



PeopleSoft 8.8 Human Resources PeopleBook: Administer Salaries for The Netherlands

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Administer Salaries for The Netherlands
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About This PeopleBook

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

This preface discusses:

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

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

PeopleSoft Application Fundamentals for HRMS PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft HRMS product line. No matter which PeopleSoft HRMS products you are implementing, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook

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.

Chapters	Description
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.
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.

Chapters	Description
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 Salaries for The Netherlands

This chapter provides an overview of PeopleSoft Human Resources Administer Salaries for The Netherlands and discusses:

- PeopleSoft Human Resources Administer Salaries for The Netherlands business processes.
- PeopleSoft Human Resources Administer Salaries for The Netherlands implementation.

PeopleSoft Human Resources Administer Salaries for The Netherlands Overview

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

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

Note. The Administer Salaries for The Netherlands functionality has been designed primarily for customers using PeopleSoft Human Resources with PeopleSoft Payroll Interface. If you are using PeopleSoft Global Payroll for The Netherlands, you should use the designated functionality found in PeopleSoft Global Payroll for The Netherlands. This includes setup and assignments for earnings and deductions, enrollment into benefits, and setup and administering for social insurance and tax data. Information on how to set up and administer these business processes can be found in the PeopleSoft Global Payroll for The Netherlands PeopleBook.

If you are using PeopleSoft Human Resources Administer Salaries for The Netherlands, you will set up the designated functionality through Set Up HRMS, Product Related, Benefits NLD. You'll administer the functionality through Workforce Administration, Benefits Information NLD.

If you are using PeopleSoft Global Payroll for The Netherlands, you will set up the designated functionality through Set Up HRMS, Product Related, Global Payroll. You'll administer the functionality through Global Payroll.

See Also

PeopleSoft 8.8 Global Payroll for The Netherlands PeopleBook, “Defining Country Data for The Netherlands”

PeopleSoft Human Resources Administer Salaries for The Netherlands Business Processes

The following are the business processes used for PeopleSoft Human Resources Administer Salaries for The Netherlands:

- Record earnings and payments.
- Record benefits and deductions.

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

PeopleSoft Human Resources Administer Salaries for The Netherlands Implementation

The PeopleSoft Human Resources Administer Salaries for The Netherlands table-loading implementation can be divided into three areas: global, core, and additional. However, the selections and order may vary depending on the applications you implement and the features you use. Set up tables to enable your system to support Administer Salaries for The Netherlands.

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

This section includes tables that guide you through these phases for PeopleSoft Human Resources Administer Salaries for The Netherlands:

- Setting up global application tables.

- Setting up core application tables.

Setting Up PeopleSoft HRMS Global Application Tables

PeopleSoft Human Resources Administer Salaries for The Netherlands requires the setup of global HRMS tables.

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

Setting Up Core PeopleSoft Human Resources Administer Salaries for The Netherlands Tables

The steps discussed in this section suggest an order in which to define your core PeopleSoft Human Resources Administer Salaries for The Netherlands tables.

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

- Record earnings and payments.
- Record benefits and deductions.

Step	Reference
1. Define company earnings and payment parameters.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Defining Earnings and Payments, page 11
2. Define salary plans.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Defining Earnings and Payments, page 11
3. Define salary grades.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Defining Earnings and Payments, page 11
4. Establish earnings codes.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Defining Earnings and Payments, page 11
5. Define work shift data.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Defining Earnings and Payments, page 11
6. Define earnings programs.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Defining Earnings and Payments, page 11
7. Define benefit provider data.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Defining Benefits and Other Deductions, page 17

Step	Reference
8. Define benefit policy data.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Defining Benefits and Other Deductions, page 17
9. Define deduction codes.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Defining Benefits and Other Deductions, page 17
10. Define general deductions.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Defining Benefits and Other Deductions, page 17
11. Define benefit plans.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Understanding Benefit Plans, page 18
12. Define benefit coverage codes.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Understanding Benefit Plans, page 18
13. Associate benefit programs with plan types, rates, and calculate values.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Understanding Benefit Plans, page 18
14. Define scheduled holidays.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Organizing Your Payroll Processes, page 32
15. Define company banking institutions.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Organizing Your Payroll Processes, page 32
16. Define account codes for tracking company payments and expenses.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Organizing Your Payroll Processes, page 32
17. Define pay groups and pay group processing parameters.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Organizing Your Payroll Processes, page 32
18. Establish the pay run IDs in order to combine pay calendar entries from different pay groups for payroll processing.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Organizing Your Payroll Processes, page 32
19. Establish payroll cycles for pay groups.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Organizing Your Payroll Processes, page 32
20. Define company leave plans.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Establishing Additional Benefits Features, page 40
21. Define company pension plans.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Establishing Additional Benefits Features, page 40

Step	Reference
22. Define insurance rate codes.	<u>Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Establishing Additional Benefits Features, page 40</u>
23. Define coverage group codes for life insurance and accidental death and dismemberment insurance programs.	<u>Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Establishing Additional Benefits Features, page 40</u>

CHAPTER 2

Understanding PeopleSoft Human Resources Administer Salaries for The Netherlands

This chapter provides an overview of PeopleSoft Human Resources Administer Salaries for The Netherlands and discusses:

- Administer Salaries for The Netherlands business processes.
- Administer Salaries for The Netherlands integrations.

PeopleSoft Human Resources Administer Salaries for The Netherlands

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

Note. The Administer Salaries for The Netherlands functionality has been designed primarily for customers using PeopleSoft Human Resources with PeopleSoft Payroll Interface. If you are using PeopleSoft Global Payroll for The Netherlands, you should use the designated functionality found in PeopleSoft Global Payroll for The Netherlands. This includes setup and assignments for earnings and deductions, enrollment into benefits, and setup and administering for social insurance and tax data. Information on how to set up and administer these business processes can be found in the PeopleSoft Global Payroll for The Netherlands PeopleBook.

If you are using PeopleSoft Human Resources Administer Salaries for The Netherlands, you will set up the designated functionality through Set Up HRMS, Product Related, Benefits NLD. You'll administer the functionality through Workforce Administration, Benefits Information NLD.

If you are using PeopleSoft Global Payroll for The Netherlands, you will set up the designated functionality through Set Up HRMS, Product Related, Global Payroll. You'll administer the functionality through Global Payroll.

See Also

PeopleSoft 8.8 Global Payroll for The Netherlands PeopleBook, “Defining Country Data for The Netherlands”

Administer Salaries for The Netherlands Business Processes

PeopleSoft Human Resources Administer Salaries for The Netherlands supports the following business processes:

- Record earnings and payments.

Collect information about payments to employees (such as regular salary and related additional earnings) needed to process payroll. You can also enter payroll-related information about employee bank and account information.

- Record benefits and deductions.

Enter payroll-related data about employee benefits and deductions, which are processed from the employee's pay. This includes permanent benefits deductions (such as contributions to a health insurance or pension program) and related general deductions (such as the settlement of a cash advance).

Administer Salaries for The Netherlands 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.

We cover integration considerations in this PeopleBook.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Understanding Enterprise Integration Points in HRMS"

CHAPTER 3

Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands

This chapter provides an overview of prerequisites, common elements, and terminology and discusses how to:

- Define earnings and payments.
- Define benefits and other deductions.
- Organize your payroll processes.
- Establish additional benefits features.
- Specify employee bank information.

Understanding Prerequisites, Common Elements, and Terminology

This section discusses:

- Prerequisites.
- Common elements used in this chapter.
- Terminology.

Prerequisites

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

- Enter employee personal and job data.
- Enter any companies for which you plan to run payroll, along with their employer tax identification numbers and default pay groups.
- Create the appropriate salary plans and grades for your companies on the Salary Plan and Salary Grade tables.

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

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce”

PeopleSoft 8.8 Human Resources PeopleBook: Plan Salaries, “Setting Up Plan Salaries”

Common Elements Used in This Chapter

Incidental	Select if the payments or deductions cover a closed time period, with a one-time payment or deduction.
Permanent	Select if the payments or deductions cover a time period with an initial and final date, but where the final date is open and the payment or deduction continues indefinitely until the final date is closed.
Both	Select if the payments or deductions are incidental and permanent.
WT, SS (wage taxes, Social Security)	Select if the tax class for this earnings code is for wage taxes, Social Security premiums.
WT, NoSS (wage taxes, no Social Security)	Select if the tax class for this earnings code is for wage taxes, no Social Security premiums or doesn't apply.
NoWT, SS (no wage taxes, Social Security)	Select if the tax class for this earnings code is for no wage taxes or doesn't apply, Social Security premiums.
NoWT, NoSS (no wage taxes, no Social Security)	Select if the tax class for this earnings code is for no wage taxes or doesn't apply, no Social Security premiums or doesn't apply.

Terminology

The following table defines the terminology used throughout PeopleSoft Human Resources Administer Salaries for The Netherlands and this documentation:

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

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

Defining Earnings and Payments

This section provides overviews of earnings and earnings programs and discusses how to:

- Enter information about your earnings methods.
- Define the adjustment factors and tax classes for your earnings code.
- Set up earnings programs.
- Establish work shifts and define shift differential pay.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce”

Understanding Earnings

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

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

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

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

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

Understanding Earnings Programs

An earnings program is a set of valid earnings codes for one or more pay groups. A single company may have any number of earnings programs. An individual employee may belong to only one earnings program, based upon the individual's pay group, and the codes for that program are the only valid earnings codes for that employee.

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

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

Pages Used to Define Earnings and Payments

Page Name	Object Name	Navigation	Usage
Earnings Table 1	EARNINGS_TABLE1_NL	Set Up HRMS, Product Related, Benefits NLD, Earnings Table, Earnings Table 1	Establish earnings codes and enter information about your earnings methods.
Earnings Table 2	EARNINGS_TABLE3_NL	Set Up HRMS, Product Related, Benefits NLD, Earnings Table, Earnings Table 2	Define the adjustment factors and tax classes for your earnings code. Your payroll system can use the adjustment factors and limits that you enter on this page to adjust calculations for earnings codes.
Earnings Program Table	EARN_PROG_TBL_NLD	Set Up HRMS, Product Related, Benefits NLD, Earnings Program Table	Set up an earnings program.
Shift Table	SHIFT_TABLE	Set Up HRMS, Product Related, Benefits NLD, Shift Table	Set up work shifts for your company and define shift differential pay if you have work shifts and if shift differential pay is provided to your employees.
Run Control	PRCSRUNCNTL	Set Up HRMS, Product Related, Benefits NLD, Reports, Earnings	Use the Earnings report (INT004NL) to review all the valid earnings codes that you entered into the system, along with the payroll calculation characteristics that you assign to each.

Entering Information About Your Earnings Methods

Access the Earnings Table 1 page.

Earnings Table 1 | **Earnings Table 2**

Earnings Code: A05

Table 1 Details Find | View All First 1 of 1 Last

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

***Description:** Admin Uncontrollable OT 5%

Short Description: AUO 05%

Permanent/Incidental	Payment Type
☐ Incidental	☐ Flat Amount
☐ Permanent	☐ Unit/Override Rate
☐ Both	☐ Hours Only
	☐ Amounts Only
	☐ Defined by Salary System
	☐ Both Hours and Amount OK
	☒ Either Hours or Amount OK

Earnings Table 1 page

Payment Type

Flat Amount

Select to define an earnings code as a flat amount and also specify the amount. For example, you want to give multiple employees a specific flat amount of additional pay. You can maintain this type of flat amount and make mass changes to the flat amount on the Earnings table, instead of changing multiple additional pay records at the employee level.

Unit/Override Rate

Select and specify a rate if you want to set up your payroll system to override the hourly rate on the employee's job record, or if you want to provide an earnings code for piecework earnings.

Hours Only

Select if you want to enable the entry of hours for earnings.

Amounts Only

Select if you want to enable the entry of amounts for earnings.

Defined by Salary System

Select if a third-party payroll system defines the way to process the payment for earnings.

Both Hours and Amount OK

Some companies need the ability to enter both hours and an amount for earnings. Select this option to record an employee's hours (for your records only) and to enter the actual amount of pay that you want the employee to receive.

Either Hours or Amount OK

Select if you want to enable the entry of either hours or amount, but not both, for earnings.

Defining the Adjustment Factors and Tax Classes for Your Earnings Code

Access the Earnings Table 2 page.

Earnings Table 1 **Earnings Table 2**

Table 2 Details Find | View All First 1 of 1 Last

Earnings Code: A05 Admin Uncontrollable OT 5%

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

Rate Adjustment Factor:

Hours Adjustment Factor:

Multiplication Factor:

Earnings Adjustment Factor:

Maximum Yearly Earnings:

Tax Class

- ☒ WT, SS
- ☐ WT, NoSS
- ☐ NoWT, SS
- ☐ NoWT, NoSS

Earnings Table 2 page

Rate Adjustment Factor

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

Hours Adjustment Factor

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

Multiplication Factor

To calculate hourly earnings, such as overtime or double time, for which a specific number or factor (such as 1.5 or 2.0 for double time) multiplies the earnings for overtime.

Earnings Adjustment Factor

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

Maximum Yearly Earnings

Enter a value to set a yearly ceiling on the earnings code.

Setting Up an Earnings Program

Access the Earnings Program Table page.

Earnings Program Table

Earnings Program ID: B01

Earnings Details Find | View All First 1 of 1 Last

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

***Description:** All Employees

Short Description: All emps

Earnings Code Customize | Find | View All First 1-6 of 47 Last

*Earnings Code	Description		
B43	B - Automobile Allowance		
B44	B - Adjustments		
B45	B - Vacation Adjustment		
B46	B Award- Non Cash		
B47	B - Bonus		
B49	B - Boots Payment		

Earnings Program Table page

Earnings Code

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

Setting Up Work Shifts and Defining Shift Differential Pay

Access the Shift Table page.

Shift Table

SetID: SHARE Table Set shared across Corp

Shift: 1

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

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

Description: Shift 1 - ee level

Short Description: Shift 1

Time In Hour: 8 **Time In Minute:** to **Time Out Hour:** 17 **Time Out Minute:**

Employee Shift Differential?

☒ Specified at Employee level

Rate:

Factor:

Shift Table page

Time In Hour, Time In Minute, Time Out Hour and Time Out Minute

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

Specified at Employee level

If shift premiums vary from employee to employee, select this check box, which enables you to define the shift premium rate or factor for employees assigned to the shift at the employee level.

Rate

If you didn't select Specified at Employee Level, enter the rate. At the employee level, use the Shift/Rate/Factor fields on Job Data - Job Information page.

Factor

If you didn't select Specified at Employee Level, enter the factor. At the employee level, use the Shift/Rate/Factor fields on Job Data - Job Information page.

Defining Benefits and Other Deductions

This section provides overviews of benefit plans, benefit programs, and deductions and discusses how to:

- Set up permanent and incidental deductions for tax purposes.
- Set up general deduction data.
- Set up company general deductions.
- Set up benefit plan definitions.
- Create benefit coverage codes.

- Set up basic benefit program data.
- Link benefits programs to plan types.
- Link benefits programs to rate and calculate values.
- Use the Benefit Program Clone utility.

Understanding Benefit Plans

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

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

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

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

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

Plan Type Numbers	Plans
10–19, 1A–1Z	Health plans
20–29, 2A–2Z	Life insurance plans
30–39, 3A–3Z	Disability plans
40–49, 4B–4Z	Savings plans
4A	Employee stock purchase plans (ESPPs)
50–59, 5B–5Z	Leave plans
5A	Company car (European organizations only)
60–69, 6A–6Z	Flexible spending account plans (U.S. and Canada)
70–79, 7A–7Z	Retirement plans (U.S.)

Plan Type Numbers	Plans
80–89, 8A–8Z	Pension plans (U.S. and Canada)
90–99, 9A–9Z	Vacation buy/sell plans

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

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

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

Plan Type	Description	Plan Type	Description
25	Dependent life	81	Supplementary pension (Canadian)
26	Survivor income	82	USDB Pension Plan 1
30	Short-term disability	83	USDB Pension Plan 2
31	Long-term disability	84	USDB Pension Plan 3
40	401(K)	85	USDB Pension Plan 4
41	Profit sharing	86	USDB Pension Plan 5
42	Thrift	87	USDB Pension Plan 6
43	IRA	90	Vacation buy
44	Capital accumulation	91	Vacation sell
45	U.S. Savings Bonds		

The first step in defining a benefit plan is to name the plan and identify the plan type through the Benefit Plan table.

See Also

[Chapter 5, “Entering Benefits and Deductions,” page 59](#)

Understanding Benefit Programs

A benefit program is a set of benefits and deductions that is valid for an employee or group of employees. A single company may have any number of programs, and an employee with concurrent jobs may have multiple benefit programs. Therefore, when you set up a benefit program, you are defining which benefits and deductions are valid for the employees enrolled in the program.

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

Understanding Deductions

Deductions comprise all payroll deductions for benefit plans and other general payments, not including taxes. There are two basic types of deductions: benefits deductions and general deductions. In PeopleSoft Human Resources, a general deduction is a deduction (permanent or incidental) that isn't a benefit deduction. Charitable deductions, union dues, parking fees, garnishments, and bonds all fit into this category. Refer to deductions for taxes as *taxes*. When setting up deductions in PeopleSoft Human Resources, remember that there are two parts to defining a deduction.

To define a deduction:

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

Use the General Deduction Table page for non-benefit deductions, such as parking fees, union dues, or garnishments. This page contains the codes that classify all payroll deductions that do not fit into a category covered by one of the Benefits tables, such as loan payments, cash, advance settlements, union dues, and parking fees.

Use the Benefits tables for benefit deductions, such as those for medical and life insurance plans.

For each entry on the General Deduction Table page or in the Benefits table, there should be a corresponding entry on the Deduction Table page.

The PeopleSoft Human Resources system provides two Structured Query Reports (SQRs) for reviewing the valid deduction codes that are entered into the system.

The Deductions report (INT005NL) provides an overview of the different deductions defined in the system. This SQR is sorted by plan type, deduction code, and effective date. It prints the classification codes that you set up for each plan type on the Deduction Table page.

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

See Also

[Chapter 5, “Entering Benefits and Deductions,” Entering Data for General Deductions, page 77](#)

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Setting Up Vendors”

Pages Used to Define Benefits and Other Deductions

Page Name	Object Name	Navigation	Usage
Deduction Table	DEDUCT_TABLE1_NL	Set Up HRMS, Product Related, Benefits NLD, Deduction Table	Specify, for all benefits deductions and general deductions, whether a deduction is permanent or incidental and how the deduction affects taxes.

Page Name	Object Name	Navigation	Usage
General Deduction Table	GENL_DEDUCT_TBL_NL	Set Up HRMS, Product Related, Benefits NLD, General Deduction Table	Define how nonbenefit deductions are calculated. These deductions include parking fees, union dues, or garnishments. (For benefit deductions, use one of the Benefits tables.)
Company General Deductions	GDED_COM_TBL	Set Up HRMS, Product Related, Benefits NLD, Company General Deductions	Define the grouping of General Deductions which are valid for a specific company.
Vendor Information	VNDR_ID1	Set Up HRMS, Product Related, Benefits NLD, Provider/Vendor Table, Vendor Information	Add a new provider.
Addresses	VNDR_ADDRESS	Set Up HRMS, Product Related, Benefits NLD, Provider/Vendor Table, Addresses	Add an address for a new provider.
Benefit Plan Table	BENEFIT_PLAN_TABLE	Set Up HRMS, Product Related, Benefits NLD, Benefit Plan Table	Add a benefit plan definition. Also define providers, provider codes, and default deduction codes for all plan types.
Coverage Code Tbl (coverage code table)	COVRG_CD_TBL	Set Up HRMS, Product Related, Benefits NLD, Coverage Codes, Coverage Code Tbl	Add new coverage codes for your benefit programs. PeopleSoft suggests that you give the coverage code a numerical values of one through seven. Coverage codes should be ordered according to their complexity, with Employee Only being first.
Benefit Program	BEN_PROG_DEFN1	Set Up HRMS, Product Related, Benefits NLD, Benefit Program Table, Benefit Program	Define basic benefit program information.
Plan Type and Option	BEN_PROG_DEFN2	Set Up HRMS, Product Related, Benefits NLD, Benefit Program Table, Plan Type and Option	Link plan types to the benefit program and add important information about plan types.
Cost	BEN_PROG_DEFN3	Set Up HRMS, Product Related, Benefits NLD, Benefit Program Table, Cost	Link a benefit program and plan type to rate and calculate rules. Use the outer scroll arrow to enter information about more than one plan type.

Page Name	Object Name	Navigation	Usage
Benefits Clone	BN_CLONE	Set Up HRMS, Product Related, Benefits NLD, Clone Benefit Program, Benefits Clone	Identify a benefit program and have the system make an exact copy of that program with a different effective date. Give the duplicate program the same name as the original or rename it, which saves you time and effort when you create a new benefit program with a future effective date.

Setting Up Permanent and Incidental Deductions for Tax Purposes

Access the Deduction Table page.

Deduction Table

Plan Type: 00 General Deduction Deduction Code: B00-03

Deduction Details Find | View All First 1 of 1 Last

*Effective Date: 01/01/1980

*Description: Travel Advance

Short Description: Travel Adv

Permanent/Incidental

☐ Incidental

☐ Permanent

☒ Both

Tax Class

☒ WT, SS

☐ WT, NoSS

☐ NoWT, SS

☐ NoWT, NoSS

Deduction Table page

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

Setting Up General Deduction Data

Access the General Deduction Table page.

General Deduction Table

Deduction Code: CA28BL
Description: Board & Lodging Ben - Bx28T4A

Deduction Details Find | View All First 1 of 1 Last

***Effective Date:** 01/01/1980 [Calendar Icon]

Deduction Rate or %: [Text Field]

Deduction Calculation Routine + -

- ☒ Flat Amount
- ☐ Percentage
- ☐ Calculated by Salary System

Amount Per Pay Period Find | View All First 1 of 1 Last

***Pay Frequency:** D [Search Icon] Daily + -

Deduction Flat/Addl Amount: [Text Field]

General Deduction Table page

Deduction Calculation Routine

For each general deduction, indicate the type of deduction calculation routine that your payroll system uses to determine the amount of the deduction. If you select a deduction calculation routine that uses a deduction rate or percent, also enter a flat/additional amount per pay period to be deducted. However, you must indicate the amount here only if it's the same for all employees within a pay frequency.

Flat Amount

Select if the deduction calculation is for a flat amount. Enter the amount in the Deduction Flat/Addl Amount (deduction flat/additional amount) field.

Percentage

Select if the deduction calculation is for a percentage. Enter the percentage in the Deduction Rate or % (deduction rate or percent) field.

Calculated by Salary System

Select if the deduction is calculated by the payroll system.

Amount Per Pay Period

This group box displays the amount to be deducted from an employee's pay every pay period.

Pay Frequency

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

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

If you select a deduction calculation routine that uses a flat amount, enter a flat amount or additional deduction amount. However, indicate the amount here only if it's the same for all employees within a pay frequency.

Setting Up Company General Deductions

Access the Company General Deductions page.

Company General Deductions

Company: KN1 Business Institute Netherlands

Company General Deductions Find | View All First 1 of 1 Last

*Effective Date: 01/01/1980

Deductions		Customize Find View All First 1-5 of 5 Last	
*Deduction Code	Description		
KN0001	Staff Association Contribution	+	-
KN0002	Stock Purchase	+	-
KUCHLD	Child Care Center-On Site	+	-
KUHLTH	Health Club Dues	+	-
KUPRKG	Parking	+	-

Company General Deductions page

Deduction Code Select deduction codes that are applicable for your company. Deduction codes are created on the Deduction Code Table.

Setting Up Benefit Plan Definitions

Access the Benefit Plan Table page.

Benefit Plan Table			
Plan Type:	10	Medical	Benefit Plan: BNFTE
Benefit Plans Find View All First 1 of 1 Last			
*Effective Date:	01/01/1980		
*Description:	BNFTE	Short Description:	BNFTE
SetID:	BNUSA	Vendor ID:	BNFTE
Group Number:		SPD URL ID:	
Default Deduction Code:			
Pay Mode			
Pay Mode:	Pay as Deducted		
AP Payment Date Type:	Check Date		
Self-Service Plan Description:			
Internal Administrative Contacts First 1 of 1 Last			
	*Contact Type	*Contact ID	Contact Description
1			

Benefit Plan Table page

- SetID** Select a set ID for the vendor to be used.
- Vendor ID** If the provider is not on the list, use the Provider/Vendor Table to add it.
- Group Number** Defined on the Provider Policy Table.
- SPD URL ID** (summary plan description uniform resource locator identification) PeopleSoft eBenefits provides access to the summary plan description on the Provider Policy Table.
- Default Deduction Code** (Optional) Enter a default code here to save you from typing the deduction code each time that you associate this benefit plan with a benefit program on the Benefit/Deduction Program Table. (Deduction codes are created on the Deduction Table page.)
- Pay Mode** Fields in this group box are for use with PeopleSoft Payroll for North America only.
- Self-Service Plan Description** Use only for health (1x), disability (3x), leave (5x), and retirement (7x) plans. Enter text describing the benefit plan that will also appear on PeopleSoft eBenefits pages.

See Also

Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,”
 Defining Benefits and Other Deductions, page 17

Creating Benefit Coverage Codes

Access the Coverage Code Tbl page.

Coverage Code Tbl page

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

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

Dependent Coverage

Indicate whether spouses and dependents are not allowed, or required by this coverage code.

Dependent Only Allowed: The delivered coverage codes allow the participant to have a dependent only, but no spouse.

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

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

Spouse Only Allowed: The delivered coverage codes allow the participant to have a spouse, but no dependents.

Spouse Required: The delivered coverage codes require the participant to have a spouse.

Sps + Deps Only Allowed (spouse and dependents only): The delivered coverage codes allow the participant to have spouse and dependents only.

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

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

Non Qualified Dep

Coverage (non-qualified dependent coverage)

Not used for operations in the Netherlands.

Setting Up Basic Benefit Program Data

Access the Benefit Program page.

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

Benefit Program page

Program Type

The program type is set when you first build the benefit program. Set this field to *Manual*.

When you create the benefit program, use PeopleSoft Benefits Administration in association with PeopleSoft Human Resources Manage Base Benefits and have the Benefits Administration option selected in the Installation table, set the Program Type field to *Automated*.

Currency Code

The type of currency the program uses for this program's benefit and deduction calculations.

Dependent Age Limit

Enables you to set a maximum age limit that, once reached, indicates that a dependent is no longer eligible for coverage.

Student Age Limit

Enables you to set a maximum age limit that, once reached, indicates that a dependent can no longer be covered by student status.

Exclude Disabled from Age Lmt. (exclude disabled from age limit)

Enables you to exclude disabled dependents from the maximum dependent limits.

Dep Ineligible if Married
(dependent ineligible if married)

Indicates that dependents who are married aren't eligible for coverage under the benefits program.

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

Linking Benefits Programs to Plan Types

Access the Plan Type and Option page.

Plan Type and Option page

Plan Type

Plan Type

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

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

Waive Coverage

Select this check box if the plan type allows it.

Option

Optn ID (option ID)

As you define options for each of the offered plan types, the system automatically enters the option ID.

Optn Type (option type) Each row must have an option type designation. The option type that you select determines the remaining fields that you must complete on the Benefit/Deduction Program Table pages.

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

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

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

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

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

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

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

Deductn Cd (deduction code) Indicate how to handle deductions.

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

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

Linking Benefits Programs to Rate and Calculate Values

Access the Cost page.

Cost page

Option ID	The option ID information that you entered for each plan type. For each plan type, use the scroll arrows to navigate between the option IDs.
Option Type	The option type information that you entered for each plan type.
Benefit Plan	The benefit plan information that you entered for each plan type.
Coverage Code	The coverage code information that you entered for each plan type.
Cost Type	Enter a cost type: <i>Price</i> , <i>Credit</i> , or <i>None</i> .
Rate Type	Enter a rate type to specify which table should be used to determine rates for the plan type.

Important! The Rate TblID (rate table ID), Earn Code (earnings code), Cost ID, and Calc TblID (calculate table ID) fields are all used for PeopleSoft Benefits Administration and are not for operations in the Netherlands.

Using the Benefit Program Clone Utility

Access the Benefits Clone page.

Benefits Clone

*Object Type to Clone: Benefit Program

Copy From

Selected	Benefit Program	Description	Effective Date	Status
☐	B01	BAS Eligibility 1	01/01/1998	A
☐	B01	BAS Eligibility 1	01/01/1990	A
☐	B02	BAS Eligibility 2	01/01/1990	A
☐	B03	BAS Eligibility 3	01/01/1990	A

Copy To

Benefit Program: Effective Date:

*Program Type: Manual

Clone

Benefits Clone page

Copy From

Benefit Programs Select the benefit programs you want to duplicate.

Copy To

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

Effective Date	Enter the effective date for the benefit program that you are creating.
Clone	Click this button to run this request. Process Scheduler runs the benefit program clone process at user-defined intervals.

Organizing Your Payroll Processes

This section provides an overview of pay groups and pay group setup and discusses how to:

- Identify bank codes.
- Define holiday schedules.
- Create and maintain pay groups.
- Set up pay groups for salary administration.
- Set up pay run IDs.
- Create pay calendars.

Understanding Pay Groups and Pay Group Setup

When you implement PeopleSoft Human Resources, one of the major decisions is which pay groups to set up. A pay group gathers a set of employees for payroll processing. Your PeopleSoft Human Resources system provides an SQR, the Pay Groups report, so that you can review an overview of the valid pay groups in the system.

Before grouping people into pay groups, consider that all employees must:

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

For example, when setting up pay groups for a fictional company, GBI, group employees as follows:

KN1—Monthly	Employees who are paid monthly and share the same pay period, which ends on the last day of the month, may belong to the same pay group. Salaried employees at GBI are paid monthly.
--------------------	--

KN2—Semi-Monthly

Employees who are paid semimonthly and share the same pay periods, ending on the 15th and last day of the month, may also belong to the same pay group. Exception hourly and hourly employees at GBI are paid semimonthly.

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

Important! The Pay Group Table pages in the system, located outside PeopleSoft Human Resources Administer Salaries for The Netherlands, aren't identical to the Pay Group Table pages used for The Netherlands. There are distinct differences in the fields. For users of PeopleSoft Human Resources Administer Salaries for The Netherlands, it is important that you use the Pay Group Table pages that appear on the Benefits NLD menu.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Setting Up Organization Foundation Tables,” Entering Company Information

Pages Used in Organizing Your Payroll Process

Page Name	Object Name	Navigation	Usage
Bank Table	BANK_EC	Set Up HRMS, Common Definitions, Banking, Banks, Bank Table	Identify every bank and savings institution where your company has accounts established for payroll purposes, with the exception of employee's direct deposit accounts.
Branch Table	BANK_BRANCH_EC	Set Up HRMS, Common Definitions, Banking, Banks, Branch Table	Identify bank branches for your company.
Account Code Table	ACCT_CD_TABLE	Set Up HRMS, Common Definitions, Payroll, Account Code Table	Assign unique account codes that you can reference in your payroll system and track the distribution of your organization's payments and expenses against budgeted accounts. If you plan to implement extensive account reporting, this table may be large.

Page Name	Object Name	Navigation	Usage
Holiday Schedule Table	HOLIDAY_SCHED_TBL	Set Up HRMS, Common Definitions, Payroll, Holiday Schedule, Holiday Schedule Table	Establish a list of scheduled holidays that can be used on the Pay Group table. Holiday schedules that you set up through either navigation can be passed on to a third-party payroll system. Do not include personal floating holidays on this list. Because holidays may vary for different segments of your employee population, depending on location, work schedules, or other factors, you can set up as many holiday schedules on this table as needed.
Pay Group Table - Definition	PAYGROUP_TABLE1	Set Up HRMS, Product Related, Benefits NLD, Pay Group Table, Definition	Create or maintain pay groups.
Pay Group Table - Calc Parameters (pay group table - calculation parameters)	PAYGROUP_TBL3_GBL	Set Up HRMS, Product Related, Benefits NLD, Pay Group Table, Calc Parameters	Enter additional pay group processing parameters, including the bank and account, net pay minimums and maximums, and valid earnings codes. When you first add a pay group, a dialog box prompts you for a company ID and pay group ID. The company ID is a key field on the Pay Group table, implying that all employees in a pay group are also in the same company. For the pay group ID, use any three-character alphanumeric ID that conforms to your payroll system standards.
Pay Run Table	PAY_RUN_TABLE_NLD	Set Up HRMS, Product Related, Benefits NLD, Pay Run Table	Establish the valid pay run IDs that you use to combine pay calendar entries from different pay groups for payroll processing. The Pay Run Table page and procedures for establishing pay run IDs are the same for several other PeopleSoft Payroll applications.

Page Name	Object Name	Navigation	Usage
Pay Calendar Table	PAY_CAL_TBL_NLD	Set Up HRMS, Product Related, Benefits NLD, Pay Calendar Table	Schedule payroll cycles for your pay groups and specify when pay periods begin and end. You must have a calendar entry for every pay period for each pay group that you set up. Each entry on the Pay Calendar Table page corresponds to a specific pay period for a pay group, defined by the begin and end dates. For example, a monthly pay group would have 12 entries on the Pay Calendar Table page, representing a year of processing.

Identifying Bank Codes

Access the Bank Table page.

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

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

See Also

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

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Setting Up Local Country Functionality," (NLD) Loading Dutch Postal Codes

PeopleSoft 8.8 Human Resources PeopleBook: Manage Commitment Accounting, "Commitment Accounting Processing Control Tables," Creating Valid Account Codes

Defining Holiday Schedules

Access the Holiday Schedule Table page.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Monitor Absence, "Setting Up Absence Data," Assigning and Updating Work and Holiday Schedules

Creating and Maintaining Pay Groups

Access the Pay Group Table – Definition page.

The screenshot displays the 'Pay Group Table – Definition' page. At the top, there are three tabs: 'Definition', 'Process Control', and 'Calc Parameters'. The 'Definition' tab is selected. Below the tabs, the 'Company' is set to 'ACC' and the 'State of Accord' is 'State of Accord'. The 'Pay Group' is 'PAM'. The main section is titled 'Pay Group Information' and contains several fields:

- *Effective Date:** 01/01/1990
- *Status:** Active
- *SetID:** SHARE
- *Description:** Accord Monthly
- Short Description:** Acc Mnth
- *Country:** USA
- Currency:** USD
- *Employee Type Default:** Salaried
- Retiree Pay Group:** (unchecked checkbox)
- PI Configuration ID:** (empty field)
- Deduction Priority:** (empty field)
- Frequency:** A sub-section with three rows:
 - *Pay:** M (Monthly)
 - *Daily:** D (Daily)
 - *Monthly:** M (Monthly)
- GL Use:** A sub-section with two rows:
 - Rate Type:** OFFIC
 - Conv Date:** C

 The page also includes navigation buttons like 'Find', 'First', '1 of 1', and 'Last'.

Pay Group Table – Definition page

Pay Group Information

Retiree Pay Group

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

PI Configuration

ID (payroll interface configuration ID)

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

Deduction Priority

Enter a deduction priority number for your pay group.

Currency

Select the appropriate currency.

Employee Type Default

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

Excep Hrly (exception hourly): Employees who work a set number of hours each pay period. Enter exceptions to their schedules on their pay sheets.

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

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

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

Frequency

Pay

Select the frequency of pay for this pay group: *Annual, Biweekly, Daily, Monthly, Quarterly, Semimonthly, or Weekly.*

Daily

Select the daily frequency to be used by PeopleSoft Human Resources to calculate the daily rate that appears on the Compensation page of the Job Data component.

Monthly

Select the monthly frequency to be used by PeopleSoft Human Resources to calculate the monthly rate that appears on the Compensation page of the Job Data component.

GL Use

The fields in the GL Use (general ledger use) group box are for Canadian and U.S. functionality and are not for operations in the Netherlands.

Setting Up Pay Groups for Salary Administration

Access the Pay Group Table – Calc Parameters page.

Definition		Process Control		Calc Parameters	
Company:	ACC	State of Accord			
Pay Group:	PAM	Accord Monthly			
Paygroup information Find View All First 1 of 1 Last					
Effective Date:	01/01/1990	Status:	Active		
Source Bank ID:	KU01	State Bank			
Minimum Net Pay:					
*Maximum Net Pay:	10,000				
Earnings Program ID:	PRG	E&G Non-Contract			
Regulatory Region:		Holiday Schedule:	KU01	US Holiday Schedule	
Default Benefit Program:		Earnings Types *Regular Hours Earnings Type: REG *Regular Earns Earnings Type: REG *OT Hours Earnings Type: OTP *Holiday: HOL			
Retro Pay Program ID:					
Final Check Program ID:					
Canada Netherlands USA					
Collective Labor Agreement:					

Pay Group Table – Calc Parameters page

Paygroup Information

Source Bank ID	For use with PeopleSoft Payroll for North America only.
Minimum Net Pay	For use with PeopleSoft Payroll for North America only.
Maximum Net Pay	For use with PeopleSoft Payroll for North America only.
Earnings Program ID	If you're using PeopleSoft Benefits Administration, select an earnings program ID. This value becomes the default for employee records in this pay group. The other fields in this page are optional for PeopleSoft Human Resources.
Regulatory Region	Enter the regulatory region associated with this pay group.
Holiday Schedule	Select a default holiday schedule. The value you enter appears as the default in employee job data.
Default Benefit Program	If you use PeopleSoft Benefits Administration, select a default benefit program.
Retro Pay Program ID	For use with PeopleSoft Payroll for North America only.
Final Check Program ID	For use with PeopleSoft Payroll for North America only.

Earnings Types

Regular Hours Earnings Type	Select the appropriate earnings code for the regular hours earnings type.
Regular Earns Earnings Type	Select the appropriate earnings code for the regular earns earnings type.
OT Hours Earnings Type (overtime hours earnings type)	Select the appropriate earnings code for the overtime hours earnings type.
Holiday	When the system creates paysheets and detects that a holiday falls within the pay period, it uses the earnings code associated with the Holiday field. If the holiday type on the Holiday Schedule page is Canadian, the system uses the holiday earnings code specified on the Pay Group Table - Definition page to set up the holiday earnings on the paysheet.

Netherlands

Collective Labor Agreement	Select the collective labor agreement: <i>CAO Retail Trade</i> , <i>CAO Wood Industry</i> , <i>CAO Medical Staff</i> , <i>CAO Metal Industry</i> , and <i>CAO Transportation Industry</i> .
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See Also

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

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Understanding Regulatory Regions in PeopleSoft HRMS,” Associating a Regulatory Region With a Transaction

Setting Up Pay Run IDs

Access the Pay Run Table page.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Using Pay Calendars,” Establishing Pay Run IDs

Creating Pay Calendars

Access the Pay Calendar Table page.

Pay Calendar Table			
Company:	KN1 Business Institute Netherlands		
Pay Group:	KN1 Monthly - Netherlands		
Pay Period End Date:	01/31/2000	Pay Run ID:	KN1-00-01  MhPy 01-00
*Pay Period Begin Date:	01/01/2000	Paycheck Issue Date:	01/24/2000
Calendar Year:	2000	Month:	January 
Number of workdays:	21	Production Code:	
Text Payment Order:			
☐ Payroll Calculation Run			

Pay Calendar Table page

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

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Using Pay Calendars,"
Understanding Pay Calendars and Pay Run IDs

Establishing Additional Benefits Features

This section lists common elements and discusses how to:

- Set up leave plans.
- Define pension plan details.
- Set up age-graded rates.
- Create life and accidental death and dismemberment insurance coverage groups.

Common Elements Used in This Section

Age Range Low Select a low age to define this age range. The system won't accept a low-age range that exceeds the high-age range.

Age Range High Select a high age to define this age range. The system won't accept a low-age range that exceeds the high-age range.

Pages Used in Establishing Additional Benefits Features

Page Name	Object Name	Navigation	Usage
Leave Plans Table	LEAVE_PLAN_TABLE	Set Up HRMS, Product Related, Benefits NLD, Leave Plan Table	Enter basic plan data for your organization's leave plans.
Pension Plan Table	PENS_PLAN_TABLE_US	Set Up HRMS, Product Related, Benefits NLD, Pension Plan Table	Enter basic plan data and define contributory rates for your organization's pension plans.
Age-Graded Rate	AGE_RATE_TABLE	Set Up HRMS, Product Related, Benefits NLD, Age Graded Rate	Define rates for insurance benefit plans for employees and their dependents.
Coverage Group Tbl (coverage group table)	COVERAGE_GROUP_TBL	Set Up HRMS, Product Related, Benefits NLD, Coverage Group Table, Coverage Group Tbl	Define coverage group codes that set the maximum total life and accidental death and dismemberment (AD/D) coverage for life insurance and AD/D insurance benefit plans.
Dependent/Beneficiaries	DEPEND_BENEF1	Workforce Administration, Benefit Information NLD, Maintain General Information, Dependent/Beneficiary Data, Dependent/Beneficiaries	Enter dependents and beneficiaries data before enrolling employees in specific benefit programs. Once you set up the data, you can enroll the dependent in multiple benefits.

Setting Up Leave Plans

Access the Leave Plan Table page.

Leave Plan Table

Plan Type: 50 Sick
Benefit Plan: BP0066 Test Sick Leave

Leave Plans

Find | View All First 1 of 1 Last

***Effective Date:** 01/01/1980  ☒ **Balance Visible to EE for Self-Service**  

Accrual Process Date:

Accrual Calculation

***Service Units:** Months 
***Accrual Rate Units:** Hours per Month 
Award Frequency: First Run of Month

Automatic Accrual Processing

☐ **Special Calculation Routine**
☐ **Service Calc at Year Begin**

***Max Leave Balance:** 80.000
Max Leave Carryover: 40.000

Leave Plan Table page (1 of 2)

Manual Accrual Processing

☐ Pay in Lieu of Time Off

☒ Pay at Termination Percent to Pay at Termination: 100.00

☒ Allow Negative Balance Max Negative Hours Allowed:

First Year Award Values Customize | Find | View All | First ◀ 1 of 1 ▶ Last

*Employment Month	*Hours Earned	*Month Eligible
0		

Accrual Rate Values Customize | Find | View All | First ◀ 1-3 of 3 ▶ Last

After Service Interval		*Accrue Hours At		
0	Service Months	4.000000	Hours per Month	+ -
12	Service Months	6.000000	Hours per Month	+ -
48	Service Months	8.000000	Hours per Month	+ -

Service Bonus Values Customize | Find | View All | First ◀ 1-3 of 3 ▶ Last

After Service Interval		*Award Bonus Hours		
0	Service Months	16.000000		+ -
60	Service Months	32.000000		+ -
120	Service Months	40.000000		+ -

Find | View All First ◀ 1 of 1 ▶ Last

Leave Plan Table page (2 of 2)

Leave Plans

Accrual Process Date The date you last ran a leave accrual calculation process for the displayed leave plan type and benefit plan.

Accrual Calculation

Service Units The units by which you measure your employee's length of service: *Hours, Months, Pay Period, or Years.*

Accrual Rate Units The unit by which the accrual rate is quoted. Accrual awards are always measured in hours, so valid values are *Hours per Hour, Hours per Month, Hours per Pay Period, Hours per Week, and Hours per Year.*

Award Frequency Tells you how often your employees receives the leave accrual award: *Every Run, First Run of Month, First Run of Week, First Run of Pay Period, or First Run of Year.*

The field values for the Award Frequency field are determined by the Accrual Rate Units field values:

Hours per Hour = Every Run.

Hours per Pay Period = First Run of Pay Period.

Hours per Week = First Run of Week.

Hours per Months = First Run of Month.

Hours per Year = First Run of Year.

Automatic Accrual Processing

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

Special Calculation Routine Select if your company has programmed a special calculation method.

Max Leave Balance
(maximum leave balance) Enter the maximum leave hours that an employee can accrue for the leave plan. If there is no maximum, enter 99999.

Service Calc at Year Begin (service calculation at year begin) Select to calculate leave hours according to length of service as of January 1 of the current year.

Don't select this check box if you want to calculate leave hours according to the length of service as of the leave accrual process date. When performing this calculation, the system uses the service date in the employee's employment record.

Max Leave Carryover
(maximum leave carryover) Enter the maximum number of hours that an employee can carry from one calendar year to the next. The system accepts a zero to indicate that there is no carryover allowed. If there is no maximum, enter 99999.

Manual Accrual Processing

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

Pay in Lieu of Time Off Select if you pay employees for accrued leave time that they don't use.

Pay at Termination Select if employees can be paid at termination for a portion or for all time accrued.

Percent to Pay at Termination If you selected the Pay at Termination check box, enter the percentage of pay that employees receive at termination.

Allow Negative Balance Select if you allow employees to take more hours than they have accrued.

Max Negative Hours Allowed (maximum negative hours allowed) Enter the maximum number of negative hours the employee is allowed.

First Year Award Values

Use this group box for leave plans that use annual accruals. Define a leave plan in which, during the first year of service, leave hours are prorated based on the month employment begins. First year award values are available only when the leave plan's Accrual Rate Unit field value is *Hours Per Year*.

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

Employment Month Enter the month that the employee began service with your company.

Month Eligible Enter the month the employee became eligible for the leave benefit.

Accrual Rate Values

These values are defined in terms of the service unit and accrual rate unit. Enter the values that define how your employees accrue time for this leave plan.

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

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

After Service Interval Using the accrual rate values that you defined, enter the interval of service after which an employee accrues leave time.

Accrue Hours At Using the accrual rate values that you defined, enter the interval of service that an employee accrues for the after service interval.

Service Bonus Values

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

After Service Interval Using the accrual rate values that you defined, enter the interval of service after which an employee accrues bonus hours.

Award Bonus Hours Using the accrual rate values that you defined, enter the bonus hours the employee receives for the service interval that you specify.

Defining Pension Plan Details

Access the Pension Plan Table page.

Pension Plan Table	
Benefit Plan:	BP0124 Standard Pension Plan
Effective Date:	01/01/1980
Plan Type:	82 Pension Plan 1 - U.S.
US Pension Plans Find View All First 1 of 1 Last	
*Effective Date:	01/01/1980
*Pension Type:	Qualified ☐ Allow Contingent Beneficiaries
Plan Yr Begins (Month/Day):	1 1
Plan Yr Ends (Month/Day):	12 31
Contributory Plans	
☒ Voluntary Contributns Allowed	Special Accumulator Code: BH1
Rates of Deduction:	
5.000 % up to	100,000 and 1.000 % over: 100,000

Pension Plan Table page

US Pension Plans

Pension Type

This field is for U.S. and Canadian functionality, not for operations in the Netherlands.

Allow Contingent Beneficiaries

This check box is for U.S. and Canadian functionality, not for operations in the Netherlands.

Plan Yr Begins (Month/Day) (plan year begins [month/day])

The year in which the pension plan begins. Enter the information in month/day format.

Plan Yr Ends (Month/Day) (plan year ends [month/day])

The year in which the pension plan ends. Enter the information in month/day format.

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

Effective Date	Plan Year Begin Date	Plan Year End Date
1/1/1900	7/1	6/30
1/1/1980	7/1	12/31
1/1/1981	1/1	12/31

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

Contributory Plans

Voluntary Contributions Allowed (voluntary contributions allowed)

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

Special Accumulator Code

Enter the special accumulator code, if applicable, used to track earnings for mandatory contributions that can be structured as a percent of earnings subject to pension withholding.

Rates of Deduction

Enter the contribution rates. You can have different rates above and below a threshold. For example, employees can contribute 2 percent of earnings up to 50,000.00 EUR and 3 percent of earnings above that.

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

Setting Up Age-Graded Rates

Access the Age-Graded Rate page.

Age-Graded Rate

Age-Graded Rate Table ID: B101

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

*Effective Date: 01/01/1900 + -

*Description: B101 Short Description:

*Premium Pay Frequency: M Monthly *Rate per Unit: None [Specify Limit](#)

Coverage/Price Customize | Find | View All First 1-2 of 2 Last

General	Employer Portion	Employee Portion				
*Gender	Age Range Low	Age Range High	Total Rate - Smoker	Total Rate - Nonsmoker		
Female	1		50.000		+	-
Male	1		50.000		+	-

Age-Graded Rate page

Age-Graded Rate Table

Effective Date

The effective date must be the same as, or prior to, the effective dates of the benefit program and benefit plan combinations with which you associate the rates.

Rate per Unit

Select from the following values:

None: For a flat rate.

Per Hundred: For a rate that applies to each 100.00 EUR of coverage.

Per Thousand: For a rate that applies to each 1000.00 EUR of coverage.

Specify Limit

Click this link to display the Amount to Limit page, which defines the portion of the employee rate that is subject to the percent of gross pay limit defined on the Calculation Rule page: *All, Flat Amount, Not Applicable, or Percent of Rate.*

General Tab

Access the Age-Graded Rate page: General tab

Coverage/Price						Customize Find View All  First 1-2 of 2 Last	
General		Employer Portion		Employee Portion			
*Gender	Age Range Low	Age Range High	Total Rate - Smoker	Total Rate - Nonsmoker			
Female 	1		50.000				
Male 	1		50.000				

Age-Graded Rate page: General tab

Gender

For each rate, define the gender. Define rates for males and females separately. Once you select a gender, the rates apply only to the gender you select.

Total Rate - Smoker

Enter the total rate for smoker, according to the rates per unit.

Total Rate - Nonsmoker

Enter the total rate for a nonsmoker, according to the rates per unit.

Employer Portion Tab

Access the Age-Graded Rate page: Employer Portion tab.

Coverage/Price						Customize Find View All  First 1-2 of 2 Last	
General		Employer Portion		Employee Portion			
*Gender	Age Range Low	Age Range High	Smoker	Nonsmoker			
Female 	1		50.000				
Male 	1		50.000				

Age-Graded Rate page: Employer Portion tab

Smoker

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

Nonsmoker

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

Employee Portion Tab

Access the Age-Graded Rate page: Employee Portion tab.

Coverage/Price						Customize Find View All  First  1-2 of 2  Last	
General		Employer Portion		Employee Portion			
*Gender	Age Range Low	Age Range High	Smoker	Nonsmoker			
Female 	1						
Male 	1						

Age-Graded Rate page: Employee Portion tab

Smoker

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

Nonsmoker

The system calculates these rates based on the rates in the Total Rate - Nonsmoker field on the Age-Graded Rate page: General tab and the rates in the Nonsmoker field on the Age-Graded Rate page: Employer Portion tab.

Creating Life and Accidental Death and Dismemberment Insurance Coverage Groups

Access the Coverage Group Tbl page.

Coverage Group Tbl																	
Coverage Group Code:	B001																
<table border="1"> <thead> <tr> <th colspan="2">Coverage Groups</th> <th>Find View All</th> <th>First  1 of 1  Last</th> </tr> </thead> <tbody> <tr> <td>*Effective Date:</td> <td>01/01/1980 </td> <td colspan="2"> </td> </tr> <tr> <td>*Status:</td> <td>Active </td> <td colspan="2"></td> </tr> <tr> <td>Coverage Maximum:</td> <td>1,000,000</td> <td colspan="2"></td> </tr> </tbody> </table>		Coverage Groups		Find View All	First  1 of 1  Last	*Effective Date:	01/01/1980 	 		*Status:	Active 			Coverage Maximum:	1,000,000		
Coverage Groups		Find View All	First  1 of 1  Last														
*Effective Date:	01/01/1980 	 															
*Status:	Active 																
Coverage Maximum:	1,000,000																

Coverage Group Tbl page

Coverage Groups

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

Coverage Maximum

Enter a maximum coverage amount for the coverage group. This amount applies to all the life and AD/D insurance benefit plans associated with the coverage group code and associated with one benefit program.

Specifying Employee Bank Information

This section discusses how to enter payment method data.

Page Used to Specify Employee Bank Information

Page Name	Object Name	Navigation	Usage
Bank/Giro	DIRECT_DEPOSIT_NLD	Workforce Administration, Benefit Information NLD, Maintain General Information, Payment Distribution, Bank/Giro	Specify the bank account information for each employee.

Entering Payment Method Data

Access the Bank/Giro page.

The screenshot displays the 'Bank/Giro' page for employee 'Bakker, Kees den' (ID: KN0003). The page is titled 'Direct Deposit Details' and includes navigation links like 'Find', 'View All', 'First', '1 of 1', and 'Last'. The main form contains several sections: 'Effective Date' (01/01/1999), '*Status' (Active), 'Priority' (1), 'Bank ID' (01506801), 'Branch ID' (empty), 'Account #' (161513565), 'Ledger Account#' (empty), '%Net Pay / Amount' (100.00), and 'Payment Description' (Base Salary). A 'Payment Type' section has radio buttons for 'Cash', 'Bank' (selected), and 'Giro'. An 'Ascription' section has a text field with 'Salary'.

Bank/Giro page

Priority

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

Account # (account number)

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

Ledger Account# (ledger account number)

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

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

Enter a percentage of net pay or an exact amount to be paid. If there are multiple payments or distributions, then state each as either a percentage of net pay or an amount.

For example, an employee might want to have 50.00 EUR deposited to a savings account, receive a check for 100.00 EUR, and have 100 percent of the remaining net pay deposited to a checking account.

Ascription

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

CHAPTER 4

Entering Earnings, Payments, and Other Payroll Information

This chapter provides an overview of earnings and payments, lists common elements, and discusses how to enter employee earnings.

Understanding Earnings and Payments

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

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

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

Following are some important terms to understand:

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

Common Elements in This Chapter

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

Entering Employee Earnings

This section discusses how to:

- Enter permanent earnings data.
- Enter hourly earnings data by calendar.
- Enter incidental hours data.
- Enter incidental hourly earnings data.

Pages Used to Enter Employee Earnings

Page Name	Object Name	Navigation	Usage
Earnings	ADDITIONAL_PAY1_NL	Workforce Administration, Benefit Information NLD, Assign Earnings and Deductions, Regular Earnings, Earnings	Enter all types of permanent extra payments made to employees in addition to regular salary. Do not enter incidental earnings on this page.
Incidental Earnings	EARNINGS_INC_NL	Workforce Administration, Benefit Information NLD, Assign Earnings and Deductions, Incidental Earnings	Enter incidental payments made to employees. (You must have first set up valid earnings codes on the Earnings page.)
Incidental Hours	ADDL_HRS_INC_NL	Workforce Administration, Benefit Information NLD, Assign Earnings and Deductions, Hourly Time/Overtime, Incidental Hours	Enter incidental payments made to individual employees on an hourly basis. (You must have first defined the earnings codes on the Earnings page.)
Hours Changed	ADDL_HRS_DE_INC_NL	Workforce Administration, Benefit Information NLD, Assign Earnings and Deductions, Hourly Time by Calendar, Hours Changed	Enter payments made to an employee group on an hourly basis. Do not use this page to enter information about incidental earnings; enter incidental earnings on the Incidental Earnings page. (You must have first set up valid earnings codes on the Earnings page and have set up one or more pay calendars for the pay groups to which the employees belong.)

Entering Permanent Earnings Data

Access the Earnings page.

Earnings	
Bakker,Kees den	Employee
EmplID: KN0003	Empl Rcd#: 0
Additional Pay Details Find View All First 1 of 1 Last	
*Earnings Code: MIL	Mileage Reimbursement
Pay Details Find View All First 1 of 1 Last	
*Effective Date: 01/01/2001	Earnings End Date:
Compensation Rate/Frequency: 4,140.74 EUR / Monthly	
Standard Hours: 40.00	Work Period: Weekly
Currency Code: EUR	Employee Type: Salaried
Hours:	Hourly Rate:
Earnings: 238.23	Reason: Not Specif
Goal Amount:	☒ OK to Pay

Earnings page

Earnings End Date

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

Compensation Rate/Frequency

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

Standard Hours

The standard hours that the employee works per work week.

Work Period

The standard work period is the time period in which employees must complete the standard hours.

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

Employee Type

The employee type according to predetermined variables.

Reason

Select a reason for the payment.

Goal Amount

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

Entering Hourly Earnings Data by Calendar

Access the Incidental Earnings page.

Incidental Earnings	
Bakker,Kees den	Employee
EmplID: KN0003	Empl Rcd#: 0
Earnings Details Find View All First 1 of 1 Last	
*Effective Date: 04/01/2001	Company: Business Institute Netherlands
Sequence: 0	Pay Group:
*Earnings Code: BNS Bonus	Currency Code: EUR
Earnings: 1250.00	
Unit/Hours:	Rate/Perc:
Begin Period: 01/01/2001	End Period: 03/31/2001
Comments:	
☒ OK to Pay	

Incidental Earnings page

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

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

Entering Incidental Hours Data

Access the Incidental Hours page.

Incidental Hours	
Bakker,Kees den	Employee
EmplID: KN0003	Empl Rcd#: 0
Incidental Hours Details Find View All First 1 of 1 Last	
*Effective Date: 03/31/2000	Company: Business Institute Netherlands
Sequence: 0	Pay Group:
*Earnings Code: OTP Overtime	Currency Code: NLG
Other Hours: 2.00	Hourly Rate: 75.00
Regular Shift:	☒ OK to Pay
Begin Period:	End Period:
Comments:	

Incidental Hours page

Other Hours Enter the amount of other hours worked.

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

Regular Shift Indicate the employee's regular shift.

Entering Incidental Hourly Earnings Data

Access the Hours Changed page.

Hours Changed

Effective Date: 03/31/2000

Hours Changed Details Find | View All First 1 of 2 Last

***EmplID:** KN0003 Bakker, Kees den

Empl Rcd#: 0

Sequence: 0

***Hours Type:** OTP Overtime

Hours: 2.00

Shift: [dropdown]

Begin Period: [calendar icon]

End Period: [calendar icon]

Comments: [text area]

Company: Business Institute Netherlands

Pay Group:

Currency Code: NLG

Hourly Rate: 75.00

☒ **OK to Pay**

Hours Changed page

Hours Type

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

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

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

Shift

Select the employee's regular shift.

CHAPTER 5

Entering Benefits and Deductions

This chapter lists prerequisites and discusses how to:

- Review employee eligibility for benefits.
- Identify employee social insurance providers.
- Provide social insurance notification.
- Enter employee tax withholdings.
- Enroll employees in a benefits program.
- Enroll employees in benefit plans.
- Enroll employees in pension plans and reviewing benefits information.
- Establish employee general deductions.
- Add employee incidental deductions.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce”

Prerequisites

Before you can record deductions and participation in benefit plans for your employees, ensure that your employees are assigned to a benefits program using the Benefits Program page.

Reviewing Employee Eligibility for Benefits

This section discusses how to view personal data for benefits eligibility.

Page Used to View Personnel Data

Page Name	Object Name	Navigation	Usage
Employee Data Summ (employee data summary)	EMPLOYEE_SUMMARY1	Workforce Administration, Benefit Information NLD, Review Benefits, Employee Data Summary, Employee Data Summ	View the personnel administration data that you need to determine an employee's eligibility for benefits. The Employee Status, Full/Part Time, Regular/Temporary, Pay Group, and Annual Benefits Base Rate fields each directly affect either benefit eligibility or benefit processing. The date information that appears in the Significant Dates group box, such as hire date or seniority date, can directly affect benefit eligibility. The remaining fields are defined for the employee on the Job record.

Viewing Personal Data for Benefits Eligibility

Access the Employee Data Summ page.

Employee Data Summ			
Bakker,Kees den		Employee	EmplID: KN0003 Empl Rcd#: 0
Employee Summary Data			
Employee Status:	Active		
Benefits Employee Status:	Active		
Full/Part Time:	Full-Time		
Regular/Temporary:	Regular		
Standard Hours:	40.00		
Work Period:	Weekly		
Pay Group:			
Company:	Business Institute Netherlands		
Employee Type:	Salaried		
Business Unit:	NLD01	Netherlands Business Unit	
Job Code:	600085	Manager-Finance	
Supervisor Level:			
Department:	13000	Finance - Netherlands	
Location Code:	KN02	The Hague	
Annual Benefits Base Rate:			

Employee Data Summ page (1 of 2)

National ID			
Country:	NLD	NID Type:	PR SFI National ID 032638486
Gender:	Male		
Marital Status:	Married		
Significant Dates			
Hire Date:	10/14/1990	Service Date:	10/14/1990
Company Seniority Date:	10/14/1990	Rehire Date:	
Termination Date:		Date of Birth:	06/01/1960
Marital Status Date:	08/03/1994	Date of Death:	

Employee Data Summ page (2 of 2)

Employee Summary Data

Employee Status

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

Full/Part Time

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

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

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

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

Part-Time: Defined by your organization.

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

Rehire Date	The employee's rehire date, if applicable.
Termination Date	The employee's termination date, if applicable.
Date of Birth	The employee's date of birth.
Date of Death	The employee's date of death, if applicable.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Using Frequencies,"
Understanding Frequency Calculations for Conversions

Identifying Employee Social Insurance Providers

This section discusses how to identify employee participation in national insurance programs.

Page Used in Identifying Employee Social Insurance Providers

Page Name	Object Name	Navigation	Usage
Social Insurance	SOCIAL_ASSUR_NL	Workforce Administration, Benefit Information NLD, Maintain General Information, Social Insurance	Identify an employee's participation in one of the national social insurance programs and identify the insurance provider.

Identifying Employee Participation in National Social Insurance Programs

Access the Social Insurance page.

Social Insurance

Bakker,Kees den

Employee

EmplID: KN0003

Empl Rcd#: 0

Social Insurance Details

Find | View All First 1 of 1 Last

*Effective Date: 01/01/1999

*Status: Active

National Health Service

*Premium Health Insurance: Deduction

SetID: NLD01

Vendor: KNZKV Dutch Health Service Provider

Registration No.:

☐ Reducement Unemployment

*Disability Insurance: Deduction

*Premium Health Law: No Ded

*Unemployment Tax: No Ded

Social Insurance page

National Health Service	If the employee's income is below the national health care limit, then that employee is required by law to participate in a national health service scheme.
Premium Health Insurance	Options are: <i>Deduction</i> : Select if the law requires the employee's participation in a national health service scheme. <i>No Ded</i> (no deduction): Select if the law doesn't require the employee's participation in a national health service scheme.
Vendor	If the employee is required to participate in a national health service scheme, select the vendor from the list. Leave this field blank if the law doesn't require the employee to participate in a national health service scheme.
Registration No. (registration number)	If the employee is required to participate in a national health service scheme, enter the employee's association member registration number. Leave this field blank if the law doesn't require the employee to participate in a national health service scheme.
Reducement Unemployment	Select this check box if, at the time of hire, the employee was classified as "long-term unemployed."
Disability Insurance	If you selected the Reducement Unemployment check box, select <i>Deduction</i> or <i>No Ded</i> from the values.
Premium Health Law	If you didn't select the Reducement Unemployment check box, select <i>Deduction</i> or <i>No Ded</i> from the values. Use the values to indicate whether the employee should have deductions for premium health care.

Unemployment Tax

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

Providing Social Insurance Notification

This section discusses how to:

- Report personal data for new employees to the Dutch Insurance Board.
- Send notice when employee income rises above a certain level.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” Administer Salaries for the Netherlands Reports

Pages Used to Provide Social Insurance Notification

Page Name	Object Name	Navigation	Usage
Ins. Board Notification (insurance board notification)	RUNCTL_INT001_NL	Workforce Administration, Benefit Information NLD, Reports, Insurance Board Notification, Ins. Board Notification	Use the Insurance Board Notification report (INT001NL) to report personal data for new employees to the Dutch Insurance Board.
Insurance Notification	RUNCTL_INT002_NL	Workforce Administration, Benefit Information NLD, Reports, Health Insurance Notification, Insurance Notification	Use the Insurance Notification report (INT002NL) to send notice to the DNHS if an employee's income rises above a certain level.

Reporting Personal Data for New Employees to the Dutch Insurance Board

Access the Ins. Board Notification page.

Ins. Board Notification

Run Control ID: GN2 [Report Manager](#) [Process Monitor](#) **Run**

Language: English

Report Request Parameters

EmplID: Empl Rcd#: 0 As Of Date: 11/06/2002

Reason for Communication

- ☒ Hire
- ☐ Change Data Social Insurance
- ☐ Change Data Industrial Board
- ☐ Termination
- ☐ Death

☐ Correction

Ins. Board Notification page

Reason For Communication

Select the reason for producing the report: Hire, Change Data Social Insurance, Change Data Industrial Board, Termination, or Death.

Correction

Select this check box if you are reporting a correction to data previously reported.

Sending Notice When Employee Income Rises Above a Certain Level

Access the Insurance Notification page.

Insurance Notification

Run Control ID: GN2 [Report Manager](#) [Process Monitor](#) **Run**

Language: English ▼

Report Request Parameters

Contactperson: Telephone:

EmplID: 🔍 Empl Rcd#: 0 🔍 As Of Date: 11/06/2002

Reason for Communication

☒ Start
☐ End

Reason for Start

☒ Hire
☐ Transition

Reason for End

☒ Termination
☐ Salary Limit Reached
☐ Military Service
☐ Death
☐ Else

Insurance Notification page

Reason for Communication Use this group box to identify the reason for the notification to the DNHS. Options are:

Start: Select to report a start in DNHS coverage. You must then select an option from the Reason for Start group box.

End: Select to report an end in DNHS coverage. You must then select an option from the Reason for End group box.

Reason for End Use this group box to enter the reason to end DNHS coverage. Options are:

Termination: Select to report an employee termination.

Salary Limit Reached: Select if the employee has reached the salary limit.

Military Service: Select if the employee enters military service.

Death: Select if the employee dies.

Else: Select for an unlisted reason and enter the reason in the provided field.

Reason for Start Use this group box to enter the reason to start DNHS coverage. Options are:

Hire: Select if the employee is a new hire.

Transition: Select if the employee is changing jobs.

Entering Employee Tax Withholdings

This section discusses how to enter wage tax data.

Page Used to Enter Employee Tax Withholdings

Page Name	Object Name	Navigation	Usage
Tax Data	EMPL_TAX_DATA_NL	Workforce Administration, Benefit Information NLD, Maintain General Information, Tax Data	Enter Dutch rules that determine an employee's wage tax. What you enter here affects the gross/net calculations made by your payroll system.

Entering Wage Tax Data

Access the Tax Data page.

The screenshot displays the 'Tax Data' page for employee 'Bakker, Kees den' (EmpID: KN0003). The page is titled 'Tax Data Details' and includes navigation links like 'Find', 'View All', 'First', '1 of 1', and 'Last'. The main form contains several fields: '*Effective Date' set to '01/01/2001', '*Exception tax' set to 'No Exception', '*Tax Table Type' set to 'White Tax Table', and '*Travel Data' set to 'Company Car'. There are checkboxes for 'Tax Credits' (checked), '30% Ruling', and 'Anonymous Rate'. At the bottom, there are input fields for 'Percentage Special Tax Rate' and 'Taxable Income'.

Tax Data page

Tax Credits

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

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

Exception tax

Select any exceptions to the wage tax.

Tax Table Type

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

Travel Data

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

30% Ruling (30 percent ruling)	Select if the 30 percent ruling applies to the employee, whereby 30 percent of their income is tax-free. The 30 percent ruling applies to Dutch employees on international assignments and non-Dutch employees working in the Netherlands on an international assignment.
Percentage Special Tax Rate	Enter the percentage special tax rate for special tax cases.
Anonymous Rate	Select to indicate when an employee hasn't handed over the documentation regarded as official proof of identity. When this occurs, the highest tax rate (about 60 percent) is applied in order to discourage illegal immigration.
Taxable Income	Enter the employee's annual taxable income in Euro. Enter a gross amount before tax deductions.

Enrolling Employees in a Benefits Program

This section provides an overview of employee enrollment in benefits programs and plans and discusses how to verify enrollment.

Understanding Employee Enrollment in Benefits Programs and Plans

To enroll employees in benefits programs and plans:

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

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

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

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

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

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

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

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

Page Used to Enroll Employees in Benefits Programs

Page Name	Object Name	Navigation	Usage
Ben. Prog. Partic. (benefit program participation)	BEN_PROG_PARTICPTN	Workforce Administration, Benefit Information NLD, Enroll in Benefits, Benefit Program, Ben. Prog. Partic.	Verify that an employee is enrolled in the correct benefit program; override the default setting to change the employee's benefit program if needed.

Verifying Enrollment

Access the Ben. Prog. Partic. page.

The screenshot displays the 'Ben. Prog. Partic.' page for employee 'Bakker, Kees den' with ID 'KN0003'. The page title is 'Benefit Program Participation'. It shows the following details:

- *Effective Date:** 10/14/1990
- *Benefit Program:** KN1 (Netherlands Base Benefits)
- Currency Code:** NLG

Navigation controls include 'Find', 'View All', 'First', '1 of 1', and 'Last'. There are also '+' and '-' buttons for adding or removing records.

Ben. Prog. Partic. page

Benefit Program

You can change the employee's benefit program enrollment by selecting from the list of values. When you press TAB to leave the Benefit Program field, the effective date changes to today's date and the currency code changes.

Changes that you make here automatically affect the employee's job data record and appear on the Job Data - Benefits Program Participation page.

Enrolling Employees in Benefit Plans

This section discusses how to enroll employees and dependents in benefit plans.

Page Used to Enroll Employees in Benefits Plans

Page Name	Object Name	Navigation	Usage
Health Benefit Elections	HEALTH_BENEFITS1	Workforce Administration, Benefit Information NLD, Enroll in Benefits, Health Benefits, Health Benefit Elections	Enroll employees and dependents in health plan types, such as medical, dental, and vision plans.

Enrolling Employees and Dependents in Benefit Plans

Access the Health Benefit Elections page.

Health Benefit Elections

Name: Bakker,Kees denID: KN0003

Plan TypeFind | View AllFirst1 of 1Last

Plan Type: 10 Medical+ -

CoverageFind | View AllFirst1 of 1Last

*Coverage Begin Date: 01/01/1999+ -

*Deduction Begin Date: 01/01/1999+ -

Coverage Election: ☒ Elect ☐ Waive ☐ Terminate+ -

*Election Date: 01/01/1999+ -

Benefit Program: Benef NLD

Benefit Plan: KNMED Basic Medical Plan

Option Code:

Coverage Code: 4 Family

Health Provider ID: ☐ Previously Seen

HIPAA Report Date (Emp):

HIPAA Report Date (Dep):

Employee Status: Active

Enroll All Dependents

Dependent/BeneficiariesCustomize1-2 of 2

*ID	Name	Relationship	Health Provider ID	Prev Seen	
01	Versluis-den Bakker,Elly	Spouse		☐	-
02	Bakker,Yvonne den	Daughter		☐	-
+					

Health Benefit Elections page

Coverage

Coverage Begin Date

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

Coverage Election

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

Elect: Select if the employee elects coverage. Also enter the present date in the Election Date field.

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

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

Election Date

Use this field for the dates associated with the coverage election options.

Benefit Plan	Select the benefit plan. Only the health benefit plans that you've associated with the employee's benefit program as of the deduction begin date appear in the list of available options.
Coverage Code	Select the coverage code that defines the kind of coverage that the employee wants, such as <i>Employee Only</i> or <i>Employee + Dependents</i> . The coverage code is linked to the benefit plan, so only coverage codes defined for the selected benefit plan are available.
Health Provider ID	Use this field to track additional information about the employee's health provider. Enter the name of the provider ID number or any other provider-related information that the payroll system may require.

Dependent/Beneficiaries

ID	Select the dependent/beneficiary ID. This information is entered on the Dependent/Beneficiary page. After selecting the ID, the dependent/beneficiary's name and relationship appear.
Health Provider ID	Use this field to track additional information about the dependent's health provider. Enter the provider ID number or any other provider-related information that the payroll system may require.

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

See Also

[Chapter 5, "Entering Benefits and Deductions," Enrolling Employees and Dependents in Benefit Plans, page 71](#)

[Chapter 5, "Entering Benefits and Deductions," Enrolling Employees in a Benefits Program, page 69](#)

Enrolling Employees in Pension Plans and Reviewing Benefits Information

This section provides an overview of pension plan enrollment and discusses how to enroll employees and dependents in pension plans.

Understanding Pension Plan Enrollment

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

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

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

Pages Used to Enroll Employees in Pension Plans and Review Benefits Information

Page Name	Object Name	Navigation	Usage
Pension Plan Elections	PENSION_PLAN1	Workforce Administration, Benefit Information NLD, Enroll in Benefits, Pension Plans, Pension Plan Elections	Enroll employees in pension plans and enter salary and contribution amount information that can be used for payroll processing.
Benefits Summary	BENEFITS_SUMMARY1	Workforce Administration, Benefits Information NLD, Review Benefits, Benefits Summary	View a summary of an employee's benefits participation in health, life, and accidental death and disability coverage.
Benefits Summary (PI DedCalc) (benefits summary [payroll interface deduction calculation])	BENEFITS_DED_SUMM1	Workforce Administration, Benefits Information NLD, Review Benefits, Benefits Deduction Summary, Benefits Summary (PI DedCalc)	View a summary of an employee's benefit deductions, such as health, life, and accidental death and disability plans, regardless of the payroll system that your organization uses.

Enrolling Employees and Dependents in Pension Plans

Access the Pension Plan Elections page.

Pension Plan Elections

Bakker,Kees den ID: KN0003

Plan Type Find | View All First 1 of 1 Last
Plan Type: 80 Standard Pension

Coverage Find | View All First 1 of 1 Last
*Deduction Begin Date: 01/01/1999
Participation Election: ☒ Elect ☐ Waive ☐ Terminate *Election Date: 01/01/1999
Benefit Program: Netherlands Base Benefits
Benefit Plan: KNPENS Standard Pension Plan Option Code:
Voluntary Contributions
Flat Amount Contribution: 0.00 Or Percent of Earnings: 3.000
Salary for Pension Calculation: 109500.00 Employee Status: Active
Assign All Beneficiaries
Dependent/Beneficiaries Customize 1 of 1

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

Total Primary Percent: 100
Total Contingent Percent: Update Totals

Pension Plan Elections page

Plan Type

Select a plan type to identify the type of pension plan in which your employee will enroll.

Coverage**Deduction Begin Date**

Enter the date for employee contribution deductions to begin.

Participation Election

Use this field to define whether the employee is electing, waiving, or terminating coverage. By default, the Elect option is selected and today's date appears in the Election Date field.

Elect: Select if the employee elects coverage, and enter the date the election starts in the Election Date field.

Waive: Select if the employee doesn't elect coverage, and enter the date that the waiver starts in the Election Date field.

Terminate: Select if the employee is terminating coverage, and enter the coverage termination date in the Election Date field.

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

Establishing Employee General Deductions

This section provides an overview of deductions and discusses how to enter data for general deductions.

See Also

[Chapter 3, "Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands," Understanding Deductions, page 21](#)

[Chapter 3, "Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands," Setting Up General Deduction Data, page 23](#)

Understanding Deductions

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

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

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

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

Page Used to Establish Employee General Deductions

Page Name	Object Name	Navigation	Usage
General Deduction Data	GENL_DED_DATA_NL	Workforce Administration, Benefit Information NLD, Assign Earnings and Deductions, General Deductions, General Deduction Data	Record information about general (not benefit-related) deductions for employees. Depending on how you choose to implement PeopleSoft Human Resources Administer Salaries for The Netherlands, you can also use this page to enter employee benefit deductions.

Entering Data for General Deductions

Access the General Deduction Data page.

General Deduction Data

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

Deductions Data Info Find | View All First 1 of 1 Last

*Deduction Code: KN0001 Staff Association Contribution

Deductions Data Details Find | View All First 1 of 1 Last

*Effective Date: 01/01/2001 Deduction End Date:

Employee Status: Active

Currency Code: EUR

Deduction Calculation Routine

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

Deduction Rate or %:

Flat/Addl Amount: 6.81

Goal Amount:

General Deduction Data page

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

Adding Employee Incidental Deductions

This section provides an overview of incidental deductions and discusses how to add employee incidental deductions.

Understanding Incidental Deductions

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

Page Used to Add Employee Incidental Deductions

Page Name	Object Name	Navigation	Usage
Incidental Deductions	DEDUCTION_INC_NL	Workforce Administration, Benefit Information NLD, Assign Earnings and Deductions, Incidental Deductions	Enter various types of incidental deductions from an employee's pay.

Adding Employee Incidental Deductions

Access the Incidental Deductions page.

Incidental Deductions

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

Incidental Deduction Details Find | View All First 1 of 1 Last

*Effective Date: 01/01/2001 Company: Business Institute Netherlands

Sequence: 0 Pay Group:

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

Benefit Plan:

*Deduction Code: KUHLTH Health Club Dues

Amount: Currency Code: EUR

Rate/Pct: Goal Amount: 275.00 ☒ OK to Pay

Begin Period: End Period:

Comments:

Incidental Deductions page

Plan Type

Select the plan type, which automatically uses a default of 00 (General) because most incidental deductions are general deductions rather

than benefits deductions. Other one-time benefit deductions can be associated with other plan type codes.

Benefit Plan

Enter a benefit plan.

Deduction Code

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

See Chapter 3, “Setting Up PeopleSoft Human Resources Administer Salaries for The Netherlands,” Setting Up Permanent and Incidental Deductions for Tax Purposes, page 23.

Amount

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

Currency Code

Enter the currency code for the deductions.

Rate/Pct (rate/percent)

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

Goal Amount

Enter the goal amount if you want to specify a total amount at which withholding of the deduction should stop.

OK to Pay

Select to indicate approval if your organization has a procedure in place to first enter the incidental hours and then to obtain approval for payment of the incidental hours.

Begin Period and End Period

Enter the beginning and ending dates of the period for which the incidental deduction applies.

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.

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