Severance Pay Information					
Begin Date:		End Date:			
# Weeks Sev Pay:		Weekly Amount:			
Total Entitlement (\$):					

Setup Wage/Separation USF - Severance Pay page

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

Generating the ES-931 Report

Access the Print ES-931 page.

Once you have completed the necessary setup, run the Print Wage and Separation report (ES931). This prints an ES-931 Request for Wage and Separation Information report.

CHAPTER 16

(USF) Processing Personnel Action Requests

This chapter provides an overview of personnel action requests (PARs) and discusses how to perform common personnel actions.

Note. PeopleSoft delivers a database providing a sample setup of PAR data. All discussions, overviews, and examples in this book are based on the sample setup. Your agency may choose a similar setup or vary the processes to reflect its own system and operational procedures.

Understanding Personnel Action Requests

This section provides an overview of personnel action requests and discusses:

- Sample setup of pages used by employees and supervisors.
- Personnel actions and employee status.
- The importance of effective dates.
- Multiple actions with the same effective date.

Personnel Action Requests

An employee's history with an agency usually involves many job changes, such as promotions, leaves of absence, layoffs, retirement, pay rate changes, awards, and so on. To maintain both current records and a complete history of employee job data, your employees, supervisors, and human resources officials will regularly submit PARs for these changes in PeopleSoft Human Resources. (Before requesting personnel actions, verify that you've selected the Multiple Jobs Allowed check box on the Installation Table - Product Specific page.)

Note. The information you need to maintain your employees' career histories is the same type of information you enter to hire employees. Use the same pages for both. We discuss these pages in "(USF) Hiring Employees."

Requests for updates you want to make to employee job data begin in the Workforce Administration, Job Information menu. Depending on whether you are an employee requesting a change for yourself, a supervisor requesting a change on behalf of someone in your department, or a human resources official, choose Employee Request, Supervisor Request, or HR Request, where the system prompts you for an employee ID. Go to the Data Control page to begin the request for a new action. From here, go to other pages to enter additional information for the personnel action that you're requesting.

The differences between employee, supervisor, and human resources requests are the types of requests available and the workflow routing of the requests after being submitted. Human resources officials may request any of the actions.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Installing PeopleSoft HRMS,” Setting Up Implementation Defaults

Sample Setup of Pages Used by Employees and Supervisors

The following table lists a sample setup of the pages employees and supervisors can use to enter requests and where those requests can be routed.

Request Type	Page	Submitted By	Routed To
Accounting information	Compensation	Supervisors	Authorization
Agency transfer	Job	Supervisors	Authorization
Agency/sub-agency	Job	Supervisors	Authorization
Appointment/expiration data	Employment 1	Supervisors	Authorization
Awards	Award Data	Supervisors	Authorization
Benefits/retirement	Job	Supervisors	Authorization
Department reassignment	Job	Supervisors	Authorization
Departmental hierarchy (view only)	Job	Supervisors	Authorization
Draft status	Personal Data	Employees/supervisors	HR department
Earnings	Compensation	Supervisors	Authorization
Employee type	Position	Supervisors	Authorization
Expected pay (view only)	Compensation	Supervisors	Authorization
FLSA status	Position	Supervisors	Authorization
Holiday schedule	Position	Supervisors	Authorization
Job code #	Job	Supervisors	Authorization

Request Type	Page	Submitted By	Routed To
LEO position	Position	Supervisors	Authorization
Locality/LEO adjustment	Compensation	Supervisors	Authorization
Location	Job	Supervisors	Authorization
Marital status	Personal Data	Employees/supervisors	HR department
Medicare entitlement date	Personal Data	Employees/supervisors	Authorization
Military status	Personal Data	Employees/supervisors	Authorization
Name/address/birth/phone	Personal Data	Employees/supervisors	Authorization
Nonpay data	Employment 2	Supervisors	Authorization
Other pay data	Compensation	Supervisors	Authorization
PAR remarks	Par Remarks	Supervisors	Authorization
Pay group/frequency	Position	Supervisors	Authorization
Pay plan/table/grade/step	Compensation	Supervisors	Authorization
Permanent/RIF/tenure	Employment 2	Supervisors	Authorization
POI	Position	Supervisors	Authorization
Position #	Job	Supervisors	Authorization
Probation dates	Employment 2	Supervisors	Authorization
Quoted pay data	Compensation	Supervisors	Authorization
Reports to position	Employment 2	Supervisors	Authorization
Retained grade	Employment 2	Supervisors	Authorization

Request Type	Page	Submitted By	Routed To
Review date	Employment 1	Supervisors	Authorization
Security info	Employment 2	Supervisors	Authorization
Service computation dates	Employment 1	Supervisors	Authorization
Service conversion dates	Employment 1	Supervisors	Authorization
SF-50/SF-52	Data Control	Supervisors	Prints reports
SF-113 ceiling	Position	Supervisors	Authorization
Shift details	Position	Supervisors	Authorization
Tax location	Job	Supervisors	Authorization
Tracking (job) data	Tracking Data	Supervisors	Authorization
Union information	Employment 2	Supervisors	Authorization
Veteran's data	Personal Data	Employees/supervisors	Authorization
Within-grade-increase data	Employment 1	Supervisors	Authorization
Work schedule	Position	Supervisors	Authorization

Personnel Actions and Employee Status

When you request a personnel action to make changes to employee job data, the employee status often changes. For example, when you select *Retirement*, the employee status changes from *Active* to *Retired*. Similarly, if you terminate an employee due to death, the employee status changes from *Active* to *Deceased*. The employee status is based on either the personnel action, or in a few cases, the reason for the action, such as death. The system sets employee status as follows.

When you select the personnel action	The system sets the employee status to
Hire Applicant hire Rehire Concurrent appointment Detail assignment End of detail Terminate detail assignment Return from LWOP Return from disability (LWP) Recall from suspension/furlough Intl assignment	<i>Active</i>
Leave with pay Short-term disability Long-term disability	<i>Leave of Absence</i>
Paid leave of absence Short-term disability with pay Long-term disability with pay	<i>Leave with Pay</i>
Retirement with pay	<i>Retired with Pay</i>
Terminated with benefits Terminated with pay	<i>Terminated with Pay</i>
Furlough Suspension	<i>Suspended</i>
Retirement	<i>Retired</i>
Intl assignment completion Termination	<i>Terminated</i>

When you select the personnel action	The system sets the employee status to
Termination (reason of death)	<i>Deceased</i>
Pay rate change Change to lower grade Data change Earnings distribution change Job reclassification Position change Probation Completion of probation Promotion Extension of NTE date Award-monetary Award-nonmonetary Bonus Reassignment/conversion Family benefits change	The system sets the employee status to the same status that's in the previous data row. If no previous data row exists, the system sets the status to <i>Active</i> .

When an employee status is set to *Active*, *Leave with Pay*, *Retired with Pay*, or *Terminated with Pay*, the system triggers payroll processing in PeopleSoft Payroll and PeopleSoft Payroll Interface.

If your agency uses PeopleSoft Payroll for North America, payroll paysheets aren't generated for employees whose status is *Retired* or *Terminated*. You may need to pay employees for a partial pay period or for a time after they leave the agency, however, so use either the personnel action *Retired with Pay* or *Terminated with Pay* to ensure that this occurs.

A change in employee status can affect PeopleSoft Human Resources Manage Base Benefits, PeopleSoft Benefit Administration, and PeopleSoft Payroll processing. Specifically for benefits, you may need to suspend coverage during a leave of absence or a suspension. In addition, a promotion or a job reclassification might affect an employee's benefit coverage.

Changes in an employee's status can also impact pension administration.

Importance of Effective Dates

You usually update employee job data in PeopleSoft Human Resources for U.S. Federal Government by adding effective-dated data rows to the employee records. Insert a new row on the Data Control page. When you do this, the system copies the contents of the previous row into the new row so that you don't have to retype the information that stays the same. (So before you insert a new row, ensure that you're on the data row that you want to copy.) The only new information you see is the effective date, which defaults to the system date, usually today's date, which you can change.

If you want to work on the Employment 1 or 2 pages, for example, first insert a new data row on the Data Control page, and then move to the appropriate Employment page to enter changes.

Effective dates enable you to maintain a complete chronological history of all your data and tables, whether you changed them two years ago or want them to go into effect in two months. With all this information at your fingertips, you can roll back your system to a particular time to analyze position data or employee records. Or you can roll forward and set up tables and data before they take effect.

The system also uses effective dates to compare pages and tables to ensure that the prompt tables list only the data that is valid as of the effective date of the page where you are working. For example, let's say you create a new department code with an effective date of May 1, 1997. If, on the Job Data pages, you enter a new data row for an employee or update an existing row that has an effective date *before* May 1, 1997, then when you select a department, you won't see the new code as a valid choice because it isn't in effect yet.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “(USF) Setting Up Human Resources Management Tables”

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “(USF) Setting Up the Work-in-Progress Management System”

Multiple Actions With the Same Effective Date

On occasion, you may need to enter more than one personnel action that takes effect on the same day. Entering two actions with the same effective date is particularly common when you need to track annual pay adjustments and career promotions that take effect on the same day. Use effective sequence numbers to combine multiple actions and specify which one to process first. On the Data Control page, enter an actual effective date and assign the action, and the system automatically assigns a transaction number/sequence for each personnel action: The first on that date as *1/1* and the second as *2/1*.

For example, an employee received a pay rate change and a promotion on the same day. As a result of this pay rate change, that employee's salary was raised by about 2.5 percent. A promotion from a GS-07 position to a GS-09 position produced an additional 7.9 percent increase in salary.

Note. The sequence number for a request is always *1* unless you are canceling or correcting a request that has already been completed and processed. In this case, the system would assign a sequence number of *2* for that action.

To enter multiple personnel actions with the same effective date:

1. Open the Data Control page for the employee whose data you're requesting to update.
2. For the first personnel action, insert a new data row.
3. Enter a new actual effective date.
Because it is the first action processed for this actual effective date, the Transaction#/Seq # field is *1/1*.
4. Enter any other information required to implement the action, either here or in other pages in the component.
5. Change the PAR Status on the Data Control page to *Requested* so that you can continue on to enter the next action.
6. To enter the second action, such as *Promoted*, insert another data row.

7. Enter the same actual effective date as the first action.

The system enters a Transaction#/Seq of 2/1.

8. Continue the same steps required for the first action, entering a new action each time.

Employee Data Security Considerations

When you reassign employees from one department to another using a data row containing an effective-date sequence number, the system currently allows users with security access to the old or new department to have access to all the employee data. PeopleSoft delivers the system this way because implementing security in system views specific to the function Max (effseq) on PS_JOB would adversely affect online response time.

For example, when you reassign an employee from department one to department two and give the employee a promotion on the same day, because an effective-date sequence number is in the reassignment data row, users with access to either department one or two have access to the employee data.

If you want to modify the system to prevent this, change the security views for the PeopleSoft applications you use. Bear in mind, however, that making the change affects system performance.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Administering PeopleSoft Security”

Performing Common Personnel Actions

This section discusses how to:

- Enter promotional information.
- Request departmental reassignments.
- Request a leave of absence.
- Enter terminations and retirement requests.
- Request a supplemental or correction individual retirement record.
- Request terminations due to death.
- Request to rehire an employee.
- Grant performance awards.

Entering Promotional Information

When an employee changes pay grades or moves to a new job, salary changes are typically part of that personnel action.

To enter promotional information:

1. Insert a new data row on the Supervisor Request - Data Control page, and complete all fields.
2. When you are ready to submit the request, ensure that the PAR Status is *REQ*.

The workflow system then picks up this information and routes it through the process. After that, you can still change, withdraw, or deny the information up until the point that the action has been finalized and has a status of *Processed*. To correct or cancel the request after it's been completed and has a status of *HR Processed*, go to the Cancellation or Correction pages.

The information you change on the Data Control page and other pages varies according to the data for the former job and the new job. You will most likely select a new job code or a new position number by moving to the Job page. But all of the other entries on this page could also conceivably change in the event of a promotion.

Again, the information you change on the Job page may vary, but you will most likely select a new pay plan, table, grade, or step and enter (or generate) a new base pay.

3. Once you've completed all the changes caused by the promotion, if necessary, move to other pages to enter relevant information.

For example, move to the Personal Data page to enter new business phone numbers. Or move to the Position page to change the pay group or employee type, or to enter other relevant position details.

4. Change the position as necessary on the Supervisor Request - Job page.
5. Select a pay rate determinant on the Supervisor Request - Compensation page.
6. Set the options in the Within-Grade Increase Data group box on the Supervisor Request - Employment 1 page as follows:

Actions	Impact
Promotion (nature of action 702) WIGI (NOA 893) GM WIGI (NOA 891)	Sets the WIGI status to <i>waiting</i> . Sets the WIGI due date to the pay begin date, which is the first pay begin date after the employee has satisfied his or her next increase waiting period. Sets the LEI date and last increase date to the effective date of the action.
Quality step increase (QSI) (NOA 892)	Sets the WIGI status to <i>waiting</i> . Sets the WIGI due date to the pay begin date, which is the first pay begin date after the employee has satisfied his or her next increase waiting period. The WIGI due date is based on the last equivalent increase date, not the effective date of the action. Sets the last increase date to the effective date of the action. (Has no effect on the LEI Date.)

Actions	Impact
Change to lower grade (NOA 713)	Issues a warning message "Warning -- Change to Lower Grade Personnel Action may have an impact on WGI Due Date -- Adjust accordingly." Always review current or future-dated records and make manual adjustments that may be required for any change to lower grade action.
Temporary promotion (NOA 703)	Sets the WGI status to <i>NA</i>. Sets the WGI due date to <i>Blank</i>.

Requesting Departmental Reassignments

The description given here is for reassigning employees among departments. Agency-to-agency transfers are processed as hires and terminations.

To enter a reassignment request when a person is assigned to a new department without changing job codes:

1. Use the Data Control page to enter reassignment requests.
Reassignments usually imply that there is no change in pay grade or compensation.
2. If this action is to occur on the same day as another action, insert an Action# in the Action#/Sequence field.
3. Enter the Action of *Reassignment/Conversion*.
4. Enter the Reason Code, such as *Employee Request* or *Manager Request*.
5. Complete all other necessary changes, such as NOA Code and Authority (1) and (2).
6. Move to the Job page to enter additional changes for the employee being reassigned.

Change the position number, job code, agency, and any other details that will change with the employee reassignment. When you select a new department for the employee, the system automatically enters a new location and tax location if you've associated a location with the department in the Department table.

7. Move to other pages to enter any other employment or job information applicable to the reassignment.

For example, you may need to go to the Personal Data page to enter a new phone number. On the Personal Data page, click the Personal Phone Numbers button, and on the Personal Phone Numbers page, enter a new business phone number. On Employment 2, change the supervisor ID to the manager of the new department. Move to other pages, such as the Position page to change the pay group, employee type, or other relevant position details.

Security Considerations

PeopleSoft Human Resources enables users to assign employees into departments that they can't access for updates. If you want to prevent an user from reassigning an employee into a department for which they don't have access, PeopleSoft Human Resources contains a view (DEPT_TBL_ACCESS) that displays only those department IDs that users can access based on their user security profiles.

If you choose to use this view, you must create a class of users who have access to all departments so that they can perform reassignments.

See Also

Chapter 6, “Hiring Your Workforce,” page 63

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Administering PeopleSoft Security”

Requesting Leave of Absence

At some point in their careers, many employees take leaves of absence. For example, when an employee or an employee’s wife has a baby, the new parent may request a maternity or paternity leave.

To enter a leave of absence:

1. Access the Data Control page to submit a request for the employee who is temporarily leaving the agency.
2. Access the Non Pay Data page to enter leave of absence data for an employee.

In the Last Date Worked field, enter the last date the employee worked. When you process the PAR to return the employee to pay status, you must update the other fields (SCD Hours, Probation Hours, and Career Tenure Hours), as appropriate.

3. When an employee returned from leave, return to the Data Control page to change that employee’s status to *active*.
 - a. In the Action field, select *RFL* (return from leave without pay).
 - b. In the Reason Code field, select *RFL* (return from leave).
 - c. In the PAR Status field, select *Requested* or leave it as *Initiated* in case the return date changes for any reason.
 - d. Move to any other pages to make needed changes.

See Also

PeopleTools 8.42 PeopleBook: PeopleSoft Process Scheduler

Entering Terminations and Retirement Requests

When employees leave the agency permanently, you render their records and their statuses inactive by registering them as *Terminated* or *Retired*. The processes for entering terminations and retirements are almost identical; the primary difference is the action you select on the Data Control page.

To enter termination and retirement requests:

1. Request a termination for an employee who has left the agency using the Data Control page.

The Actual Effective Date field defaults to the system date, usually today’s date, which you can change.

Normally, the system uses the effective date to represent the *beginning* of an action; however, when an employee terminates or retires, the system treats the effective date you enter as the close of business of the day of the termination.

For example, if an employee’s last day of employment is September 1, the effective date is September 1 because the termination is effective at the close of business that day.

2. In the Action field, select one of the following: *Termination*, *Terminated with Pay*, *Terminated with Benefits*, or *Retirement*. Then select a reason code for the departure, if applicable.

Depending on the action you selected, the system changes the employee status from *Active* to *Terminated*, *Terminated with Benefits or Pay*, or *Retired*.

3. If the employee is suitable for rehire, save this page.

When you request a termination or retirement, the system generates an individual retirement record (IRR) control record for this employee.

Note. The IRR process is used by agencies using PeopleSoft Payroll. Payroll detail earnings and deductions for the fiscal history are used in the IRR process.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Using PeopleSoft Workflow,” Using Workflow to Terminate Employees

PeopleSoft 8.8 Payroll for North America PeopleBook, “(USF) Generating IRR and ROST Reports,” Understanding the IRR Process

Requesting a Supplemental or Correction Individual Retirement Record

After you process an employee’s IRR, you may find that you need to supplement or make corrections to that IRR. This requires that you create another PAR using the Workforce Administration, Job Information, Supplement to IRR or Correct IRR Supplement menu.

When you create the new PAR, the system creates an IRR control record with an IRR type of *C* (correction) or *S* (supplemental).

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “(USF) Generating IRR and ROST Reports,” Generating Supplemental or Correction IRRs

Requesting Terminations Due to Death

To request termination due to death:

1. Open the Data Control page for the deceased employee.
2. In the Action field, indicate that the employee is *Terminated*.
3. In the Reason Code field, select *Death* as the reason for termination.

The system automatically changes the Employee Status field from *Active* to *Deceased*.

Requesting to Rehire an Employee

When you request to hire an employee who worked for your agency in the past, enter a *Rehire* action. Information on a rehired employee is already in PeopleSoft Human Resources unless the employee data was deleted or archived. If employee records aren’t in the system, follow the new hire process described in “Hiring Your Workforce.”

You can rehire only employees whose employee status is *Terminated*, *Terminated with Pay*, *Terminated with Benefits*, *Retired*, or *Retired with Pay*. If you rehire an employee whose records already exist in the system, you may want to ensure that the personal, employment, and job data for that person is current.

If you want to rehire an employee whose previous job was in a department (organizational entity) for which you don't have security access, give at least one user performing rehires security access to all departments.

To request to rehire an employee into the system:

1. Open the Data Control page for the employee and request a rehire.
2. Move to the other employee data pages to enter additional information.

Granting Performance Awards

Recognizing and rewarding employee performance is a critical component of attracting and keeping top talent. PeopleSoft Human Resources handles the complexity of this human resource area by making it easy to establish, record, track, and grant employee awards and bonuses.

Begin the process to grant an award by submitting a request to issue a bonus or award. The data is automatically sent through the approval process, tracked, approved, recorded, and issued to the employee.

To issue an award:

1. Set up the Award Action Data page to define monetary and nonmonetary award types.
2. Request an award or bonus for your employee on the Data Control page.
Submit your request the same as you would for other personnel actions.
3. Define the award setup using the Supervisor Request - Data Control page.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies, "Setting Up Competencies and Accomplishments"

CHAPTER 17

(USF) Processing Automatic Actions for Probation, Tenure, and Within-Grade Increases

This chapter provides an overview of processing automatic actions and discusses how to:

- Perform automatic actions.
- Administer probation termination automatic actions.
- Administer tenure conversion automatic actions.
- Administer within-grade increases (WGIs).

Understanding Automatic Action Processing

This section lists prerequisites and provides an overview of processing automatic actions.

Prerequisites

For the Automatic Actions process to work as described, you must first activate workflow and set up supervisors in the workflow process. Consult your system administrator for information.

Before you can administer automatic actions for your employees, you must have already entered them into the system using the Hire Employee, Concurrent Hire, Add Non-Employee, or Hire components in Workforce Administration.

You should designate one or more employees, perhaps from your human resources or payroll office, to administer the Automatic Actions processes. As delivered, the system sends supervisor notifications to the employee's supervisor's worklist based on WGI, tenure, and probation information already in your system. This information, most of which you entered during the hire process, initiates the automatic action processes. Run the Automatic Action processes regularly, as determined by your organization's needs. If necessary, manually change employee records to process special cases.

Before implementing Automatic Actions, decide how often your agency should run each process. For example, within-grade increases generally take effect on the first day of a pay period, so you might choose to process step increases only once per pay period. On the other hand, if supervisors review notices every Thursday morning, you should run 60-day notification processes weekly. Some agencies run the notification processes nightly to accommodate multiple supervisors and to allow for maximum time to verify upcoming employee record changes.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Using PeopleSoft Workflow”

Chapter 6, “Hiring Your Workforce,” Adding Nonemployees, page 125

Chapter 7, “(USF) Hiring Employees,” Using the Personnel Action Request (PAR) Process to Hire Employees, page 138

Processing Automatic Actions

Your agency’s human resources personnel have many tasks to oversee: recruiting new employees, making hiring decisions, administering reviews, and tracking changes in employees’ personal data, among others. Unfortunately, much of their time can be spent processing routine, tedious data. PeopleSoft HRMS USF functionality automates some of these routine tasks, leaving your professionals free to spend time on other projects that require their professional insight and skills.

The PeopleSoft Human Resources Administer Workforce business process offers an Automatic Actions process to administer these routine tasks:

- Probation termination.
- Tenure conversion.
- Within-grade increases (WGIs).

If you activate workflow, PeopleSoft Human Resources alerts you of upcoming waiting period terminations or step increases and then automatically updates employee records without user intervention. After you assign supervisors to review automatic action notices, you won’t forget these important dates.

The procedure is identical for all three automatic actions:

1. Run a process to identify employees with upcoming probation terminations, tenure conversions, or within-grade increases in the next 60 days.

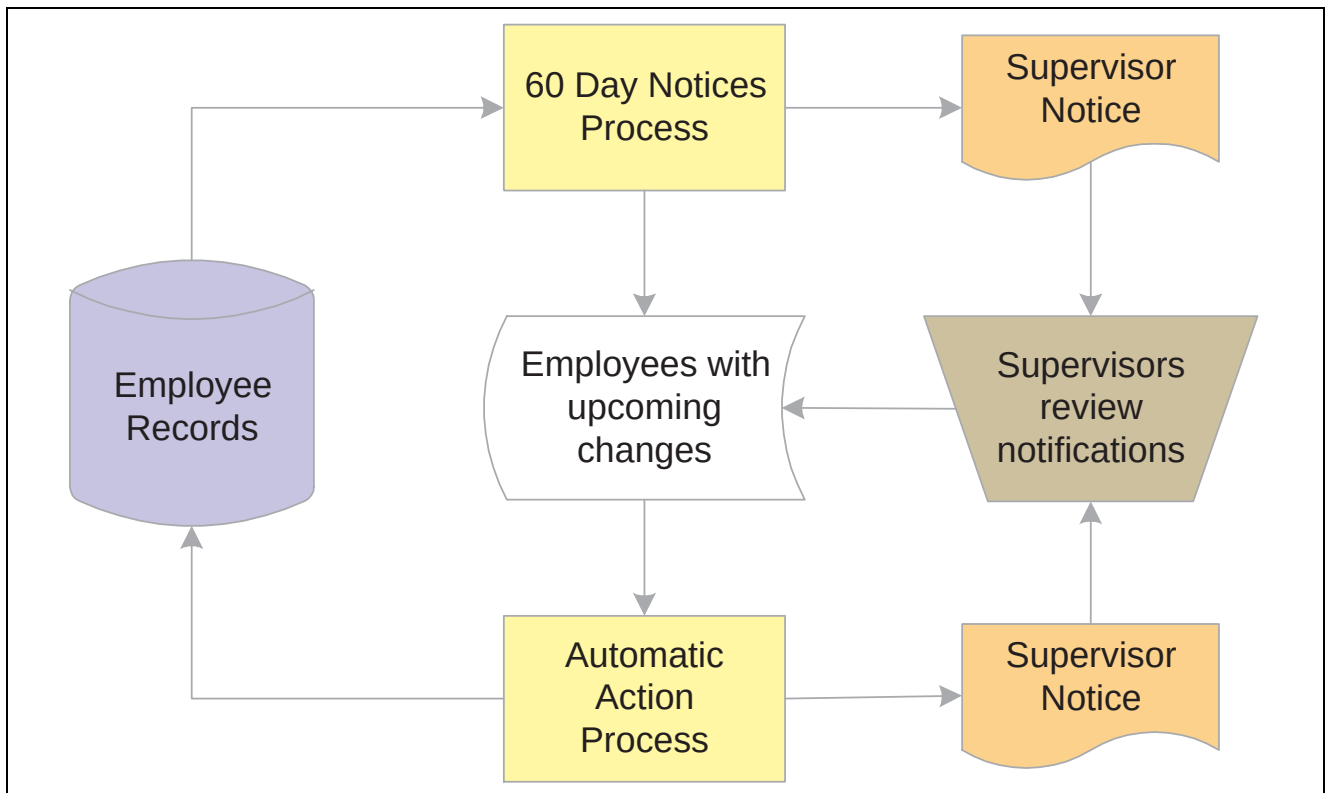
The system creates online notifications of upcoming changes and sends them to the worklist of designated supervisors.

2. Review online notifications and make any necessary changes to employee records.

Unless you change status or date fields in the employee’s records to stop the update from occurring, the respective process updates the employee’s records.

3. Run a process on the specified date to change employee records.

This process also creates notices and sends them to supervisor worklists.



Processing automatic actions

Performing Automatic Actions

This section provides an overview of the menus and pages used for each automatic action process and discusses how to:

- Process automatic actions.
- Run the Load Within Grade Increases process.

Understanding the Menus and Pages Used for Each Automatic Action Process

The following table provides an overview of the menus and pages used for each automatic action process. However, this table does not include manual setup and verification. Run all of these processes from the Workforce Administration, Collective Processes menu.

Step	Function	Navigation	In PeopleSoft Process Scheduler, Select	Process Type and Name
1	Identify employees, create notices, and send notices to supervisor worklists.	Process Automated Actions USF	60 Day Probation Term Notices	Application Engine FGHR003A
			<i>Or</i> 60 Day Tenure Notices	Application Engine FGHR004A
			<i>Or</i> 60 Day WGI Notices	Application Engine FGHR002A
2	Update employee records and send notices to supervisor worklists.	Process Automated Actions USF	Process Probation Terminations	Application Engine FGHR003B
			<i>Or</i> Process Tenure Conversions	Application Engine FGHR004B
		<i>Or</i> Process WGI Auto Action USF	Load Within Grade Increases	Application Engine FGHR002B

Pages Used to Perform Automatic Actions

Page Name	Object Name	Navigation	Usage
Automatic Actions	RUNCTL_AUTO_ACTNS	Workforce Administration, Collective Processes, Process Automated Actions USF	Specify automatic action run control parameters for the probation termination and tenure conversion processes.
WGI Action	RUN_FGHR002B	Workforce Administration, Collective Processes, Process WGI Auto Action USF	Specify automatic action run control parameters for processing WGIs.
60 Day Prob Term (60 day probation term)	GVT_PROB_END_NOTE	Workforce Administration, Collective Processes, Probat Term-Supv Notif USF	View impending probationary period termination notifications online.
60 Day Ten Conv (60 day tenure conversion)	GVT_TEN_END_NOTICE	Workforce Administration, Collective Processes, Tenure Conversion Notice USF	View 60-day tenure notifications online.
WGI Notice (within-grade increase notice)	GVT_WGI_NOTICE	Workforce Administration, Collective Processes, Within Grade Incr Notice USF	View impending within-grade increases notifications online.

Processing Automatic Actions

Access the Automatic Actions page.

Company	Enter the company for which you would like to identify employees and create notifications.
As Of Date	The as of date is set by default to the system date. The process identifies all rows with a probation date within 60 days in the future from this date.
Process Request	Click to run this request. PeopleSoft Process Scheduler runs the Automatic Actions process at user-defined intervals.

See Also

PeopleTools 8.42 PeopleBook: PeopleSoft Process Scheduler

Running the Load Within Grade Increases Process

Access the WGI Action page.

Company	Enter the company for which you would like to process within-grade increases.
As Of Pay Period End Date	This field is set by default to the system date, but you must change it to a valid pay period end date for the pay calendar you have created. The system processes within-grade increases for employees with a WGI due date before this date, usually the begin date for the same pay period. However, the system also processes WGIs due before this pay period-retroactive WGIs.

Administering Probation Termination Automatic Actions

When you first hire an employee, your agency usually imposes a probation period; most new regular federal employees have one-year probation periods. Supervisory or managerial employees and Senior Executive Service (SES) employees often have different probation periods, which you track separately.

The Probation Termination automatic action, like other automatic actions, identifies employees who will reach their probation termination date within 60 days. After you have activated workflow, the system sends messages to employee supervisors who are designated to process automatic actions. After the supervisors approve the probation termination, run the process to perform the actual changes to employee records, blanking out employee probation dates, indicating that they have met the probation period. Finally, you can send notices of completed probation periods to the designated supervisors' worklists.

This section discusses how to run the probation termination automatic action.

Running the Probation Termination Automatic Action

To run the probation termination automatic action:

1. Verify all of the data required for automatic probation termination processing.
 - a. Verify the employee's probation waiting period (Probation Date) and the position to which the employee reports (Reports To Position) on the Employment 2 page, accessed from the HR Request menu. If the employee has multiple data rows, verify only the current row.
 - b. Verify accumulated non-pay hours that affect the employee's probation termination date on the Non Pay Data page.
2. Run the 60 Day Probation Term Notices process from the Automatic Actions page.

During this process, the system performs the following functions:

- Identifies employees who have a probation termination within the next 60 days, and then creates supervisor notifications. After the notices are created, the supervisor has until the probation termination date to request an extension of the probation period. The system processes the probation termination if the supervisor doesn't respond in time.
 - Adds a row to the automatic action control table (GVT_AUTO_ACTN), which records the employee ID, employee record number, automatic action type, and automatic action date. The system differentiates among the three probation termination types: standard, supervisor, and SES. This table also indicates whether the notification was sent to the specified worklist, whether the action was processed, and whether notification of the processed action was sent to the specified worklist.
3. Run the Process Probation Terminations process from the Automatic Actions page.

The automatic action process updates the records of all employees previously identified in the 60 Day Probation Term Notices process unless the supervisor has extended their probation periods. The probation termination automatic action performs the following functions on the probation termination date:

- Edits the applicable row in the automatic action control table (GVT_AUTO_ACTN) to indicate that the probation termination was processed. This row was created during the 60 -Day Probation Term Notices process.
- Clears the probation date on the employee's current Employment 2 page.
- Creates a supervisor notice indicating that the probation termination was processed.

4. View notices of upcoming probation terminations on the 60 Day Prob Term page.

Supervisors and human resources officials can view 60-day notifications online. After viewing these online messages of impending probationary period termination, they should verify that the employee will fulfill all of your agency's requirements by the specified date. To extend the probation period, the supervisor should request a personnel action to change the probation date on the employee's Employment 2 page. If the employee's probation date isn't changed, the probation termination will occur on the date indicated.

See Also

Chapter 7, "(USF) Hiring Employees," Assigning Employees to Positions, page 176

Chapter 7, "(USF) Hiring Employees," Using the Personnel Action Request (PAR) Process to Hire Employees, page 138

Administering Tenure Conversion Automatic Actions

Most of your conditional and career-conditional new hires are subject to tenure conversion waiting periods. If you specify this period when you first hire the employee, the tenure conversion automatic action alerts you of upcoming tenure conversion dates and changes employee records to reflect the tenure conversion.

The Tenure Conversion automatic action, like other automatic actions, identifies employees who will reach their tenure conversion dates within 60 days. After you activate workflow, the system sends messages to the supervisors you have designated to process automatic actions. After the supervisors approve the tenure conversion, run the process to perform the actual changes to employee records—clearing tenure conversion dates and changing tenure types. Finally, you can send notices of tenure conversions to the designated supervisors' worklists.

This section discusses:

- Running the tenure conversion automatic action.
- Changes made to employee records during tenure conversion.

Running the Tenure Conversion Automatic Action

To run the tenure conversion automatic action:

1. Verify all of the data required for automatic tenure conversion processing processing.
 - a. Verify the employee's service conversion dates, tenure status, and the position to which the employee reports (Reports To Position) on the Employment 2 page, accessed from the HR Request menu.
 - b. Verify accumulated non-pay hours that may affect tenure conversion waiting periods on the Non Pay Data page.
2. Run the 60 Day Tenure Notices process from the Automatic Actions page.

During this process, the system:

- Identifies employees who will reach their tenure conversion date within 60 days, and then creates supervisor notifications. After the notices are created, the supervisor has until the tenure conversion date to request an extension of the waiting period. The system processes the tenure conversion if the supervisor doesn't respond.
 - Adds a row to the automatic action control table (GVT_AUTO_ACTN). This table records the Employee ID, Employee Record Number, automatic action type, and automatic action date. The system differentiates between the two types of tenure conversions, career and career-conditional. This row also indicates whether the notification was sent to the specified worklist, whether the action was processed, and whether notification of the processed action was sent to the specified worklist.
3. Run the Process Tenure Conversions process from the Automatic Actions page.
In this process, the system updates records of employees previously identified in the 60 Day Tenure Notices process, unless the supervisor extended the tenure conversion date. The tenure conversion automatic action performs the following functions on the tenure conversion date:
 - Edits the applicable row in the automatic action control table (GVT_AUTO_ACTN) to indicate that the tenure conversion was processed. This row was created during the 60-Day Tenure Notices process.
 - Inserts an employee data row with updated or deleted tenure conversion dates and changed tenure type.
 - Creates a supervisor notice indicating that the tenure conversion was processed.
 4. View notices of upcoming tenure conversions on the 60 Day Ten Conv page (60 day tenure conversion page).
Supervisors and Human Resources officials can view 60-day notifications online. After viewing online messages of impending tenure conversion, they should verify that the employee will fulfill all of your agency's requirements by the specified date. To extend the tenure conversion period, the supervisor should request a personnel action to change the date on the employee's Employment 1 page, as described previously. If they don't change the employee's tenure conversion date, the tenure conversion will occur on the date indicated.

See Also

Chapter 7, "(USF) Hiring Employees," Assigning Employees to Positions, page 176

Chapter 7, "(USF) Hiring Employees," Using the Personnel Action Request (PAR) Process to Hire Employees, page 138

Understanding Changes Made to Employee Records During Tenure Conversion

To understand the changes made to employee records during the Tenure Conversion process, let's look at an example of an employee's data rows.

Effective Date	NOA	Conv Begin Date	Career Conv Date	Career-Cond Conv Date	Tenure
01/01/99= old Career Conv Date	880 = Change in Tenure Status				Permanent
01/01/96= old Career-Cond Conv Date	880 = Change in Tenure Status	01/01/96= current effective date	01/01/99= Conv Begin Date + 3 years		Conditional
01/01/94	101 = Career Conditional Appointment	01/01/94		01/01/96	None

As the table demonstrates, the system inserts a row with an effective date equivalent to the Career Conversion Date or Career-Conditional Conversion Date and a Nature of Action code 880.

For career-conditional conversions, the system performs the following actions on the new row:

- Blanks out the career-conditional conversion date.
- Changes the conversion begin date to the effective date of the current row.
- Inserts a career conversion date three years in the future. You can change this date.
- Changes the tenure type from *None* to *Conditional*.

For career conversions, the system performs these actions on the new row:

- Blanks out the career conversion date.
- Blanks out the conversion begin date.
- Changes the tenure type from *Conditional* to *Permanent*.

Administering Within-Grade Increases (WGIs)

Keeping track of within-grade increases for all of your agency's employees can be a time-consuming, labor-intensive process. Using workflow, which you activate and set up, PeopleSoft Human Resources automates the entire process, from identifying upcoming step increases to updating employee records after the increase has occurred. All employees who meet minimum performance standards will receive the proper step increase and concurrent pay raise at the end of the step waiting period.

This section provides an overview of 60 day WGI notices and of the load within grade increases process and discusses:

- Running the WGI automatic action.
- Entering data that affects WGI automatic actions.

Understanding the 60 Day WGI Notices

The system identifies and differentiates among employees who have a WGI Status of *Waiting* or *Approved* and a WGI Due Date up to 60 days in the future, but do not meet all automatic WGI criteria. Employees are classified into four different WGI automatic action types.

Automatic Action Type	Explanation
Within Grade Increase	These employees will receive an automatic WGI within 60 days.
Manual WGI	You need to process these employees' WGIs manually. For example, employees with intermittent or seasonal work schedules require manual WGI processing.
Retroactive WGI	These employees have a WGI Status of <i>Waiting</i> , but were due a WGI in a previous pay period.
WGI W/O Min. Performance	These employees have an Overall Review Rating below <i>Satisfactory</i> or do not have a review within the last fifteen months.

Different supervisor notifications are sent for each of these types. However, the system processes within-grade increases automatically for only the first and third types listed previously, Within Grade Increase and Retroactive WGI.

Understanding the Load Within Grade Increases Process

To understand the within-grade increase automatic action, consider what happens to an employee with this current row:

Effective Date	NOA	Step	WGI Due Date	WGI Status	Last Increase Date	LEI Date
01/01/01	Any	1	05/18/01	Waiting		

In March, the notification process identified this employee's upcoming WGI, after which you sent a notification to the supervisor. The supervisor approved the increase and didn't need to change any data.

On May 18, 2001, the WGI due date, the system processes this employee's within-grade increase. It changes the WGI Status in the old row and inserts a new row as follows:

Effective Date	NOA	Step	WGI Due Date	WGI Status	Last Increase Date	LEI Date
05/18/01= old WGI due date	893 = WGI	2	Pay period begin date after Step 2 waiting period	Waiting	05/18/01= old WGI due date	05/18/01= old WGI due date
01/01/01	Any	1	05/18/01	Created		

As you can see, the system performs six actions during the within-grade increase process:

- Changes the WGI Status to *Created* in the row that was current when the WGI process occurred. If the employee has multiple rows with the same WGI due date, the system changes the status of all the rows to *Created*. Only the system enters a status of *Created*.
- Inserts a new row with Nature of Action Code 893 and Effective Date equal to the old WGI Due Date.
- Increments the Step by one in the new row, and updates step-dependent pay information.
- Calculates the WGI Due Date for the new row. This date corresponds to the beginning of the pay period following the waiting period for the new step.
- Sets the WGI Status on the new row to *Waiting*.
- Sets both the Last Increase Date and LEI Date on the new row to the old WGI Due Date.

WGI increases take effect only at the beginning of a pay period. If the WGI due date is the beginning of a pay period, the pay increase occurs on that date—the employee receives the increased pay for the entire period. However, if the WGI due date falls between the beginning and ending dates of a pay period, the pay increase takes effect at the beginning of the following pay period.

In addition to changing employee records, the system edits the applicable row in the Automatic Action Control table (GVT_AUTO_ACTN) to indicate that the WGI was processed. It also creates a notice indicating that the WGI was processed.

Running the WGI Automatic Action

To process automatic within-grade increases:

1. Verify all of the data required for automatic WGI processing.

To enable the system to run WGI automatic actions, you must first set up required position and employee data. You may have already entered the necessary information when hiring the employee. Now, verify information throughout your PeopleSoft Human Resources system, at both the table level and the employee level. If the employee has multiple data rows, you only need to verify the current row. All of the following conditions must be met for the system to process an automatic within-grade increase:

- a. Selected the Pay Plan is Eligible for Auto Within Grade Increase check box on the Pay Plan Table page.
- b. Defined pay calendars for the current year plus the next three years on the Pay Calendar Table page.
- c. Ensured each step has a Next Step Increment value in the Weeks column on the Salary Step Table page.

- d. Set the Overall Review Rating to *Satisfactory* or better within last 15 months on the Employee Appraisal 1 page.
- e. Selected a Work Schedule of *Full Time*, *Baylor Plan*, or *Part Time* on the Position page.
- f. Set WGI Status to *Waiting* or *Approved* on the Employment 1 page.
- g. Ensured that the Reports To Position field contains a valid entry on the Employment 2 page.
- h. Verified that the Step isn't the highest in grade on the Compensation Data page.

Note. If you are using the Manage Positions business process, the Report To Position field on the Employment 2 page is unavailable for data entry. To edit the field, select the Position Override check box on the Position Data page and change the position this employee reports to. You can also identify the Reports To Position on the Position Data – Description page. To do this, select Organizational Development, Position Management, Maintain Positions/Budgets, Update Position Info.

2. Run the 60 Day WGI Notices process from the Automatic Actions page.

This process identifies employees with a WGI Due Date within the next 60 days and a WGI Status of *Waiting* or *Approved*. The system:

- Adds a row to the automatic action control table (GVT_AUTO_ACTN). This table records the Employee ID, Employee Record Number, automatic action type, and automatic action date. This table also indicates whether the notification was sent to the specified worklist, whether the action was processed, and whether notification of the processed action was sent to the specified worklist.
- Identifies employees who will receive a within-grade increase within 60 days and creates supervisor notifications. After the notices are created, the supervisor has until the WGI due date to deny or postpone the increase. If the supervisor doesn't respond, the system processes the step increase. To prevent the automatic within-grade increase from occurring, the supervisor must change the WGI Status to *Denied*, *Postponed*, or *N/A* on the current row and insert a new row with the new WGI Due Date and WGI Status of *Waiting* or *Approved*. The system also creates notices for employees who have a condition preventing automatic WGI processing.
- Changes the WGI Status on the employees' current Employment 1 pages to *Approved*, if the employees meet all of the WGI criteria.
- Sends upcoming WGI notices to supervisor worklists.

3. Run the Load Within Grade Increases process from the WGI Action page.

In this process, the system updates records of employees previously identified in the 60-Day WGI Notices process, unless you have denied or postponed their increases.

4. View notices of upcoming WGIs on the WGI Notice page.

After viewing these online messages of impending WGI due dates, verify that the employee will fulfill all of your agency's requirements by the specified date. To prevent the WGI from occurring, you must change the employee's WGI Status to *Denied*, *Postponed*, or *N/A* on the current Employment 1 page. Also, insert a new row with an updated WGI Due Date and WGI Status of *Waiting*. You can also view notices for employees who do not receive automatic WGIs or for whom you must manually process a WGI.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “(USF) Setting Up Additional U.S. Federal Payroll Functionality,” Establishing Pay Plans

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Using Pay Calendars,” Creating Pay and FLSA Calendars

Chapter 7, “(USF) Hiring Employees,” page 137

Entering Data That Affects WGI Automatic Actions

Because the automatic WGI process obtains information from many pages, be aware of entering information that might affect some of the data the system uses.

- Creating a PAR for a Change to a Lower Grade. When you create a PAR with Nature of Action code 713, the system updates the WGI due date to reflect the change. However, the change may affect the WGI due date and status in many ways. You need to verify that the information entered is correct for your specific circumstances. To remind you, the system displays a warning message.
- Changing the WGI Due Date. When you change the WGI due date, the system checks that the date you entered is the beginning of a pay period. If it isn't, it issues a warning message.
- Based on the WGI due date you entered, the system suggests the beginning of the pay period in which your date falls and the beginning of the next pay period. You can enter one of these or keep your original date. If you decide to keep the date you've entered, the WGI process still identifies this employee as eligible for a step increase. However, if you enter a WGI due date in the middle of a pay period, the pay increase takes effect only at the beginning of the following pay period.
- Adding historical rows. When you insert a row with an effective date earlier than an automatic WGI that has already occurred, the system assigns a WGI Status of *Waiting*. You probably do not want the system to process this row in an automatic WGI and should change the WGI Status to *N/A*. Depending on the Nature of Action, you might need to check other information, for example Step, on this and subsequent pages.
- Inserting a row with an effective date equivalent to the current WGI Due Date. The system processes the WGI after all other actions with the same effective date. It increments the sequence number of the WGI row it adds.

CHAPTER 18

(USF) Managing Leave

This chapter provides an overview of leave administration and discusses how to:

- Administer automatic leave enrollment.
- Set up leave transfer programs.
- Administer leave donations.
- Administer leave recipients.
- View leave transfer data.
- Report on leave transfer programs.

Understanding Leave Administration

This section lists prerequisites and discusses:

- Automatic leave enrollment administration.
- Leave transfer management.

Prerequisites

Set up Earnings codes and Earnings Accrual Classes.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “Defining Earnings Codes and Earnings Programs”

Automatic Leave Enrollment Administration

Use automatic leave enrollment functionality to enroll an employee automatically in an earnings accrual class with personnel action request (PAR) activity or approval to participate in a leave program. The system automatically populates the employee’s leave enrollment record with default enrollment values based on the leave class rules you set up. You can manually override the defaults.

Here are the steps in administering automatic leave enrollment:

1. Set up the Leave Class Rules template (one-time setup).
2. Set up Leave Class Rule criteria (one-time setup).
3. Process PAR activity or approval to participate in a leave program.

4. Run the Auto Leave Enrollment process.
5. Review the results of the Auto Leave Enrollment process.
6. Adjust enrollments as necessary.

Leave Transfer Management

Each Federal Government agency may establish and administer procedures to permit the voluntary transfer of annual leave between Federal Government employees in a time of crisis. A crisis can be a personal medical emergency or a situation deemed as an emergency of the agency.

There are three types of programs in which employees may donate or receive annual leave hours. These programs have similar but slightly different eligibility or usage rules. Employees may participate in more than one program.

Voluntary Leave Transfer Program (VLTP)	Employees donate and receive annual leave hours directly from each other.
Emergency Leave Transfer Program (ELTP)	Employees donate and receive hours through an agency-managed emergency bank that has been created to deal with a specific emergency.
Leave Bank	Employees donate and receive hours through an agency-managed leave bank.

Administering Automatic Leave Enrollment

This section discusses how to:

- Set up the leave class rules template.
- Set up leave class rules criteria.
- Process automatic leave enrollment.
- Review automatic leave enrollment.
- Manually enter and adjust leave enrollment.

Pages Used to Administer Automatic Leave Enrollment

Page Name	Object Name	Navigation	Usage
Leave Class Rules Template	GVT_LVCLSRUL_TMPLT	Set Up HRMS, Product Related, Workforce Administration, Absence, Leave Class Rules Criteria USF	Rank five rules criteria for the purpose of breaking ties if an employee qualifies under more than one leave class rule.
Leave Class Rules	GVT_LV_CLS_RULES	Set Up HRMS, Product Related, Workforce Administration, Absence, Leave Class Rules USF	Define your organization's rules for enrolling or terminating an employee from an earnings (leave) accrual class.
Automatic Leave Enrollment	RUNCTL_FGASOFDT	Workforce Administration, Leave Administration USF, Manage Leave Information, Request Auto Leave Enrollment	Run the process that automatically enrolls employees in earnings accrual classes based on the PAR or leave program activity and the leave class rules.
Leave Class Auto Entry Audit	GVT_LVCLS_TRGR	Workforce Administration, Leave Administration USF, Manage Leave Information, Track Auto Leave Enrollment	Review the results of the Leave Class Auto Enrollment process.
Employee Accruals	GVT_ACCR_PLAN	Workforce Administration, Leave Administration USF, Manage Leave Information, Employee Accruals Enrollment	Adjust employee enrollment in earnings accrual classes if there is a reason to override the automatic enrollment. If your organization does not use the automatic leave enrollment process, use this page to enroll employees in accrual classes.

Setting Up the Leave Class Rules Template

Access the Leave Class Rules Template page.

Leave Class Rules Template

Ranking Instructions

Please select the criteria fields that will determine leave class enrollment defaults. For each criteria field, assign a rank in the order of relevance of that criteria. For example, if work schedule is the most important criteria then give it a ranking of 1.

The ranking will serve as a tiebreaker for the Leave Class Auto Enrollment Process

Customize Find View All  First ◀ 1-5 of 5 ▶ Last					
	*Leave Rule Criteria Field		*Rank		
1	ACTION 		1		
2	GVT_PAY_PLAN 		2		
3	ACTION_REASON 		3		
4	GVT_WORK_SCHED 		4		
5	GVT_NOA_CODE 		5		

Leave Class Rules Template page

Set up the Leave Class Rules template only once.

Leave Rule Criteria Field

Select the PAR criteria and rank them on this page. These criteria correspond to the PAR Criteria fields on the GVT Leave Class Rules page, where you select values for each criterion. The criteria that you select and rank are:

ACTION: action

ACTION_REASON: action/reason

GVT_NOA_CODE: nature of action code

GVT_PAY_PLAN: pay plan

GVT_TYPE_OF_APPT: type of appointment

GVT_WORK_SCHED: work schedule

Rank

Rank each criterion in order from 1 to 5, with 1 being the highest rank. The single rule where the employee transaction meets the highest-ranking criteria is the rule the system uses as a tiebreaker if an employee qualifies under more than one rule.

Example of Tie Breaking

The following example illustrates how the system uses ranking to resolve situations where the employee qualifies under two different Leave Class Criteria rules.

Rule 1 Definitions	Rule 2 Definitions
PAR Criteria: Action: HIR Work Schedule: Full-time Pay Plan: GS	PAR Criteria: Action: HIR Work Schedule: Full-time NOA code: 170
Default Enrollments: Annual Leave Sick Leave	Default Enrollments: Annual Leave Sick Leave Home Leave

The employee meets all criteria for both rules. The Action and Work Schedule criteria are the same in both rules.

- If pay plan is ranked higher than NOA code on the Leave Class Rules template, the system uses the first rule to enroll the employee in leave classes.
- If NOA code is ranked higher than pay plan on the Leave Class Rules template, the system uses the second rule to enroll the employee in leave classes.

Setting Up Leave Class Rule Criteria

Access the Leave Class Rules page.

Leave Class Rules

Leave Class Rule ID: FT2PT

Leave Class Rule Criteria Type: Non-Hire PAR actions

Rule Criteria and Default Enrollment

Find | View All First 1 of 1 Last

Effective Date: 01/01/1980

Status: Active

*Description: From FT to PT Schedule

Short Description: FT to PT

PAR Criteria

Action: DTA

Reason Code: STC

NOA Code:

Pay Plan:

Work Schedule: Part Time

Default Enrollments

Find First 1-6 of 6 Last

*Earnings Accrual Class	Elect	Terminate	
ANN240	☐	☒	+ -
ANN360	☐	☒	+ -
ANN720	☐	☒	+ -
ANNLPT	☒	☐	+ -
SICKFT	☐	☒	+ -

Leave Class Rules page

Note. You do not need to set up a Leave Class Rule for terminating employees. The PeopleSoft Payroll for North America Final Check Process requires that the employee stay enrolled to determine how much pay they are eligible for upon their separation. Once an employee has *Terminated* status, normal payroll calculations in PeopleSoft Payroll for North America no longer process that employee.

Leave Class Rule ID	Identify each leave class rule you create.
Leave Class Rule Criteria Type	Assign a type to each new rule when you first enter the page. This value determines which additional fields are available on the page. Values are: <i>Hire/Rehire:</i> for rules associated with hire or rehire actions. <i>Leave Program Status:</i> for rules associated with leave bank and transfer processing. <i>Non-Hire PAR actions:</i> for rules associated with PAR actions that are not hire or rehire.

The value you select in the Leave Class Rule Criteria Type field affects which group boxes appear on the page.

424

PeopleSoft Proprietary and Confidential

Leave Class Rule Criteria Type	Group Boxes
<i>Hire/Rehire or Non-Hire PAR actions</i>	PAR Criteria Default Enrollments
<i>Leave Program Status</i>	Leave Program Default Enrollments

PAR Criteria

Only the criteria you selected and ranked on the Leave Class template appear in this group box. Select a value for a criterion if you want to process leave enrollment based on a designated value for that criterion under this rule. The system processes enrollments based on the value of this field in the employee's PAR transaction.

Default Enrollments

Earnings Accrual Class	Select the earnings accrual classes that apply to this rule.
Elect	Select to enroll employees in the earnings accrual class by this rule's criteria.
Terminate	Select to terminate employees from the earnings accrual class by this rule's criteria.

Leave Program

Leave Program Type	If an employee has been approved as a recipient of one of the leave transfer programs, you can define which accruals to enroll or terminate. Select the type of leave transfer program <i>Bank</i> , <i>Emergency</i> , or <i>Voluntary</i> .

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, "(USF) Setting Up Additional U.S. Federal Payroll Functionality," Defining Earnings Accrual Classes

Chapter 18, "(USF) Managing Leave," Administering Leave Recipients, page 438

Processing Auto Leave Enrollment

After you set up the Leave Class Rules template and the Leave Class Rule Criteria, you process any hire, PAR transaction, or leave program approval as you normally would through the Workforce Administration, Job Information menu.

When you are ready to enroll employees in earnings accrual classes, access the Automatic Leave Enrollment page. *As Of Date* is the run parameter. The Leave Class Auto Enrollment process (FGHR036) compares the PAR transactions and leave program approval against the leave class rule criteria and enrolls employees in the appropriate earnings accrual classes. You can set this process to run automatically or on demand.

Reviewing Auto Leave Enrollment

Access the Leave Class Auto Entry Audit page.

Leave Class Auto Entry Audit

View by Status:

Pending

Purge Completed

	EmplID	Empl Rcd Nbr	Name	Effective Date	Leave Class Enrollment Trigger	Description	Leave Class Rule ID	Leave Class Criteria Type
1	FDG950			01/05/11	Pending			H
2	FDG951			01/05/11	Pending			H
3	FDG952			01/05/11	Pending			H
4	FDG955			01/05/11	Pending			H
5	FDG956			01/05/11	Pending			H
6	FDG957			01/05/11	Pending			H
7	FDG958			01/05/11	Pending			H

Leave Class Auto Entry Audit page

Note. Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

Use this page to view the outcome of each transaction that was processed by the Leave Class Auto Enrollment process.

View by Status

Select a value to sort the data by status (Leave Class Enrollment Trigger). Values are: *Completed*, *Error*, or *Pending*.

The system records employees on this table with the status of *Pending* as soon as a PAR action is completed or the employee is approved into a leave program.

The status changes to *Completed* when the auto enrollment process is complete.

Purge Completed

Click to delete all data rows with the status (Leave Class Enrollment Trigger) of *Completed*.

Manually Entering or Adjusting Leave Enrollment

Access the Employee Accruals page.

The screenshot shows the 'Employee Accruals' page for employee Jones, Rebekah (EmplID: K0G001, Empl Rcd#: 0). The 'Accrual Plan' section shows the '*Earnings Accrual Class' as 'ALFT' (Annual Leave -- Full Time). The 'Accrual Election' section shows the 'Leave Type' as 'Annual', 'Election' as 'Elect' (selected), 'Waive', and 'Terminate' (unselected). The '*Elect Date' is '11/19/2002'. The '*Effective Date' is also '11/19/2002'. The 'Alternate Work Schedule' is set to 'None'. The 'Grandfathered Carryover' field is empty. The 'Short Name' field is also empty.

Employee Accruals page

Accrual Plan

Earnings Accrual Class

Select an earnings accruals class. The drop-down list displays the classes you created on the Earnings Accruals Class table.

Accrual Election

Leave Type

The leave type defaults from the accrual calculation box on the Earnings Accruals – Class Page.

Election

Select the enrollment status.

Select *Elect* to enroll the employee in a class

Select *Waive* to waive a leave just like a regular benefit.

Select *Terminate* to end the employee's enrollment in a class.

Elect Date

Enter the date on which the accrual election change occurs.

Effective Date

Select a date to specify when this accrual election becomes effective and the employee will be in the new earnings accrual class.

Alternate Work Schedule

The purpose of the alternate work schedule is for those employees on the Credit Leave Accrual. When the employee's work schedule changes, the system creates an additional pay record for them to pay out their current balance.

Grandfathered Carryover

Enter the grandfathered carryover here, if applicable. A grandfathered carryover is when an employee has a balance greater than the new earnings accrual-ceiling amount. For example, an employee who carried an annual leave balance of 360 hours in a previous class can transfer to a new class that has a ceiling of 240 hours. The difference of 120 hours between the new ceiling amount and the current balance of 360 is called the *Grandfathered Carryover*.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “(USF) Setting Up Additional U.S. Federal Payroll Functionality,” Defining Earnings Accrual Classes

Setting Up Leave Transfer Programs

To set up leave transfer programs, you must define the programs and the earnings codes and accrual classes used for processing.

This section discusses how to:

- Set up denial codes and denial notification letter text.
- Set up leave transfer programs.
- Set up earnings codes for leave transfer.
- Set up earnings accrual classes for leave transfer.
- Set up leave class rules for leave transfer.

Pages Used to Set Up Leave Transfers

Page Name	Object Name	Navigation	Usage
Denial Code	GVT_DENIAL_CD_TBL	Set Up HRMS, Product Related, Workforce Administration, Absence, Leave Denial Codes USF	Set up denial reasons and specify the text to be printed in denial notifications.
Leave Program Type Table	GVT_LV_XFR_TYP_TBL	Set Up HRMS, Product Related, Workforce Administration, Absence, Leave Transfer Type USF	Set up leave transfer programs, specify the program type, and indicate limits on donations and balances.
Leave Bank Details	GVT_LV_BANKMEM_SEC	Click the Leave Bank Details button on the Leave Program Type Table page	Enter Leave Bank board members.
Emergency Leave Transfer Details	GVT_LV_DON_TGT_SEC	Click the Emergency Leave Transfer Dt (emergency leave transfer details) button on the Leave Program Type Table page	Enter the number of donation hours targeted.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “(USF) Setting Up Additional U.S. Federal Payroll Functionality,” Defining Earnings Accrual Classes

Chapter 18, “(USF) Managing Leave,” Setting Up Leave Class Rule Criteria, page 423

Setting Up Denial Codes and Denial Notification Letter Text

Access the Denial Code page.

Denial Code

Denial Reason Code: 01

Scroll Area Find | View All First 1 of 1 Last

*Effective Date:	11/19/2002	*Status:	Active	+ -
*Description:	Not Eligible			
*Short Description:	Not Eligibl			
Denial Letter Text:	Not Eligible			

Denial Code page

Denial Letter Text Enter details of the reason for denial that you want to be printed on the Leave Denial Notifications report (FGPY031).

Setting Up Leave Transfer Programs

Access the Leave Program Type Table page.

Leave Program Type Table

Leave Program Type: BNK

Leave Program Type Information Find | View All First 1 of 1 Last

*Effective Date: 11/19/2002 *Status: Active

*Description: Leave Bank

Short Description: Bank

Leave Program **Leave Bank Details**

☒ Bank ☐ Emergency ☐ Voluntary

Donation Limits **Balance Limits**

*Minimum Hours: 1 Minimum Hours:

*Maximum Hours: 100 Maximum Hours: 500

Leave Program Type Table page

Leave Program Type Information

Leave Program Type	Define your leave program codes.
Leave Program	Select the type of leave transfer program (Bank, Emergency, Voluntary) to associate with this Leave Program Type code.
Donation Limits and Balance Limits	Enter the Minimum Hours and Maximum Hours allowable for donations and balances.
Leave Bank Details	If you select <i>Bank</i> in the Leave Program group box, the system adds the Leave Bank Details button to the page when you save. Click to access the Leave Bank Details page and enter the Leave Bank board members and indicate those who are labor representatives.
Emergency Leave Transfer Details (emergency leave transfer details)	If the Leave Program Type is <i>Emergency</i> , the system adds the Emergency Leave Transfer Details button to the page when you save. Click to access the Emergency Leave Transfer Details page and record the number of donation target hours.

Setting Up Earnings Codes for Leave Transfer

Set up three unique earnings codes for three distinct purposes:

- For donors to donate leave to transfer programs.
- For recipients to receive (accrue) leave from transfer programs.
- For recipients to use leave accrued from transfer programs.

Leave Earning Type

PeopleSoft provides five Leave Earning Type codes as translate values. Associate these types with earnings codes that you set up for processing leave transfers. The type code you select defines the function of the earnings code within the leave bank and transfer program. The following table summarizes the processing that is triggered by these codes.

Leave Earn Type	Leave Bank and Transfer Process	Earning Accrual Process
Donate to Bank	Updates the donor's Additional Pay page with the hours contributed to a Leave Bank Program. Use the Leave Bank Application page to enter requests. Updates Leave Bank Ledger inquiry page with hours contributed.	Donor's Annual: • Increase Hours Taken YTD • Reduce Balance YTD
Donate to Emergency	Updates the donor's Additional Pay page with the hours contributed to an Emergency Leave Transfer Program (ELTP). Use the Leave Bank Application page to enter requests. Updates the Leave Ledger with hours contributed.	Donor's Annual: • Increase Hours Taken YTD • Reduce Balance YTD
Donate to Recipient	Updates the donor's Additional Pay page with the hours contributed in the Voluntary Leave Transfer Program (VLTP). Use the Donor Contribution page to enter requests. Updates the Leave Donation Tracking page.	Donor's Annual: • Increase Hours Taken YTD • Reduce Balance YTD

Leave Earn Type	Leave Bank and Transfer Process	Earning Accrual Process
Received from Bank	Updates the recipient's Additional Pay page with the hours received from the Bank or ELTP. Use the Leave Recipient Info page to enter requests. Updates Leave Ledgers with hours withdrawn.	Leave Program Recipient: Increase Balance YTD
Received from Donor	Updates the recipient's Additional Pay page with the hours received through the VLTP. Use the Leave Recipient Info page to enter requests.	Leave Program Recipient: Increase Balance YTD

Setting Up Earnings Codes for Donors and Recipient Accruals

Use the Earnings Table component to set up earnings codes for donors and recipient accruals. You must use the specified values for the following fields:

- General page: In the Payment Type field, select *Hours Only*. Leave transfer earnings codes process hours only; there are no earnings or deductions associated.
- Taxes page: There are no taxes taken. In the Earning Allocation group box, select *Maintain Earnings Balances*.
- Federal Additional Earnings page: In the Leave Bank and Transfer Type group box, select the appropriate Leave Earnings Type.
- Calculation Page: The Multiplication Factor must be 0.0000 to ensure no earnings.

Setting Up an Earnings Code for Recipients to Use Transferred Leave

Use the Earnings Table component to set up earnings codes for recipients to use transferred leave. You must use the specified values for the following fields:

- General page: In the Payment Type field, select *Hours Only*.
- Taxes page: The earnings are fully taxable. In the Earning Allocation group box, select Add to Gross, Maintain Earnings Balances, and Hours Only.
- Calculation Page: The Multiplication Factor must be 1.0000 to ensure the earning is paid at the regular hourly rate.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “Defining Earnings Codes and Earnings Programs,” Establishing Earnings Codes

Setting Up Earnings Accrual Classes for Leave Transfer

Set up earning accrual classes for the following purposes:

- Leave program recipient

Once an employee is approved as a recipient in either a Bank, ELTP, or VLTP, they must be enrolled into an Earning Accrual Class to track hours received and used during their program participation.

- Deferred Annual/Sick Leave

When an employee is participating in either an Agency Bank or VLTP, they must terminate their enrollment from regular annual and sick leave plans and enroll into the deferred annual and sick earning accrual classes. The deferred programs will track service hours and entitlement to a defined maximum accrual. For example, full time employees may accrue to the maximum of 40 hours.

Employees participating in an ELTP are not subject to the accrual limit and do not need to be enrolled into the deferred programs.

- Annual Leave

All donated hours are taken from the employee's annual leave accrual class. Update each of your annual accrual classes with the three donor earning codes defined with Donate to Bank, Donate to Emergency, and Donate to Recipient leave earning types.

Setting Up Earnings Accrual Classes for Leave Program Recipients

Use the Earnings Accruals component to set up earnings accrual classes for leave program recipients. You must use the specified values for the following fields:

- Class page: In the Leave Type field, select *Leave Program*.
- Balance page: The values you enter depend upon the purpose of the earnings code you're adding to the class.

For earnings codes used to accrue recipient leave transfer, select *Add to Hours Earned*.

For earnings codes used when recipients use transferred leave, select *Add to Service Hours* and *Add to Hours Taken*.

Setting Up Earnings Accrual Classes for Deferred Annual/Sick

Use the Earnings Accruals component to create a deferred earning accrual class for every annual and sick accrual class that has a different accrual maximum during an employee participation in the leave bank or transfer programs.

Deferred accrual classes need to mirror the accrual classes that they are replacing; the only difference in the two classes is the leave type and accrual ceiling.

For example, the Deferred Annual Accrual Class mirrors the Annual Accrual Class by having the same accrual calculation, carryover, expiration/termination, accrual rates, and balance earning codes. The only difference in the two classes is the Leave Type and Accrual Ceiling. In this example, enter the following information:

- Class page: In the Leave Type field, select *Deferred Annual*.
- Ceiling/Carryover page: Set up the accrual ceiling as desired for the deferred accrual class.

Setting Up Annual Accrual Classes for Leave Transfer Processing

All donated hours to bank and transfer programs are withdrawn from the employee's Annual Leave Accrual Class. You must update all your Annual Accrual Class Balance tables with the three earning codes you set up with the leave earnings types of Donate to Bank, Donate to Emergency, and Donate to Recipient.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “(USF) Setting Up Additional U.S. Federal Payroll Functionality,” Defining Earnings Accrual Classes

Setting Up Leave Class Rules for Leave Transfer

Access the Leave Class Rules page.

You can define leave class rules to enroll an approved recipient automatically into the accrual class that you create to track leave program activity. Use this page to define the automatic enrollment rule for each leave program type you set up.

- Select *Leave Program Status* as the Leave Class Rules Criteria Type.
- Select the appropriate Leave Program Type.

See Also

Chapter 18, “(USF) Managing Leave,” Setting Up Leave Class Rule Criteria, page 423

Administering Leave Donations

Employees may donate hours to an agency Leave Bank, ELTP, or VTLP. The contribution process is the same for the Bank and ELTP programs, where hours are donated to a common pool. However, the contribution process is different for the VLTP, where the hours are donated directly to an employee.

This section discusses how to:

- Enter employee requests to contribute leave to a Leave Bank or ELTP.
- Enter employee donations to the VLTP.
- Enter employee requests to donate to another agency's leave transfer program.
- Run the Leave Bank and Transfer process to process donations and update accruals, additional pay, and leave ledgers.

Pages Used to Administer Leave Donations

Page Name	Object Name	Navigation	Usage
Leave Bank Application	GVT_LV_BANK_APP	Workforce Administration, Leave Administration USF, Reports, Leave Bank Application/Donate	Enter employee requests to contribute leave to a Leave Bank or ELTP.
Donor Contribution	GVT_LV_DON_CONTRIB	Workforce Administration, Leave Administration USF, Manage Leave Information, Voluntary Donations	Enter employee donations to the VLTP.
External Leave Donations	GVT_LV_DON_EXT	Workforce Administration, Leave Administration USF, Manage Leave Information, External Leave Donations	Enter employee requests to donate to another agency's leave transfer program.
Process Leave Bank / Transfer	RUNCTL_FGPY022	Workforce Administration, Leave Administration USF, Manage Leave Information, Request Leave Bank/Transfers	Run the Leave Bank and Transfer process to process donations and update accruals, additional pay, and leave ledgers

Entering Employee Requests To Contribute Leave To A Leave Bank Or Emergency Leave Transfer Program

Access the Leave Bank Application page.

Leave Bank Application

Jones, Rebekah ID: K0G001 Empl Rcd#:

*Leave Program Type: Leave Bank

Find | View All First 1 of 1 Last

*Effective Date: 11/19/2002

*Member Status: Applied

Leave Bank Contribution Detail

*Contribution Hours: 8.00 Annual Leave Balance:

Service Date: 06/15/1996

Leave Bank Application page

Leave Program Type	Select the leave program type to which the employee is donating. Valid values are the Leave Program Types you set up for Bank and Emergency leave programs.
Effective Date	The request date of the application.
Member Status	Select or view the member status of the leave request. Values are: <i>Applied:</i> The Leave Bank Board has not processed the request and no annual leave contributions have been taken from the employee's current Earnings Accrual Class balance. <i>Approved:</i> The leave review board has approved the donor's leave request. The system processes only <i>Approved</i> requests. <i>Contribute:</i> The system processes the hours during the next payroll cycle and updates the hours on the employee's additional pay to reduce the balance by the donation hours on the application. Only the system can update the applicant's request to <i>Contribute</i>; it issues an error message if you select this value. <i>Cancelled:</i> Indicates any other reason that the request is terminated. <i>Denied:</i> The Leave Bank Board has evaluated the request and denied the donor's leave request.
Denial Reason 1 and 2	These fields appear if you select Denied as the Member Status. You must provide the applicant with at least one reason for denial.
Contribution Hours	Specify the number of hours the donor is contributing to the leave bank or ELTP.
Annual Leave Balance	Displays the number of hours of annual leave the employee has as of this request date (Effective Date).
Service Date	The basis for determining the length of service, on which the required contribution minimum is based.

Entering Employee Donations to Voluntary Leave Transfer Program

Access the Donor Contribution page.

Donor Contribution

Shultz,Paula

Recip Emplid: FRG020

Empl Rcd#:

Leave Program Type:

Voluntary Leave Transfer Prg.

Leave Application Status:

Approved

Request Date:

01/01/2000

Voluntary Contribution Details

*Effective Date:

01/01/2000

Donor Details

Emplid

*National ID

*Name

Agency

Sub-Agency

Donation Hours

Hours Used

Pay Period End Date

Return t

1	FRG7009	700007009	Golay,Jeannie	FRG	ZZ	5.00			

Donor Contribution page

Note. Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

Recipient information is displayed at the top of the page.

Effective Date The date of the donation.

Donor Tracking

In this group box, enter the donor information. The system enters the pay period in which the donation was processed. Donations are not processed until the recipient's application is approved.

The Return to, Returned Processed, and Pay Period Return Date assist you in recording your manual leave donation return process. If an employee has donated leave, and it is not needed, it may be returned to the donor.

Return to Acknowledges the donor's choice for the disposition of where the leave should be returned in the case that any unused leave is returned. Valid values are *Donor* or *Bank*. This field is informational only and used to track the return of excess leave donation hours.

Returned Processed When a leave recipient has excess leave when their emergency is over, select this check box when the leave amount to be returned is restored to the Donor. This field is informational only and used to track the return of excess leave donation hours.

Pay Period Return Date Enter the date the leave is restored to the donor. The field is informational only and used to track the return of excess leave donation hours.

Entering Employee Requests To Donate To Another Agency's Leave Transfer Program

Access the External Leave Donations page.

External Leave Donations

Sanders, Joseph W

Employee

EmplID: K0G011

External Leave Donations							Customize	Find	View All
	*Effective Date	Leave Program Type	Name	National ID	Agency	Sub-Agency	*Donation Hours		
1	11/19/2002	EMR			AG	11	8		

External Leave Donations page

Note. Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

Record the details of donations made by an employee in your agency to another agency's leave transfer program. The system updates the donor's accrual balances when you run the Leave Bank / Transfer process.

Running the Leave Bank and Transfer Process

Access the Process Leave Bank / Transfer page.

Run the Leave Bank and Transfer process (FGPY022) after employees have donated hours. The process loads the Additional Pay page and applies the donation amount to the Leave Ledgers. The process can be run multiple times and should be run prior to your payroll cycle.

The system processes all employee leave bank applications with Member Status *Approved* and an effective date equal to or before the As of Date you enter on the run control page.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, "Maintaining Payroll Data,"
Entering Additional Pay Earnings Information

Chapter 18, "(USF) Managing Leave," Running the Leave Bank and Transfer Process
for Approved Recipients, page 440

Administering Leave Recipients

Employees may receive hours from a Bank, ELTP or VTLP. The process to receive hours from all leave program types is the same.

This section discusses how to:

1. Enter employee requests to receive hours from any of the leave program types.
2. Enroll recipients in the leave program accrual class.
3. Run the Leave Bank and Transfer process for approved recipients.
4. View and adjust the data entered by the Leave Bank and Transfer process.
5. View recipient accrual balances.

Page Used to Administer Leave Recipients

Page Name	Object Name	Navigation	Usage
Leave Recipient Info (leave recipient information)	GVT_LV_RECIP_INFO	Workforce Administration, Leave Administration USF, Manage Leave Information, Create Leave Recipient App	Enter employee requests to receive hours from any of the leave program types.

See Also

Chapter 18, “(USF) Managing Leave,” [Manually Entering or Adjusting Leave Enrollment](#), page 426

Chapter 18, “(USF) Managing Leave,” [Pages Used to Administer Leave Donations](#), page 435

Enter Employee Requests to Receive Hours From Any of the Leave Program Types

Access the Leave Recipient Info page.

Leave Recipient Info

Jackson,Edward ID: K0G017 Empl Rcd#:

Leave Program Type: VLT Voluntary Leave Transfer Progr **Program:** Voluntary

Find | View All First 1 of 1 Last

*Effective Date: 11/19/2002

*Leave Reason: Family

*App Status: Approved Application Status

Hours

*Duration Hours: 40.00 ☐ Is this a recurrence

*Start Date for Gen Standing PO: 10/31/2002 *End Date: 11/29/2002

Emergency Description:

Leave Recipient Info page

Effective Date	Enter the date that leave program participation was requested.
Leave Reason	Select the reason for the emergency leave requested. Values are <i>Employee</i> , <i>Family</i> , and <i>Agency</i> .
App Status (application status)	Select the status from the following values: <i>Pending:</i> The leave review board has not processed the request. <i>Approved:</i> The leave review board has approved the request.

Denied: The leave review board has denied the request.

Separated: The employee separated from Federal service before the originally requested end date.

Cancelled: Any other reason that the request is not active.

Position Data

Click to view the position number, pay plan, grade, and step of the potential leave recipient as of the request date. Standard hours and tour of duty are used to validate the minimum number of absence hours.

Application Status

Click to identify the approver and the status Date. If the Leave Recipient Application has a status of Denied, then you may enter up to two. You must enter at least one denial reason. These codes are used later when generating Leave Recipient Denial letters.

Hours

Duration Hours

Enter the number of hours requested (to the quarter-hour).

Is this a recurrence

Select if the reason is a recurrence.

Start Date and End Date

Enter the days on which the recipient requests the leave to begin and end.

Emergency Description

Detail the reasons for needing transferred leave, including a brief description of the nature and severity of the emergency.

Enrolling Recipients in the Leave Program Accrual Class

While receiving hours from a leave program, the recipient must be enrolled in the leave program accrual class to record hours donated and used.

If the program is either a Bank or VLTP, terminate enrollment from their regular and sick earnings accrual classes using the Employee Accruals page. Then enroll the recipient into the deferred accrual classes to track accruals during the program participation and enforce the maximum entitlement.

If there is an auto enrollment leave class rule set up for the leave programs, then once the approved request is saved, the application opens the employee's Employee Accruals page and inserts the earning accrual defined in the class rule. While in the page, you may terminate the annual and sick and enroll the employee in the deferred annual and sick accrual classes.

See Also

Chapter 18, "(USF) Managing Leave," Manually Entering or Adjusting Leave Enrollment, page 426

Running the Leave Bank and Transfer Process for Approved Recipients

Access the Process Leave Bank / Transfer page.

The Leave Bank & Transfer process (FGPY022) processes *Approved* recipients.

If the employee is participating in a Bank or ELTP, the process:

- Updates the recipient's Additional Pay page with the earnings code defined on the Earnings Code Table with *Received from Bank* as the Leave Earning Type.
- Updates the Leave Ledger with hours withdrawn.
- If the employee is participating in a VLTP, the process updates the recipient's Additional Pay page with earnings code defined on the Earnings Code Table with *Received from Donor* as the Leave Earning Type.

See Also

Chapter 18, “(USF) Managing Leave,” Running the Leave Bank and Transfer Process, page 438

Viewing the Data Entered by the Leave Bank and Transfer Process

See Chapter 18, “(USF) Managing Leave,” Viewing Leave Donations to Leave Bank and Emergency Leave Transfer Programs, page 442.

Viewing Recipient Accrual Balances

See Chapter 18, “(USF) Managing Leave,” Viewing Donor and Recipient Accrual Summaries, page 443.

Viewing Leave Transfer Data

After you run the Leave Bank / Transfer process, you can view leave transfer data.

This section discusses how to:

- View leave donations to leave bank and emergency leave transfer programs.
- View leave donations to voluntary leave transfer programs.
- View donor and recipient accrual balances.
- View donor contributions or hours received by recipients.
- View a summary of participation in a leave transfer program.

Pages Used to View Leave Transfer Data

Page Name	Object Name	Navigation	Usage
Leave Ledger	GVT_LV_BANK_LDGR	Workforce Administration, Leave Administration USF, Manage Leave Information, Review Leave Bank Ledger	View and adjust leave donations to leave bank and emergency leave transfer programs.
Leave Donation Tracking	GVT_LV_DON_TRACK	Workforce Administration, Leave Administration USF, Manage Leave Information, Track Leave Donation	View leave donations to voluntary leave transfer programs.
Leave Program Summary	GVT_LV_PRGM_SUMM	Workforce Administration, Leave Administration USF, Manage Leave Information, Review Leave Program Summary	View a summary of participation in a leave transfer program.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “Maintaining Payroll Data,”
Entering Additional Pay Earnings Information

PeopleSoft 8.8 Payroll for North America PeopleBook, “Reviewing, Adjusting, and Deleting Employee Balances,” (USF) Reviewing and Adjusting Leave Accrual Balances

Viewing Leave Donations to Leave Bank and Emergency Leave Transfer Programs

Access the Leave Ledger page.

Leave Ledger

Leave Bank ID: BNK Leave Bank Available (Hrs):

Effective Date	EmpID	Name	Member Status	Contribution/Withdrawal
1				

Find | View All First 1 of 1 Last

Effective Date: 11/19/2002 Description: Contribution/Withdrawal: Contribute Hours:

Leave Ledger page

The Leave Ledger tracks the activity within the Bank and ELTP leave programs. The Leave Bank and Transfer process updates the ledgers with the transactions it has processed.

Available (Hrs) Displays the total number of hours available in the bank or ELTP. The system updates this value when you adjust the Contribution/Withdrawal and Hours fields.

Leave Bank Ledger

Effective Date Displays the As Of Date on the Leave Bank / Transfer process run control page.

EmplID and Name List of all the employees who have participated in the bank.

Member Status Displays the member status for the transfer.

Contribution/Withdrawal Indicates whether each transaction is a contribution or a withdrawal.

Hours Displays the number of hours contributed or withdrawn in each transaction.

Agency Ledger Adjustments

To adjust the hours, enter the effective date, the reason for the adjustment, and the hours to add or subtract. The system updates the Available Hours balance at the top of the page.

Viewing Leave Donations to Voluntary Leave Transfer Programs

Access the Leave Donation Tracking page.

Leave Donation Tracking

Jones,Rebekah

Employee

EmplID: K0G001

Leave Recipient LedgerTracking									
	Donation Effective Date	Leave Program Type	Recipient Emplid	National ID	Name	Agency	Sub-Agency	Donation Hours	R
1									

Leave Donation Tracking page

Note. Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

The Leave Donation Tracking page tracks the activity within the VLTP program. The Leave Bank & Transfer process updates this page with the transactions it has processed.

The page lists the donor’s contributions by effective date and recipient.

Viewing Donor and Recipient Accrual Summaries

View donor and recipient accrual balances on the Accrual Summary page after payroll is processed and leave accruals are run.

- Donors: The fields Hours Taken Year-to-Date and Hours Balance Year-to-Date are updated with the hours contributed.
- Recipients: Leave program earning accrual is updated with the hours received. When the recipient uses hours, the Hours Taken Year-to-Date and Service Hours YTD are updated.

- Recipients who terminate regular and sick accrual classes and enroll in deferred accrual classes: The deferred accrual class is updated with the pay period's Service Hours YTD, Hours Earned Year-to-Date, and Hours Balance Year-to-Date.

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “Reviewing, Adjusting, and Deleting Employee Balances,” (USF) Reviewing and Adjusting Leave Accrual Balances

Viewing Donor Contributions or Hours Received by Recipients

The Leave Bank and Transfer process inserts a row in the Additional Pay page for hours donated or received. The new row contains donor contribution or hours received information in the following fields.

Earnings Code	The earnings code associated with the appropriate Leave Earn Type.
Effective Date	The As Of Date on the Leave Bank / Transfer page.
Earnings End Date	The end date of the pay period in which the effective date falls.
Hours	The hours donated or received.

Viewing a Summary of Participation in a Leave Transfer Program

Access the Leave Program Summary page.

Leave Program Summary

Leave Program Type: VLT Voluntary Leave Transfer Progr

Process Summary

From Date: 02/04/2002 **Thru Date:** 11/29/2002

Calculate Leave Summary

Participants	Total Hours
Approved Participants:	Total Contribution (Hrs):
Denied Participants:	Used (Hrs): =====
	Available (Hrs):

Leave Program Summary page

From Date and Thru Date	Define the time period for which you want to see a summary.
Calculate Leave Summary	Click after entering the date range. The system displays summary information.
Participants	The system displays the number of approved participants and denied participants.

Total Hours

The system displays the total number of hours contributed, the total number of hours used, and the number of hours available for use (derived from the contribution hours and used hours).

Reporting on Leave Transfer Programs

PeopleSoft provides the following leave transfer reports:

- FGPY028 – Leave Acceptance Notifications
- FGPY029 – Leave Bank Participants (required by OPM)
- FGPY030 – Leave Transfer Participants (required by OPM)
- FGPY031 – Leave Denial Notifications

See Also

PeopleSoft 8.8 Payroll for North America PeopleBook, “PeopleSoft Payroll for North America Reports”

Glossary of PeopleSoft Terms

absence entitlement	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.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
account	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.
accounting class	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.
accounting date	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.
accounting entry	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.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	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.
action reason	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.
activity	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.
allocation rule	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.
alternate account	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.
application agent	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.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attachment	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.
background process	In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	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.
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	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.
budget period	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.
business event	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).
catalog item	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.
category	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.
ChartField	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.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	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.
child	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.
Class ChartField	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> .
clone	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.
collection	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.
compensation object	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.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
configuration parameter catalog	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.
configuration plan	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.
content reference	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.
context	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.
corporate account	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.
cost profile	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.
cost row	A cost transaction and amount for a set of ChartFields.

data acquisition	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).
data elements	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.
data row	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.
data validation	In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.
DAT file	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.
delivery method	In PeopleSoft Enterprise Learning Management, identifies a learning activity's delivery method type. An activity can have one or more delivery methods.
delivery method type	In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.
distribution	The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.
double byte character	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].
dynamic tree	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.
edit table	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.
effective date	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.
EIM job	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.
EIM ledger	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.
equipment	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.

event	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.
event propagation process	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.
external system	In PeopleSoft, any system that is not directly compiled with PeopleTools servers.
fact	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.
filter	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.
generic process type	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.
group	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.
homepage	Users can personalize the homepage, or the page that first appears when they access the portal.
incentive object	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.
incentive rule	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.
key	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.
learner group	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.
learning activity	See <i>activity</i> .
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities.
learning plan	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned and in-progress learning activities.
ledger mapping	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.

level	A section of a tree that organizes groups of nodes.
library section	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.
linked section	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.
linked variable	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.
load	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.
local functionality	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.
location	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.
market template	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.
material	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.
message definition	An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.
meta-SQL	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.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, 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.
multibook	Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
objective	In PeopleSoft Enterprise Learning Management, an individual's learning goal. An example of a learning goal is a competency gap.
override	In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.
pagelet	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.

parent node	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.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>participant object</i> .
payout	In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.
PeopleCode	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.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an RDBMS, an application server, a Web server, and a browser.
performance measurement	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.
period context	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.
per seat cost	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.
plan	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.
plan context	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.
plan section	In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.
plan template	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.
portal registry	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.
private view	A user-defined view that is available only to the user who created it.
process	See <i>Batch Processes</i> .
process definition	Process definitions define each run request.
process instance	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.
process job	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.
process request	A single run request, such as an SQR, a COBOL program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	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.
product category	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.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record definition	A logical grouping of data elements.
record field	A field within a record definition.
record group	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.
record input VAT flag	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.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	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).
reference transaction	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.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
results management process	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.
role user	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.
role	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.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
routing	Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takes email message, electronic form, or worklist entry.
run control	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.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	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.
search query	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.
section	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.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
self-service application	Self-service refers to PeopleSoft applications that are accessed by end users with a browser.
session	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.
session template	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.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
sibling	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.
single signon	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.
source transaction	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.
SpeedChart	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.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
SQR	See <i>Structured Query Report (SQR)</i> .
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
Structured Query Report (SQR)	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.
Summary ChartField	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).
summary ledger	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.
summary tree	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.

table	The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).
TableSet sharing	Specifies control table data for each business unit so that redundancy is eliminated.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
template	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.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	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.
transaction allocation	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.
transaction loading process	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.
transaction state	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.
transaction type	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.
Translate table	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.
tree	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.
unclaimed transaction	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.
uniform resource locator (URL)	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&ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k</code>
universal navigation header	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.

Index

Numerics/Symbols

- 60 Day Prob Term (USF) page 409
- 60 Day Ten Conv (USF) page 409

A

- AA Security JPN page 292
- Accident Insurance Address (DEU) page -
 - Accident Insurance 25
- accident insurance codes 26
- Accident Insurance Table - Accident Insurance (DEU) page 25
- Accident Insurance Table (DEU) page -
 - Accident Insurance 26
- Accomm Job Task page 198
- Accomm Option page 198
- Accomm Request page 198
- Accommodation Type Table page 198
- Accounting Information (USF) page 142, 168
- accrual classes (USF) 426, 433
 - for deferred annual/sick 433
 - for leave program recipients 433, 440
 - for leave transfer processing 434
- Accrual Summary (USF) page 443
- Action History Report (USF) page 385
- Action Reason Table page - Action Reason Report 10
- Action Reason Table page - Action Reasons 10
- action request (SF-52) 382
- Ad-Hoc Process Request page 357
- Additional Appointment Data (JPN) page 294
- Additional Appointment Information (JPN) page 294–295
- Additional Appointment Setup (JPN) page 289
- Additional Appointment Setup for Existing Business Units page 289
- additional appointments (kenmu) 285
 - adding, changing, or releasing 295
 - designating job record codes 290
 - distributing cost 297
 - recording and viewing employee data 294
 - recording details 295
 - setting up codes 286
 - setting up dummy codes 289
 - setting up security 290
 - setting up termination handling 293
 - understanding 285
 - understanding setup steps 287
- Additional Appointments Setup (JPN) page 290
- additional documentation xx
- Additional Info - Brazil page 47–48
- Addl Birth Info (USF) page 141, 149
- Address Data (ITA) page 277
- Address History page 68, 71
- Address Information (USF) page 141, 150
- Address page 212, 215
- addresses 71, 150
 - modifying (USF) 325
 - using workflow to update 324
- AFI flat files 268
- AFI Generation (ESP) page 269
- Annual Leave (USF) page - Setup Wage/Separation USF 386–387
- applicants
 - adding 129
 - hiring (USF) 177
- application fundamentals xix
- appointment affidavits 178
- Appointment Info (USF) page 142, 172
- Appointment List JPN page 345
- Appointment List report (JPN) 347
- Appointment Notification JPN page 345
- Appointment Notification report (JPN) 346
- appointment reporting
 - report outputs for actions 329
 - sorting lists using trees 330
 - understanding job data changes 329
- As-of Date Request page 357
- Assign Additional Job component 129
- automatic actions (USF) 405
 - administering probation terminations 410
 - administering tenure conversion 411

- overview of menus and pages 407
- prerequisites 405
- processing 409
- understanding 406
- Automatic Actions (USF) page 409
- automatic leave enrollment (USF)
 - adjusting leave enrollment
 - manually 426
 - overview 419
 - processing 425
 - qualifying for more than one leave class
 - criteria rule 422
 - reviewing 426
 - setting up leave class rule criteria 423
 - setting up the leave class rules
 - template 421
- Automatic Leave Enrollment (USF)
 - page 421, 425
- Award Action Data (USF) page 14
- award actions 14
- Award Data (USF) page 140, 144
- Award Type Table page 14
- awards 403

B

- BA Cd Table (DEU) page 25
- Badge page 237
- badges 237
- Bank Account Information page 232
- bank accounts
 - entering for UK employees 233
 - recording 232
- Base (BEL) page 255
- BEL Seniority page 252
- Belgium
 - entering additional seniority 252
 - entering protected job leave 254
 - generating DIMONA notifications 260
 - running the Social report 264
 - tracking Claeys formula
 - calculations 243
- beneficiaries, *See* dependents
- benefit enrollment 124
- Benefit Program Participation page 124
- benefit programs 156, 367
- benefit record numbers
 - working with multiple benefit record
 - numbers 131
- Benefits Program Participation page 70

- Benefits/FEHB Data (USF) page 141, 156
- Benefits/Retirement Data (USF)
 - page 365, 367
- Betriebszaehlung 268
- Brazil
 - CAGED Report 133
 - centralizing data for reporting
 - purposes 52
 - employee registration 133–134
 - entering CAGED report information 14
 - entering setup information for
 - reports 48
 - running employment reports 132
 - setting up establishments 46
 - See Also* establishments
- Building Society Details (GBR) page 232, 235
- business expenses 238
- Business Expenses page 237–238
- business processes 1, 5

C

- C.I.A Codes (ITA) page - Company/Estab
 - Codes 31
- C.I.A. Codes (ITA) page - Company
 - Codes 31
- Cadastro Geral de Empregados e Desempregados (CAGED) 14
- CAGED 14
- CAGED File/Report page 133
- CAGED Report (BRA) 133
- Caisse Primaire d'Assurance Maladie (CPAM) 22
- Caisse Regionale d'Assurance Maladie (CRAM) 22
- Calendar Year Request page 357
- Canada
 - defining reasons for personnel
 - actions 12
 - entering additional workforce data 265
 - entering information for the Canada
 - Academic Teaching Surveys 118
 - entering OEE workforce survey
 - responses 267
 - entering official languages 267
 - reviewing union membership 106
 - running the Canadian Hire List
 - report 135

- verifying Social Insurance Numbers for Canadian employees 82
- Centralization Data (BRA) page 52
- Centralization Data page 47
- centralized data 52
- Change Security Basis (JPN) page 292
- Checklist Item Table page 18
- Checklist Table page 18
- checklists 17–18
- Citizenship / Country / Visa page 228
- citizenship information 227
 - entering 229
 - entering for dependents 224
 - tracking 228
- Citizenship/Passport page 228
- Claeys Formula calculations 243, 251
 - calculating the severance amount 258
 - defining reason codes for ending contracts 245
 - entering termination events and conditions 245
 - getting ready to use 251
 - linking contract statutes to RSZ categories 247
 - performing 254
 - recording replacement contracts 249
 - recording terminations 248
 - reviewing variables 255
 - running the termination notification report 260
 - setting up employment contract statutes 246
 - understanding 251
- comments, submitting xxiii
- common elements xxiii
- Comp Rate Code Secondary Panel page 359
- companies (ESP) 45
- company credit cards
 - assigning to employees 207
 - entering vendors 207
- company property
 - assigning to employees 210
 - assigning values 210
 - identifying 209
- Company Property page - Company Property 209
- Company Property page - Job Information 209–210
- Company Setup (ESP) page 38, 45

- Company Statistics (CHE) page 268
- Company Statistics report (Betriebszaehlung) 268
- Compensation (USF) page 142, 162
- Compensation page 69, 110
- Compensation tab 361
- Completion of IC Transfer report 318
- Concurrent Hire USF component 129
- concurrent jobs 129
 - adding (USF) 177
 - entering 132
 - setting up 130
 - setting up (USF) 178
- Consolidated Publications Incorporated (CPI) xx
- Contact Address/Phone page 225, 324
- contact information xxiii
- Contract Clause Table page 183
- Contract Ending (BEL) page 244, 248
- Contract Information page 183, 194
- Contract Information report 194
- Contract Replacement (BEL) page 244, 249
- Contract Status/Content page 183, 186
- Contract Template Table page 183, 185
- Contract Type Table page 183–184
- Contract Type/Clauses page 183, 189
- contracts, *See* employment contracts
- Contribution (ESP) page 38, 43
- country codes (ESP) 39
- country-specific documentation xxii
- country-specific workforce data 265
- CPAM 22
- CRAM 22
- Credit Card Data page 207
- Credit Card Vendor page 207
- cross-references xxii
- Customer Connection Website xx

D

- Data Control (USF) page 140, 143, 382
- Database Audit page 357
- Database Audit report 357
- database audits 357
- deaths
 - entering 339
 - requesting terminations (USF) 402
- Declaração de Informações à Receita Federal (DIRF) 51
- Denial Code (USF) page 428–429

- denial notifications (USF) 429
- Department Action Notices page 344
- Departmental Hierarchy (USF) page 141
- departmental reassignments, entering (USF) 400
- departmental transfers 335
- Depdnt Citizenship/Passport page - Depdnt Identification Details 224
- Depdnt Citizenship/Passport page -Depdnt Identification Details 213
- Depdnt Visa/Permit Data page - Depdnt Identification Details 213, 224
- Dependent Data component 211
- Dependent Information component 211
- Dependent/Benef (NLD) page 213, 223
- Dependent/Beneficiary Riders page 212, 221
- dependents 211
 - entering addresses 215
 - entering court-ordered benefits 221
 - entering dependent information 216
 - entering identification data 224
 - entering Medicare information 222
 - entering names 213
 - entering visa and permit data 224
 - understanding dependent data 211
 - viewing list for employee 223
- Detail Assignment (USF) page 141, 160
- DIMONA Notification (BEL) page 261
- DIMONA notifications 260
 - creating 261
 - creating update and termination notifications 264
 - reviewing 263
 - understanding 261
- DIRF 51
- disabilities
 - documenting accommodations 205
 - entering 199
 - running the Disability report (ITA) 205
 - tracking 197
- Disability Codes (NZL) page 36
- Disability page 198–199
- Disability Report (ITA) page 199
- diversity 77
- documentation
 - country-specific xxii
 - printed xx
 - related xx
 - updates xx

- Donor Contribution (USF) page 435–436
- driver's license data 231
- Drivers License page 231
- Drivers License Type Tbl page 16
- Duties Type page 10
- Dynamic Link page 18

E

- Edit Additional Appointment Information (JPN) page 294–295
- education 153
- Education Details (USF) page 141, 153
- education information 176
- effective dates
 - entering multiple actions with same effective date 328, 397
 - using in personnel actions (USF) 396
- ELTP 420
- email addresses 71
- emergency contacts 224–225
 - updating addresses 324
 - updating addresses (USF) 325
- Emergency Contacts page 225
- Emergency Leave Transfer Details (USF) page 428
- Emergency Leave Transfer Program 420
- Empl Comp Cd Ita page 277
- Employee Accruals (USF) page 421, 426
- Employee Assignment List report (JPN) 349
- Employee Checklist page 60
- employee checklists 61
- employee contracts
 - generating the Contract Information report 194
 - recording Belgian replacement contracts 249
- employee data
 - adding and updating data for personnel action requests (USF) 374
 - entering 237
 - refreshing for accurate reporting 355
 - security considerations (USF) 398
 - viewing non-Administer Workforce summary pages 368
- Employee Home Address Listing page 326
- employee identification 15
- employee IDs
 - assigning 64

- assigning for Japan 65
- changing and deleting 322
- employee images 241
- employee information
 - searching by National ID 181
 - searching for 180
- employee job history
 - viewing 359–360
 - viewing salary history 362
- Employee Photo page 237, 241
- employee registration (BRA) 133–134
- Employee Registry page 133–134
- Employee Request (USF) component 373
- employee status 331
 - and personnel actions 394
- Employee Turnover Analysis page 345
- Employees Birthday page 326
- Employees on Leaves of Absence
 - page 344
- Employees table, refreshing 355
- Employment 1 (USF) page 142, 169
- Employment 2 (USF) page 142, 173
- employment contracts
 - adding basic information 186
 - adding signature date and probation
 - information 193
 - adding special clauses 189
 - defining contract types 184
 - defining reason codes for ending
 - (BEL) 245
 - linking Belgian contract statutes to RSZ
 - categories 247
 - recording termination information for
 - Belgian employees 248
 - recording terms for ending for Belgian
 - employees 245
 - setting up and tracking 182
 - setting up Belgian employment contract
 - statutes 246
 - setting up standard contracts 185
- employment data 17
- employment data (USF) 164
- Employment Data (USF) page 365
- Employment Information page 69, 114
- Employment Phone Numbers (USF)
 - page 142
- employment record numbers
 - assigning 65

- working with multiple employment
 - record numbers 130
- End Contract Reason - BEL
 - page 244–245
- End Contract Type - BEL page 244–245
- end of employment information 278
- Enter Cost Rate Information (JPN)
 - page 294, 297
- entering requests (USF) 401
- Equal Opportunities report 279
- ES-931
 - entering identification information 386
 - entering leave information 387
 - entering severance pay information 388
 - generating 385
- Establishment ID Type page 47
- establishment ID types 47
- establishments
 - grouping 52
 - setting up 48
 - setting up ID types 47
- Ethnic Groups page 17
- expected pay 167
- Expected Pay (USF) page 142, 165
- Expiration Dates (USF) page 142, 171
- External Leave Donations (USF)
 - page 435, 437

F

- Federal Medicare Flags (USA) page 213, 222
- FEGLI/Retirement/FICA (USF)
 - page 141, 158
- festive advances 119
- FRA CPAM Table page 22
- FRA CRAM Table page 22
- France
 - defining hours type codes 22
 - entering additional workforce data 271
 - entering military service
 - information 272
 - maintaining social security tracking
 - codes 22
 - setting up occupational illness
 - categories 23
 - setting up workforce tables 21
 - tracking mandates 272
- From/Thru Dates Request page 357
- Function Code Table (DEU) page 25

G

General Comments page 237
 Germany
 Berufsgenossenschaften 24
 Bundesanstalt für Arbeit 25
 defining accident insurance codes 26
 defining reasons for personnel actions 12
 entering Nation Deuev codes 26
 German Deuev Directive 26
 setting up workforce tables 24
 understanding social insurance 24
 Verzeichnis der Berufsbezeichnungen 25
 global assignments
 entering dependent identification data 224
 entering dependent visa and permit data 224
 glossary 447
 GPS 50
 Guia de Recolhimento da Previdência Social (GPS) 50

H

Heavily Disabled (DEU) page 198
 Heavily Disabled Equaliz (DEU) page 199
 Hire Employee USF component
 Accounting Information page 168
 Addl Birth Info page 149
 Address Information page 150
 Appointment Info page 172
 Benefits/FEHB Data page 156
 Compensation page 162
 Data Control page 143
 Detail Assignment page 160
 Education Details page 153
 Employment 1 page 169
 Employment 2 page 173
 Expected Pay page 165
 Expiration Dates page 171
 FEGLI/Retirement/FICA page 158
 Job page 154
 Job Tracking Info page 146
 Marital Status page 152
 Non Pay Data page 174
 Other Pay Information page 165
 PAR Remarks page 146

Personal Data page 147
 Position page 160
 Security Info page 175
 Veterans Info page 151
 Hire List page 136
 hiring
 salary plans, entering 109
 hiring applicants 129
 Hiring Center (ESP) page 38, 46
 hiring centers 46
 hiring employees 67
 adding concurrent jobs 129
 distributing job earnings 121
 entering address, phone, and email address information 71
 entering benefit enrollment information 124
 entering compensation 110
 entering job information 92
 entering job location and position 85
 entering labor agreement information 101
 entering name information 70
 entering optional employment data 114
 entering payroll processing data 106
 entering personal information 72
 establishing work eligibility and diversity 77
 understanding the hiring process pages 67
 United States Federal 137
 using the Personnel Action Request (PAR) process 138
 hiring nonemployees 125
 hiring process 63
 choosing 54
 entering data 55
 how business unit and setID affect 53
 overview 53
 setting up 60
 the three Rs of hiring an employee 59
 updating versus hiring 53
 user security considerations 54
 using the Manage Positions business process 56
 using workflow to manage 57
 hiring United States Federal (USF) employees
 adding concurrent jobs 177
 entering address information 150

- entering appointment limits 172
- entering award information 144
- entering birth information 149
- entering compensation information 162, 165
- entering current and historical employment information 169
- entering data control information 143
- entering education details 153
- entering job information 154
- entering job tracking information 146
- entering marital information 152
- entering PAR remarks 146
- entering personal information 147
- entering position information 160
- entering retirement data 158
- entering security and financial disclosure information 175
- entering veteran information 151
- hiring applicants 177
- specifying benefit programs 156
- tracking information for employees on assignment 160
- viewing expected pay 165
- viewing job earnings distributions 168
- hiring United States Federal employees 137
- historical employment information 169
- Hour Type Table (FRA) page 22
- hours type codes 22
- HR Request (USF) component 373
- human resources records 179

I

- IC Trans External Company/Dept page 34, 289
- IC Trans External Superv Lvl page 34, 36, 289
- ID Change page 322
- ID Delete page 322
- Identification (USF) page - Setup Wage/Separation USF 386
- Identity/Diversity page 69, 77
- INAIL Codes (ITA) page - Company Codes 30
- INAIL Codes (ITA) page - Company/Estab Codes 31
- individual retirement records 402
- Industrial Inspection (DEU) page 26
- Industry Activity (ESP) page 38

- INPDAI Codes (ITA) page - Company Codes 30
- INPDAI Codes (ITA) page - Company/Estab Codes 31
- INPS (Istituto Nazionale per la Previdenza Sociale) codes 32
- INPS Codes (ITA) page - Company Codes 30
- INPS Codes (ITA) page - Company/Estab Codes 31
- insurance companies
 - entering information (ESP) 39
- Insurance Company (ESP) page 38–39
- integrations 7
- intercompany transfers (shukkou) 299
 - and search page security 316
 - entering and maintaining home/host data 304
 - multiple companies using single HR database 309, 313
 - running the Completion of IC Transfer report 318
 - selecting actions and reasons for 303
 - setting compensation owner 304
 - setting up employee data 303
 - setting up intercompany transfer company data 33
 - single company using single HR database 305
 - summary of home/host data 299
 - understanding 299
- IRR, *See* individual retirement records
- IT Country FCode (ITA) page 31
- ITA C.I.A. Table page 29
- ITA City Table page 30
- ITA Employee Documentation page 277
- ITA Employee Job Letter page 277
- ITA Employee Terms page 278
- ITA Equal Opportunities page 280
- ITA INAIL Table page 30
- ITA INPDAI Table page 30
- ITA INPS Table page 30, 32
- ITA Matricula Book Calc page 277
- ITA PREV Table page 30
- ITA Seniority Notification page 33
- Italy
 - defining INPS codes 32
 - defining seniority notification periods 33
 - recording additional hiring data 276

- recording end of employment information 278
- running the Disability report 205
- running the Equal Opportunities report 279
- running the Matricula Book Calculation process 277
- setting up Italian workforce tables 29

J

Japan

- appointment reporting for job data changes 329
- assigning other employee IDs 65
- changing employee IDs at rehire 65
- changing employee IDs for non-termination reasons 67
- changing employee IDs on permanent intercompany transfer 66
- running the Appointment List report 347
- running the Appointment Notification report 346
- running the Employee Assignment List report 349
- setting up supervisor levels 34
- tracking additional appointments (kenmu) 285
- tracking intercompany transfers (shukkou) 299
- Job (USF) page 141, 154
- job applicants, *See* applicants
- job codes 92
- job data
 - and effective dates 327
 - changing 320
 - running reports 342
 - security considerations for updating 330
 - updating 326
 - updating for a promotion 351
 - using workflow to maintain 333
 - viewing (USF) 366
- Job Data component
 - Compensation page 110
 - Job Information page 92
 - Payroll page 106
 - Salary Plan page 109
 - Work Location page 85
- Job Data1 (USF) page 365–366

- Job Data2 (USF) page 365
- Job Earnings Distribution page 70, 121
- job history
 - viewing 359–360
 - viewing salary history 362
- Job Information page 69, 92
- Job Labor page 69, 101
- job locations 85
- Job Summary JPN page 294, 359
- Job Summary page 359–361
 - General tab 360
 - Job Information tab 360
 - Work Location tab 361
- Job Tracking Info (USF) page 141, 146
- JPN Completion of IC Transfer page 318
- JPN Employee Assignment List 346

L

- labor agreements 101
- leave bank 420
- Leave Bank Application (USF) page 435
- Leave Bank Details (USF) page 428
- Leave Class Auto Entry Audit (USF) page 421, 426
- leave class rule criteria (USF) 423
- leave class rules (USF) 434
- Leave Class Rules (USF) page 421, 423, 434
- leave class rules template (USF) 421
- Leave Class Rules Template (USF) page 421
- Leave Donation Tracking (USF) page 442–443
- leave donations (USF) 434, 442–443
- leave earning types (USF) 431
- leave enrollment, automatic, *See* automatic leave enrollment (USF)
- leave enrollment, manual (USF) 426
- Leave Ledger (USF) page 442
- Leave Program Summary (USF) page 442, 444
- leave program type 425
- Leave Program Type Table (USF) page 428–429
- Leave Recipient Info (USF) page 439
- leave recipients (USF) 438
- leave transfer programs (USF)
 - reports 445
 - setting up 429

- viewing a summary of participation 444
- leave transfers (USF)
 - entering leave contributions
 - to a leave bank or emergency leave transfer program 435
 - to a voluntary transfer program 436
 - to another agency's leave transfer program 437
 - entering leave requests 439
 - overview 420
 - setting up denial notifications 429
 - setting up earnings accrual classes 433
 - setting up earnings codes 430
 - for donors and recipient accruals 432
 - for recipients to use transferred leave 432
 - setting up leave class rules 434
 - setting up leave transfer programs 429
 - setting up programs 428
 - updating the Additional Pay page and leave ledgers 438, 440
 - viewing accrual balances after processing payroll 443
 - viewing contributions or hours received after running the Leave Bank and Transfer process 444
 - viewing leave donations
 - to leave bank and emergency leave transfer programs 442
 - to voluntary leave transfer programs 443
 - viewing summary data for a leave transfer program 444
- leaves of absence 336
 - entering requests (USF) 401
 - entering returns from leave 337
 - tracking multiple types for one employee 337

M

- Mailing Address (USF) page 365
- Mailing Labels page 326
- Malaysia
 - assigning festive advance types 119
 - setting up religions 36
- Manage Positions business process 176
- mandates 272
- Mandates (FRA) page 272
- Marital Status (USF) page 141, 152

- maternity leave 401
- Matricula Book Calculation process 277
- Mexico
 - entering IMSS notification information 13
 - military service 272
 - Military Situation (FRA) page 272
 - multiple actions with same effective date 397
 - multiple jobs 354
 - setting up 130
 - setting up (USF) 178
 - Multiple Jobs page 354
 - multiple personnel actions 328

N

- Name History page 68, 70
- Name page 212–213
- names 70
- Nation Duvo Table (DEU) page 25–26
- Netherlands
 - complying with the SAMEN diversity law 28
 - entering SAMEN diversity information 274
 - setting up SAMEN countries 28
 - verifying the Social Security ID for Dutch employees 82
- New Zealand
 - setting up disability codes 36
- Non Pay Data (USF) page 142, 174
- nonemployees
 - fields unique to the Add Non-Employee process 126
 - hiring 125
 - setting up providers 129
 - setting up security 128
- nonpay status 174
- notes xxii
- Notification of Personnel Action (SF-50) 383

O

- occupational illness (FRA) 23
- Occupational Illness (FRA) page 22–23
- OEE Groups by Employment Type (CAN) page 266
- OEE Groups by OCC Group (CAN) page 266

- OEE Groups/Jobs Filled/Vacated (CAN)
 - page 266
- OEE Workforce Survey (CAN)
 - page 266–267
- OEE workforce survey responses 267
- OEE Workforce Survey Stats (CAN)
 - page 266
- official languages 267
- Official Languages (CAN) page 266–267
- Official List (ESP) page 345
- Original Contract Data page 183
- Other Pay Information (USF) page 142, 165
- Other Phone Numbers page 225

P

- PAR 371
 - See Also* personnel action requests (USF)
- PAR Remarks (USF) page 140, 146
- Parameters (SGP) page 326
- Parameters page - Notice of Personnel Action USF 382–383
- Parameters page - Refresh Employees Table 357
- Parameters page - Refresh Personal Data Table 357
- Parameters page - Request Personnel Action USF 382–383
- Passport/Visa Expiration page 228
- paternity leave 401
- Pay Rate Change component 351
- pay rate changes 350–351
- Payroll page 69, 106
- payroll processing data 106
- Pending Future Actions page 343
- PeopleBooks
 - ordering xx
- PeopleCode, typographical conventions xxi
- PeopleSoft application fundamentals xix
- PeopleSoft Human Resources Administer Workforce
 - integrations 7
 - prerequisites for setting up 6
 - setting up 9
 - understanding 5
- permits, *See* visas and permits
- personal data
 - changing 320
 - refreshing for accurate reporting 356
 - running reports 325
 - understanding types 323
 - updating 323
 - viewing (USF) 365
- Personal Data (USF) page 141, 147, 365
- personal data pages
 - Address History page 71
 - Identity/Diversity page 77
 - Name History page 70
 - Personal History page 72
- Personal History page 68, 72
- personal information 72
- Personal Phone Numbers (USF) page 141
- Personal Profile page 212, 216
- Personal/Job Data (ITA) page 277
- personnel action history reports 385
- personnel action reasons
 - defining 9–10
 - defining for Canadian actions 12
 - defining for German actions 12
 - understanding 9
- personnel action request (PAR)
 - process 138–139
- personnel action requests (USF) 371
 - adding and updating data 374
 - affecting employee status 394
 - authorizing and approving 379
 - automatically routing the PAR 374
 - cancellation, correction, or withdrawal 375
 - correcting or canceling actions 380
 - disapproving or returning 375
 - Human Resources processing 380
 - identifying PAR status codes and definitions 376
 - performing common 398
 - printing a Notification of Personnel Action (SF-50) 383
 - printing an action request (SF-52) 382
 - process diagram 374
 - processing actions 378
 - processing new requests 379, 391
 - requesting multiple actions with the same effective date 397
 - running reports 385
 - scheduling PAR push 378
 - searching for inconsistent PAR's 378
 - selecting a PAR status 374
 - system features 371

- tracking and routing a PAR request
 - through reviews and completion 373
 - understanding 371, 391
 - viewing employee data summaries 384
- personnel actions
 - and employee status 331
 - creating checklists for 17
- Personnel Actions History page 343
- personnel records 180, 321
- phone numbers 71
- Phone Numbers page - Personal Profile 212
- photographs 241
- PIS 50
- Position (USF) page 141, 160
- positions 85
 - assigning employees (USF) 176
 - entering (USF) 154, 160
 - hiring employees (USF) 176
 - moving an employee between 341
- preliminary employment data forms 178
- prerequisites xix
- PREV Codes (ITA) page - Company Codes 30
- PREV Codes (ITA) page - Company/Estab Codes 31
- Primary Job Audit page 345
- Print ES-931 (USF) page 386, 389
- printed documentation xx
- prior work experience 240
- Prior Work Experience page 237, 240
- probation terminations (USF) 410
- Process Leave Bank/Transfer (USF) page 435, 438, 440
- process requests
 - ad-hoc 357
 - as-of date 357
 - calendar year 357
 - from/thru dates 357
- Productive Unit (ITA) page 31
- Programa de Integração Social (PIS) 50
- promotions 334, 351
 - entering (USF) 398
- Property Value page 209–210
- protected job leave 254
- Protection (BEL) page 252, 254
- Provider Info page 129
- Push PAR to Core (USF) page 379

Q

- quoted pay 167

R

- RAIS 14, 50
- Reactivate/Termination Update page 195–196
- reassignment requests (USF) 400
- Reduced Charged Table (BEL) page 244
- rehiring employees 340, 402
- Relação Anual de Informações Sociais (RAIS) 14, 50
- related documentation xx
- Religions MYS/SGP page 36
- Religions page 17
- replacement contracts 249
- Report (BEL) page 255, 260
- responsible parties 48
- Results (BEL) page 255, 258
- retirement 338
 - entering requests (USF) 401
 - requesting supplemental/correction individual retirement records (USF) 402
- retirement date calculation (GBR) 83
- Review Notification (BEL) page 261, 263
- RSZ Category Table (BEL) page 244, 247

S

- salary changes 350–351, 398
- Salary Components page 359, 362
 - Amounts tab 362
 - Changes tab 363
 - Conversion tab 363
- salary history 362
- Salary Plan page 69, 109
- salary plans 109
- SAMEN Country Table (NLD) page 28
- SAMEN diversity information 274
 - establishing ethnic status 274
 - running the LAW SAMEN Statistics report 276
 - understanding 274
- SAMEN diversity law 28
- SAMEN Registration (NLD) page 274
- Scheme (ESP) page 38, 40
- Search by National ID page 180–181
- security
 - departmental reassignments (USF) 400

- employee data (USF) 398
- for intercompany transfers (shukkou) 316
- setting up for tracking additional appointments 290
- updating job data 330
- Security Info (USF) page 142, 175
- SEFIP 50
- Select Data page - Notice of Personnel Action USF 382
- Select Data page - Request Personnel Action USF 382
- seniority for Claeys Formula calculations 252
- Seniority Notification (ITA) page 31, 33
- seniority notification periods 33
- severance calculations 251, 258
- Severance Pay (USF) page - Setup Wage/Separation USF 386, 388
- SF-75 Run Control (USF) page 178
- SF61 Report (USF) page 178
- shukkou, *See* intercompany transfers (shukkou)
- SI Unit (DEU) page 26
- Signature Date/Probation Info page 183, 193
- Singapore
 - assigning festive advance types 119
 - setting up religions 36
- Sistema Empresa de Recolhimento do FGTS e Informações à Previdência Social (SEFIP) 50
- Soc Sec Risk Code (ESP) page 38–39
- Social Insurance Numbers 82
- Social Report (BEL) page 264
- social security (ESP)
 - defining bases 41
 - defining contribution rates and percentages 43
 - defining maximum and minimum ceilings 40
 - entering country codes for reporting 39
 - viewing risk codes 39
- Social Security Country Codes (ESP) page 38–39
- Social Security ID 82
- social security tracking codes 22
- Spain
 - defining hiring centers 46
 - entering company information 45

- entering country codes for social security reporting 39
- entering insurance company information 39
- generating AFI flat files 268
- setting up social security 39–41, 43
- setting up workforce tables 36
- standard contracts 185
- Statute Table (BEL) page 244, 246
- substantial presence test 282
- Substantial Presence Test (USA) page 282
- suggestions, submitting xxiii
- supervisor levels (JPN) 34
- Supervisor Request (USF) component 373
- Supporting Documents Table page 16
- Switzerland
 - running the Company Statistics report 268

T

- tables
 - setting up Administer Workforce 2
 - setting up country-specific 3, 21
 - setting up HRMS fundamentals 2
- Temp Assignment w/out End Date page 195
- Temp Assignmt Due to Complete page 195
- temporary assignments 194
 - entering 196
 - partial 197
 - running the update process 196
 - understanding 194
- Temporary Employees page 344
- tenure conversions (USF) 411
 - career-conditional conversions 413
 - process overview 411
 - understanding 412
 - viewing supervisor notifications 412
- terminations 338, 401
 - due to death 339
 - requesting terminations due to death (USF) 402
 - running probation termination automatic actions (USF) 410
 - using workflow 338
- terms 447
- Time and Labor Data (USF) page 142
- transfers 335

transfers, leave, *See* leave transfers (USF)
 Turnover Action (ITA) page 31
 typographical conventions xxi

U

union membership 106
 United Kingdom
 entering an employee's building society
 roll number and name 235
 entering banking information 233
 understanding the retirement date
 calculation 83
 United States
 determining residency status for foreign
 nationals 282
 entering COBRA action reason data 13
 reviewing union membership 106
 United States Federal
 administering automatic leave
 enrollment 419
 See Also automatic leave enrollment
 (USF)
 administering personnel action
 requests 371
 See Also personnel action requests
 (USF)
 administering probation terminations
 with automatic actions 410
 administering tenure conversions 411
 See Also tenure conversions (USF)
 administering within-grade
 increases 413
 defining award actions 14
 employee data security
 considerations 398
 generating a wage and separation
 report 385
 See Also ES-931
 hiring employees 137
 initiating and requesting personnel
 actions 379
 managing leave transfer programs
 See Also leave transfers (USF)
 administering leave donations 434
 administering leave recipients 438
 setting up leave transfer
 programs 428
 viewing leave transfer data 441
 modifying addresses 325

printing appointment affidavits
 and preliminary employment data
 forms 178
 processing automatic actions 405
 See Also automatic actions (USF)
 processing personnel action
 requests 391
 understanding workflow 373
 updating emergency contact
 addresses 325
 using the Personnel Action Request
 (PAR) process to hire employees 138
 viewing employee benefit
 programs 367
 viewing employee data summaries 384
 viewing job data 366
 viewing personal data 365
 update components 320, 326
 updating employee data
 hiring versus updating 53
 USF, *See* United States Federal (USF)

V

veterans 151
 Veterans Info (USF) page 141, 151, 365
 Visa/Permit Data page 228–229
 Visa/Permit Table page 16
 visas, *See* visas and permits
 visas and permits 227
 defining 16
 entering 229
 entering for dependents 224
 tracking 228
 visual cues xxii
 VLTP 420
 Voluntary Leave Transfer Program 420
 volunteer activities 235
 Volunteer Activities page 236
 Volunteer Organization Table page 17

W

Wage and Separation report (USF) 385
 warnings xxiii
 WBEAA Data - NLD page 274, 276
 WGI, *See* within-grade increases
 WGI Action (USF) page 409
 WGI Notice (USF) page 409
 within-grade increases
 administering for US Federal use 413

- creating supervisor notifications 416
- entering data that affects WGI automatic actions 417
- process overview 415
- running the Load Within Grade Increases process 409
- understanding 60 day WGI notices 414
- understanding the Load Within Grade Increases process 414
- viewing supervisor notifications 416
- work eligibility 77
- work experience 240
- Work Group (ESP) page 38, 41
- Work Location page 69, 85
- work permits and visas 16
 - See Also* visas and permits
- workflow 57
 - for personnel action requests (USF) 373
 - maintaining job data 333
 - terminating employees 338
 - updating employee addresses 324
- workforce administration 5
- workforce information
 - understanding how to update 319
 - updating 319
 - viewing 359

Y

- Years of Service page 344