



PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements

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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 Meet Regulatory Requirements

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: Meet Regulatory Requirements* 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 Meet Regulatory Requirements

This chapter provides an overview of PeopleSoft Human Resources Meet Regulatory Requirements and discusses:

- PeopleSoft Human Resources Meet Regulatory Requirements business processes.
- PeopleSoft Human Resources Meet Regulatory Requirements implementation.

PeopleSoft Human Resources Meet Regulatory Requirements Business Processes

The PeopleSoft Human Resources Meet Regulatory Requirements business processes are:

- (AUS) Meet regulatory requirements for Australia.
- (CAN) Meet regulatory requirements for Canada.
- (FRA) Meet regulatory requirements for France.
- (GBR) Meet regulatory requirements for the United Kingdom.
- (NZL) Meet regulatory requirements for New Zealand.
- (USA) Meet regulatory requirements for the United States.
- (USF) Perform Central Personnel Data File edit processing.
- (GBR) (USA) (USF) Meet disability regulatory requirements.

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

PeopleSoft Human Resources Meet Regulatory Requirements Implementation

The PeopleSoft Human Resources Meet Regulatory Requirements table-loading implementation includes setting up PeopleSoft HRMS fundamental tables and then the PeopleSoft Human Resources Meet Regulatory Requirements application tables.

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

This section discusses how to:

- Set up PeopleSoft HRMS fundamental tables.
- Set up core PeopleSoft Human Resources Meet Regulatory Requirements tables.

Important! The order in which you set up the tables required to implement PeopleSoft Human Resources Meet Regulatory Requirements may vary. You do not necessarily set up each application in sequence. For example, you might set up HRMS tables, then tables for the PeopleSoft Human Resources Meet Regulatory Requirements core application, then tables specific to the relevant country or industry, and then additional PeopleSoft Human Resources Meet Regulatory Requirements core tables. In addition, the order in which you set up tables may depend on the features that you use. This chapter discusses how PeopleSoft documentation corresponds to the overall implementation process. The chapter does not provide step-by-step instructions on how to perform an actual implementation.

Setting Up PeopleSoft HRMS Fundamental Tables

Setting up PeopleSoft Human Resources Meet Regulatory Requirements entails setting up fundamental HRMS tables that are common to multiple HRMS applications. The information that you define in these tables lays the foundation for PeopleSoft Human Resources Meet Regulatory Requirements setup. The table describes the steps.

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

Setting Up Core PeopleSoft Human Resources Meet Regulatory Requirements Tables

The steps discussed in this section suggest an order in which you define the information in the core PeopleSoft Human Resources Meet Regulatory Requirements tables. The information that you define in the global tables lays the foundation for this setup.

Setting up these core tables prepares your system to support the Manage Positions business process.

Note. The following table contains the implementation steps necessary to set up PeopleSoft Human Resources Meet Regulatory Requirements for multiple countries. The three-letter code preceding each step identifies the country or agency (for example, the US federal government) to which the step applies.

Step	Reference
1. (AUS) Define occupational codes per Australian Standard Classification of Occupations (ASCO) standard requirements.	Chapter 3, “(AUS) Meeting Regulatory Requirements for Australia,” Maintaining the ASCO Table, page 9
2. (AUS) Define or modify codes for Australian Public Service and Merit Protection Commission.	Chapter 3, “(AUS) Meeting Regulatory Requirements for Australia,” Creating Reports for the PSMPC, page 9
3. (CAN) Identify job evaluation criteria to meet requirements set by the Pay Equity Act.	Chapter 4, “(CAN) Meeting Regulatory Requirements for Canada,” Quantifying Job Evaluation Criteria, page 14
4. (CAN) Review the National Occupational Classification (NOC) codes for Canadian companies.	Chapter 4, “(CAN) Meeting Regulatory Requirements for Canada,” Reviewing National Occupational Class Codes, page 15
5. (FRA) Group contract types together.	Chapter 5, “(FRA) Meeting Regulatory Requirements for France,” Grouping Contract Types, page 35
6. (FRA) Modify country groupings.	Chapter 5, “(FRA) Meeting Regulatory Requirements for France,” Pages Used to Set Up French Regulatory Reports, page 33
7. (FRA) Update the seven main employee survey groups defined by the French government.	Chapter 5, “(FRA) Meeting Regulatory Requirements for France,” Updating Groups, page 35
8. (FRA) Update the indicators and link the indicators with the relevant application engine section.	Chapter 5, “(FRA) Meeting Regulatory Requirements for France,” Updating Indicators, page 36
9. (FRA) Set up regulatory report information.	Chapter 5, “(FRA) Meeting Regulatory Requirements for France,” Pages Used to Set Up French Regulatory Reports, page 33
10. (NZL) Modify existing classification units or add new classification units used in the calculation of ARCI (Accident Rehabilitation and Compensation Insurance) premiums.	Chapter 7, “(NZL) Meeting Regulatory Requirements for New Zealand,” Defining Classification Units, page 105
11. (GBR) Modify working time directive parameters and defaults.	Chapter 6, “(GBR) Meeting Regulatory Requirements for the United Kingdom,” Setting Up Working Time Directive Parameters, page 97
12. (GBR) Set up U.K. parental and maternity leave data.	<i>PeopleSoft 8.8 Human Resources PeopleBook: Monitor Absence</i> , “(GBR) Tracking Maternity and Parental Leave”
13. (USA) Define affirmative action plans.	Chapter 8, “(USA) Meeting Regulatory Requirements for the United States,” Defining Affirmative Action Plans, page 109
14. (USA) Set up regulatory report information.	Chapter 8, “(USA) Meeting Regulatory Requirements for the United States,” Pages Used to Set Up Control Tables for Regulatory Requirements, page 109
15. (USA) Define job tasks associated with each job code.	Chapter 8, “(USA) Meeting Regulatory Requirements for the United States,” Defining Job Task Codes, page 110
16. (USF) Verify or add Central Personnel Data Files (CPDF) fields.	Chapter 9, “(USF) Performing Central Personnel Data File Edit Processing,” Adding CPDF Fields, page 124

Step	Reference
17. (USF) Specify the CPDF edit number, edit prefix, category and ID, and fields used in the edit.	<u>Chapter 9, “(USF) Performing Central Personnel Data File Edit Processing,” page 123</u>

CHAPTER 2

Understanding PeopleSoft Human Resources Meet Regulatory Requirements

This chapter provides an overview of PeopleSoft Human Resources Meet Regulatory Requirements and discusses:

- PeopleSoft Human Resources Meet Regulatory Requirements business processes.
- PeopleSoft Human Resources Meet Regulatory Requirements integrations.
- Core PeopleSoft Human Resources Meet Regulatory Requirements tables.

PeopleSoft Human Resources Meet Regulatory Requirements

PeopleSoft Human Resources Meet Regulatory Requirements enables you to set up your system to monitor the regulatory requirements for a particular country.

PeopleSoft Human Resources Meet Regulatory Requirements Business Processes

PeopleSoft Human Resources Meet Regulatory Requirements supports the following business processes:

- (AUS) Meet regulatory requirements for Australia.
- (CAN) Meet regulatory requirements for Canada.
- (FRA) Meet regulatory requirements for France.
- (GBR) Meet regulatory requirements for the United Kingdom.
- (NZL) Meet regulatory requirements for New Zealand.
- (USA) Meet regulatory requirements for the United States.
- (USF) Perform central personnel data file edit processing.
- (GBR) (USA) (USF) Meet disability regulatory requirements.

PeopleSoft Human Resources Meet Regulatory Requirements 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 PeopleSoft Human Resources 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”

Core PeopleSoft Human Resources Meet Regulatory Requirements Tables

After you have set up your PeopleSoft HRMS fundamental tables, you will set up the following tables for PeopleSoft Human Resources Meet Regulatory Requirements. The information that you define in the fundamental tables lays the foundation for this setup.

- (AUS) Defining occupational codes per ASCO standard requirements.
- (AUS) Define or modify codes for Australian Public Service (APS) and Public Service Merit Protection Commission (PSMPC).
- (CAN) Identify job evaluation criteria to meet requirements set by the Pay Equity Act.
- (CAN) Review the National Occupational Classification (NOC) codes for Canadian companies.
- (FRA) Group contract types together.
- (FRA) Modify country groupings.
- (FRA) Update the seven main employee survey groups defined by the French government.
- (FRA) Update the indicators and link the indicators with the relevant application engine section.
- (FRA) Set up regulatory report information.
- (NZL) Modify existing classification units or add new classification units used in the calculation of ARCI premiums.
- (GBR) Modify working time directive parameters and defaults.
- (GBR) Set up U.K. Parental and Maternity Leave data.
- (USA) Define affirmative action plans.
- (USA) Set up regulatory report information.

- (USA) Define job tasks associated with each job code.
- (USF) Verify or add Central Personnel Data Files (CPDF) fields.
- (USF) Specify the CPDF edit number, edit prefix, category and ID, and fields used in the edit.

CHAPTER 3

(AUS) Meeting Regulatory Requirements for Australia

This chapter discusses how to:

- Maintain the ASCO table (Australian Standard Classification of Occupations table).
- Create reports for the PSMPC (Public Service and Merit Protection Commission).

Maintaining the ASCO Table

PeopleSoft provides standard ASCO codes. You can modify existing codes or add new codes as ASCO standards change. You can also print a report of the ASCO codes that you use.

Pages Used to Maintain the ASCO Table

Page Name	Object Name	Navigation	Usage
ASCO Table (Australian Standard Classification of Occupations Table)	ASCO_TBL_AUS	Workforce Monitoring, Meet Regulatory Rqmts AUS, Define ASCO Codes, ASCO Table	Define occupational codes per ASCO standard requirements.
ASCO Report - Presruncntl	PRCSRUNCNTL	Workforce Monitoring, Meet Regulatory Rqmts AUS, ASCO Report	Run the ASCO report (PER712AUS) that provides a list of the ASCO reporting codes.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” (AUS) Meet Regulatory Requirements Reports for Australia

Creating Reports for the PSMPC

This section provides an overview of Australian PSMPC reporting and discusses how to:

- Enter additional employee data.
- Process PSMPC reports.

Understanding Australian PSMPC Reporting

The Australian PSMPC requires that all government agencies provide employment details for employees employed under the Public Service Act 1999. Agencies are required to supply this information to the PSMPC in two files that include a range of personal and employment data about the agency's workforce.

The first file, called the *Snapshot* report, describes the state of the agency at a particular point in time. The second file, the *Change* report, describes how the agency has changed over a specific period of time.

The reports supply the employees' current job details. If an employee performs another job for a period of more than 90 consecutive days, then the employee's substantive job is not reported.

Pages Used to Create Reports for the PSMPC

Page Name	Object Name	Navigation	Usage
APS Employee Additional Data (Australian Public Service employee data additional data)	APS_PERSDTA_AUS	Workforce Monitoring, Meet Regulatory Rqmts AUS, APS Employee Additional Data	Enter additional data required for APS reporting.
APS Movement Code (Australian Public Service movement code)	APS_MOVECODE_AUS	Workforce Monitoring, Meet Regulatory Rqmts AUS, Define APS Movement, APS Movement Code	Define or modify codes for changes in employment status. These codes are used by APS for administering human resources functions when employees change positions or job status.
APS Other Language Codes (Australian Public Service other language codes)	APS_LNG_CD_AUS	Workforce Monitoring, Meet Regulatory Rqmts AUS, Define APS Non-English Code, APS Other Language Codes	Define or modify codes for languages used in APS reporting.
APS PSMPC Reporting (Australian Public Service Public Service and Merit Protection Commission reporting)	APS_RUNCTL_AUS	Workforce Monitoring, Meet Regulatory Rqmts AUS, Create APS PSMPC, APS PSMPC Reporting	Process the Snapshot and Change reports for PSMPC reporting.

Entering Additional Employee Data

Access the APS Employee Additional Data page.

APS Employee Additional Data	
Niles, William	Employee EmplID: PU018
Australian Public Service	
Employment Category:	Ongoing
*Engagement Date:	
Previous Work Sector:	Not Given
1st Language Spoken:	
1st Non English Language:	
Mother's Primary Language:	Eng. Only
Father's Primary Language:	Eng. Only
Arrival Year in Australia:	

APS Employee Additional Data page

Employment Category	Select the appropriate category to define the employee's position. Options are <i>Irreg. Duty</i> (irregular duty), <i>Ongoing</i> , <i>Specf Task</i> , (specific task), and <i>Specf Term</i> (specific term).
Engagement Date	Select the date to record the engagement date of the current period of employment in APS.
Previous Work Sector	Select the employee's previous work sector.
1st Language Spoken	Select the language classification.
1st Non English Language	If you select <i>Other</i> (meaning other than English) as the first spoken language, select the employee's first language in this field.
Mother's Primary Language and Father's Primary Language	Select the employee's parents' primary language.
Arrival Year in Australia	Enter the year the employee first arrived in Australia.

Processing PSMPC Reports

Access the APS PSMPC Reporting page.

APS PSMPC Reporting

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

Australian Public Service

Company: AWW Arctic Research Commission

Start Date: 02/16/2000

End Date: 11/13/2002

*Report Type: Change

Contact Phone:

APS PSMPC Reporting page

- Company** Enter the company that you want to report on.
- Start Date and End Date** This date range is the period when employee details are processed.
- For the *Change* report, this date range is the period when change entities specified by APS like maternity leave, postal code has changed on the period specified on the run control.
- For the *Snapshot* report, employees who are active at the end date will be reported.
- Report Type** Select the report type. Options are *Change* and *Snapshot*.
- Contact Phone** Enter a number for the APS employment database project team to call in order to clarify information in the APS employee report.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” (AUS) Meet Regulatory Requirements Reports for Australia

PeopleTools PeopleBook: PeopleSoft Process Scheduler

CHAPTER 4

(CAN) Meeting Regulatory Requirements for Canada

This chapter provides an overview of regulatory requirements for Canada and discusses how to:

- Set up control tables for Canadian regulatory reports.
- Run reports on Canadian control tables.
- Run the Employment Equity report.
- Run Canadian official languages reports.

Understanding Regulatory Requirements for Canada

PeopleSoft Human Resources provides the tools to meet Canadian federal reporting requirements in several areas. You can establish pay equity criteria and generate a report summarizing job classes and related evaluation criteria. To classify jobs for census or other reporting purposes, you need to review and update Canadian standard occupational classification codes.

To meet employment equity and official language reporting requirements, run reports to generate data extract files for loading into two federal government reporting systems: the Employment Equity Computerized Reporting System (EECRS) and the Treasury Board Secretariat's system for reporting on the Official Languages Act (OLA). You don't have to reenter the data that is in PeopleSoft Human Resources, and reports are more accurate.

PeopleSoft provides the following Canadian regulatory reports:

- Employment Equity.
- National Occupational Codes.
- Official Languages Requirements.
- Pay Equity Table.

Setting Up Control Tables for Canadian Regulatory Reports

This section provides pages used to set up Canadian regulatory reporting requirements and discusses how to:

- Quantify job evaluation criteria.

- Review National Occupational Class (NOC) codes.

Pages Used to Set Up Control Tables for Canadian Regulatory Reports

Page Name	Object Name	Navigation	Usage
Canadian Pay Equity Table	CAN_PAY_EQUITY_TBL	Workforce Monitoring, Meet Regulatory Rqmts CAN, Define Canadian Pay Equity, Canadian Pay Equity Table	Quantify job evaluation criteria to meet requirements set by the Pay Equity Act. Associate pay equity job class codes with job codes in the Job Code table.
Canadian Ntl Occ Class Table (Canadian National Occupational Classification table)	CAN_NOC_TABLE	Workforce Monitoring, Meet Regulatory Rqmts CAN, Define Canadian NOC Codes, Canadian Ntl Occ Class Table	Review the NOC codes for Canadian companies and associate NOC codes with job codes in the Job Code table. PeopleSoft delivers an extensive list of NOC codes, which you can change, if necessary.

Quantifying Job Evaluation Criteria

Access the Canadian Pay Equity Table page.

Canadian Pay Equity Table

Job Class: KC1

Pay Equity Details Find | View All First 1 of 1 Last

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

Job Comparison Criteria

Pay Equity Effort Points:	1,000
Pay Equity Responsibility Pts:	500
Pay Equity Working Cond Points:	400
Pay Equity Skill Points:	300
Pay Equity Total Points:	2,200

Canadian Pay Equity Table page

Job Comparison Criteria

Design the point system used in this group box. Determine and enter points by comparing each of the factors to every other job class in the company. For example, you might assign more pay equity skill points to an engineer job class than a mailroom clerk job class because the engineering job requires more education and experience.

Pay Equity Effort Points	Enter points for the physical and mental effort required to perform a job.
Pay Equity Responsibility Pts (pay equity responsibility points)	Enter points for decision-making and responsibility for people, equipment, and budgets.
Pay Equity Working Cond Points (pay equity working conditions points)	Enter points for the working environment, including dirt, noise, stress, and health risks.
Pay Equity Skill Points	Enter points for the education, experience, and special abilities that are required to perform a job in this job class.
Pay Equity Total Points	Displays the total points as you enter points.

Reviewing National Occupational Class Codes

Access the Canadian Ntl Occ Class Table page.

Canadian Ntl Occ Class Table

National Occupational0011

NOC Details

Find | View AllFirst1 of 1Last

*Effective Date:

01/01/1900

+

-

*Description:

Legislators

NOC Occupational Group:

01

Senior Managers

Can OEE Skill Level:

N/A

Canadian Ntl Occ Class Table page

NOC Occupational Group (National Occupational Classification occupational group)	Select the group to which this job classification code belongs. Occupational group codes are included in the Translate table.
Can OEE Skill Level (Canadian Ontario Employment Equity skill level)	Select from the list of values.

Running Reports on Canadian Control Tables

This section discusses how to run reports on Canadian control tables.

Page Used to Run Reports on Canadian Control Tables

Page Name	Object Name	Navigation	Usage
Pay Equity – Run Control	PRCSRUNCNTL	Workforce Monitoring, Meet Regulatory Rqmts CAN, Reports, Pay Equity	Run the Pay Equity Table report (PER715CN), which lists evaluation information, and the National Occupation Codes report (PER716CN), which lists the NOC codes used in categorizing job codes.

Running the Employment Equity Report

This section provides overviews of employment equity reporting, Employment Equity report files, employee inclusion in the Employment Equity report, and salary calculation, and discusses how to run the Employment Equity report.

Understanding Employment Equity Reporting

If you're a federally regulated employer in Canada and required to report to the federal government on employment equity, PeopleSoft Human Resources provides the Canadian Employment Equity 2.0 interface—the Employment Equity report (PER101CN)—which creates three data interface files for the federal government's Employment Equity Computerized Reporting System (EECRS). You don't have to enter the data in the database and then reenter the same data in EECRS each year.

The report retrieves extensive data for all Canadian employees in the organization who were active employees at any point during the calendar year. The report includes up to four promotion dates per employee within a given year, in ascending order.

The Employment Equity report is based on the interpretation of Employment Equity Reporting Guideline 11, as published by Human Resources Development Canada (HRDC). Because the interpretation of the guidelines can vary, there may be differences between your requirements and the rules that PeopleSoft has built into the generic solution. If the data imported into the EECRS does not meet Guideline 11, either modify the information once it has been imported into the EECRS or modify the Employment Equity report.

You are responsible for reporting accurate information to HRDC. The HRDC is the source of interpretation and final authority on all matters related to employment equity reporting, including the definition of salary and its rules for annualization and non-annualization. PeopleSoft doesn't assume this role.

Understanding Employment Equity Report Files

The Employment Equity report creates three files: employee.txt, promo.txt, and term.txt. The employee file includes information on temporary and permanent employees. The following tables lists the field names in each report file, the fields in PeopleSoft HRMS from which the report retrieves the data, and the tables where the fields are located.

Employee File

The following table lists the fields and tables used to create the employee.txt file:

EECRS Report Field Name	PeopleSoft Field	PeopleSoft Table	Notes
Employee # (employee number)	Employee ID	PERSONAL_DATA	
CMA Code (Census Metropolitan Area code)	Census Metropolitan Area	LOCATION_TABLE	Based on the location code in the employee job record, the report uses the CMA associated with that location code in the LOCATION_TBL table.
Province Code	Numeric Code	STATE_NAMES_TBL	Based on the location code in the employee job record, the report uses the numeric code associated with that location code in the LOCATION_TBL table.
NOC Code (National Occupational Classification code)	Canadian NOC Code (Canadian National Occupational Classification code)	JOBCODE_TBL	Based on the job code in the employee job record, the report uses the NOC code associated with the job code in the JOBCODE_TBL table.
SIC Code (Standard Industrial Classification code)	Canadian Industrial Sector	DEPT_TBLCAN_SBR	Based on the department ID in the employee job record, the report uses the SIC associated with that department ID in the DEPT_TBL table.
Employee Type Code	Temporary Full-/Part-Time Other	Derived value based on rules in Structured Query Report (SQR); data from a combination of PERSONAL_DATA and EMPLOYMENT records.	See Chapter 4, “(CAN) Meeting Regulatory Requirements for Canada,” <u>Understanding Inclusion of Employees in the Employment Equity Report</u> , page 18.
Employee Type Comment	Employment Status Full-Time Student	Derived value based on rules in SQR; data from a combination of PERSONAL_DATA and EMPLOYMENT records.	See Chapter 4, “(CAN) Meeting Regulatory Requirements for Canada,” <u>Understanding Inclusion of Employees in the Employment Equity Report</u> , page 18.
Gender	Sex	PERSONAL_DATA	
Last Name	Name	PERSONAL_DATA	
Given Name	Name	PERSONAL_DATA	
Salary	Annual Rate	JOB	See Chapter 4, “(CAN) Meeting Regulatory Requirements for Canada,” <u>Understanding Salary Calculation</u> , page 20.

EECRS Report Field Name	PeopleSoft Field	PeopleSoft Table	Notes
Aboriginal	Aboriginal	PERSONAL_DATA	
Visible Minority	Visible Minority	PERSONAL_DATA	
Disabled	Disabled	PERSONAL_DATA	
Hire Date	Hire Date	EMPLOYMENT	
Termination Date	Termination Date	EMPLOYMENT	

Promotion File

The following table lists the fields and tables used to create the promo.txt file:

EECRS Report Field Name	PeopleSoft Field	PeopleSoft Table	Notes
Employee #	Employee ID.	PERSONAL_DATA	
Promotion # (promotion number)	Derived values from SQR program; sequential count.	Based on a number of job records that meets appropriate criteria as defined by EECRS reporting rules.	
Promotion Date	Derived value from EFF_DT.	JOB	

Temporary Terms File (for Temporary Employees)

The following table lists the fields and tables used to create the term.txt file:

EECRS Report Field Name	PeopleSoft Field	PeopleSoft Table	Notes
Employee #	Employee ID	PERSONAL_DATA	
Term # (term number)	Derived field; sequential count.	CONTRACT_DATA	
Start Date	CONTRACT BEGIN_DT	CONTRACT_DATA	
End Date	CONTRACT END_DT	CONTRACT_DATA	
Completed Date	Termination Date	EMPLOYMENT	Temporary employees only.

Understanding Inclusion of Employees in the Employment Equity Report

The Employment Equity report includes any employee in a Canadian regulatory region during the reporting year. This includes employees who were hired, rehired, transferred, or terminated, and anyone who was active, on leave, or suspended during the year.

The job record used in the data files includes the maximum effective date and effective sequence that is less than or equal to the year end. This may be a record from before the current year if an employee has had no job activity during the reporting year.

The minimum employee record number is used if more than one job is present. Data from personal data, diversity, disability, and employment records appears as of the report's run date. Data from the tables JOBCODE_TBL, DEPT_TBL, and LOCATION_TBL appears as of the end of the year.

Employees With Multiple Jobs

For employees with multiple jobs, the report provides information on only one job. The report selects the job to include based on these criteria:

- Active job.
- Full-time job.
- Job with the highest salary.

The employee salary is reported as the sum of all job salaries.

Determination of Employee Type

Two fields in the employee.txt file are related to employee type: Employee Type and Employee Type Description (for an employee type categorized as *Other (04)*).

The system determines the appropriate category for each EECRS employee type:

Full-Time (01)	REG_TEMP = 'R' (regular) FULL_PART_TIME = 'F' (full-time) EMPL_STATUS not in (L,P,S) FT_STUDENT <> 'Y'
Part-Time (02)	REG_TEMP = R FULL_PART_TIME <> 'F' EMPL_STATUS not in (L,P,S) FT_STUDENT <> 'Y'
Temporary (03)	REG_TEMP = 'T' EMPL_STATUS not in (L,P,S) FT_STUDENT <> 'Y'
Other (04)	EMPL_STATUS in (L,P,S) or FT_STUDENT = 'Y' or (EMPL_STATUS not in (L,P,S) and has not worked in this reporting year (using LAST_DATE_WORKED)) Supersedes <i>Full-Time</i> , <i>Part-Time</i> , <i>Temporary</i> , and <i>Casual</i> .
Casual (05)	Employees who would otherwise be temporary but whose combined start and end dates (from contract data) add up to fewer than 12 weeks during the reporting year.

If the employee type code is *Other (04)*, the description field is populated as follows:

Full-Time Student	FT_STUDENT = 'Y'
On Leave of Absence	EMPL_STATUS = L,P
Terminated and hasn't worked during the year	EMPL_STATUS = T,U
Retired and hasn't worked during the year	EMPL_STATUS = R,Q
Deceased and hasn't worked during the year	EMPL_STATUS = D

Last Date Worked not in reporting year and not null LAST_DATE_WORKED <>Null and <Reporting Year

Understanding Salary Calculation

The following stipulations regarding salary definition and calculation apply to Employment Equity Reporting Guideline 11:

- Salary should be annualized in some situations.
- If two activities with respect to earnings or job take place in a year, one of which requires annualization and one that does not, then the most recent activity takes priority.

For example, if a new hire (annualized) is laid off that same year (non-annualized), the employee's salary should be non-annualized for this report.
- The salary figure includes salary, wages, commissions, tips, bonuses, and piece rates, but not overtime wages.
 - When salary isn't annualized, the default salary figure provided is pulled from the CIT YTD tax in CAN_TAX_BALANCE field.

This information does not include overtime. If overtime is allowed, modify the data manually in the report files or modify the PER101CN report.

- Annualized salary does not include overtime.

Annualized salary information uses the ANNUAL_RT field. If you are not using PeopleSoft Payroll, the ANNUAL_RT is used in all circumstances.

Important! The final authority in interpretation of annualization or non-annualization rests with Human Resources Development Canada (HRDC). You have the final responsibility for compliance with the EECRS reporting rules.

Salary Annualization

The following table shows when salary is annualized and how the Employment Equity report handles each situation. Note cases in which you must modify the report manually for accurate results.

Employment Equity Report Annualization	Interface Functionality
New hires and promotions during the reporting period.	The Employment Equity report annualizes using ANNUAL_RT.
Unpaid leaves of absence granted at the request of employees who returned to work on or before December 31.	The Employment Equity report annualizes using ANNUAL_RT; however, paid leaves are non-annualized. If unpaid leave is still active at December 31, it is non-annualized.
New hires with a salary including commission; add salary and commission and annualize total.	The Employment Equity report annualizes using ANNUAL_RT. Modify the provided figure manually in EECRS.

Employment Equity Report Annualization	Interface Functionality
New hires with steady base salary; annualize only base salary and then add commission.	The Employment Equity report annualizes using ANNUAL_RT. Modify the provided figure manually in EECRS.
Transferred employees as a result of a corporate transaction; employees considered new hires.	PeopleSoft Human Resources does not specify how to complete corporate transactions. If you have terminated employees from one company and hired them in another one as the means of corporate transfer, they appear as new hires and PER101CN annualizes using ANNUAL_RT. Otherwise, modify the figure manually within EECRS.

The following table shows when salary is not annualized and how the Employment Equity report handles each situation. Note cases in which you must modify the report manually for accurate results.

No Employment Equity Report Annualization	Interface Functionality
Temporary employees.	The SQR categorizes them as employee type <i>Temporary (03)</i> .
Seasonal workers who have worked a complete season.	All seasonal workers are considered to have worked a complete season. PeopleSoft Human Resources does not use partial seasons.
Seasonal workers who work part of a season.	All seasonal employees are considered to have worked a complete season and do not have their salary annualized by the Employment Equity report. Modify data in EECRS manually if employees worked an incomplete season.
Employees who are temporarily laid off.	The SQR categorizes them as employee type <i>Other (04)</i> .
Employees recalled in accordance with the mid year collective agreement.	The Employment Equity report does not annualize.
Striking employees.	The Employment Equity report does not annualize.
Permanent employees working part of the year as full-time employees.	The Employment Equity report does not annualize.

No Employment Equity Report Annualization	Interface Functionality
Acting assignments.	PeopleSoft Human Resources does not take these situations into account. Modify the provided figure manually in EECRS.
New hires with fluctuating base salary and commission.	PeopleSoft Human Resources does not take these situations into account. Modify the provided figure manually in EECRS.
Employees with commission-only salary.	PeopleSoft Human Resources does not take these situations into account. Modify the provided figure manually in EECRS.
Employees who change employment status mid year (temp to part-time, part-time to full-time, and so on).	Modify the provided figure manually in EECRS.

Page Used to Run the Employment Equity Report

Page Name	Object Name	Navigation	Usage
Employment Equity	RUNCTL_PER101CN	Workforce Monitoring, Meet Regulatory Rqmts CAN, Reports, Employment Equity, Employment Equity	Run the Employment Equity report (PER101CN). This SQR creates an interface file that you can export to Canadian Employment Equity software.

Running the Employment Equity Report

Access the Employment Equity page.

Importing the Report Into EECRS

When you import the interface file into EECRS, you have two options: merge the existing file or overwrite it. The default is to overwrite the file because normally you submit information for the whole organization at the same time.

If divisions in the organization prepare their information separately and you need to combine division files, you may need to use the merge option. Keep in mind that the merge option creates duplicate records. The EECRS software does not warn you about duplicate records or issue error messages. For this reason, the Canadian government strongly recommends that you back up your final files. Because you can inadvertently delete or overwrite existing employee data in EECRS, backing up your files ensures that you retain accurate records of the information submitted each year.

The Employment Equity report does not extract information about employers. Before you run the final report using the EECRS software, enter values in the EECRS Employer Information fields.

Troubleshooting

The Employment Equity report detects errors that can prevent the EECRS from successfully importing data.

If you find that records are missing from the import files when you run the Employment Equity report, information that is required for the EECRS report may not be included in the online pages. The PER101CN.LIS file identifies these situations and produces an error message.

Running Canadian Official Languages Reports

Canadian federal institutions are required to report on the official languages used in their departments in accordance with the Official Languages Act (OLA). PeopleSoft Human Resources provides the Canadian Official Language Data File report and the Canadian Official Languages reports.

This section provides overviews of the Canadian Official Language Data File report and the Canadian Official Language reports and discusses how to run the Canadian Official Language Data File report.

Understanding the Canadian Official Language Data File Report

The Canadian Official Language Data File report (PER102CN) creates an import file used by the Official Languages Information System (OLIS II) software, which is required under the OLA to report official language information. The report captures information about permanent employees and temporary employees who work for periods of six months or more.

The following table lists the field names in the report, the fields in PeopleSoft HRMS from which the report retrieves the data, and the tables where the fields are located.

OLA Report Field Name	PeopleSoft Field	PeopleSoft Table	Notes
Institution Code	Institution Code	COMPANY_TBL	
Record ID	Employee ID	PERSONAL_DATA	
First Official Language	Preferred Language	PERSONAL_DATA	
Occupational Category	Occupational Category	JOBCODE_TBL	Based on the job code in the employee job record, the report uses the occupational category associated with the job code in the JOBCODE_TBL table.
Language of Service to Public	Pub Svc Lng Can (public service language Canada)	PERS_OFFLNG_CAN	
Language of Internal Service to NCR	Intrl Ncr Lng Can	PERS_OFFLNG_CAN	
Language of Internal Service to Ontario North and East	Intrl On Lng Can (internal Ontario language Canada)	PERS_OFFLNG_CAN	
Language of Internal Service to Montreal	Intrl Mnt Lng Can (internal Montreal language Canada)	PERS_OFFLNG_CAN	
Language of Internal Service to Bilingual Quebec-Other	Intrl Qc Lng Can (internal Quebec language Canada)	PERS_OFFLNG_CAN	

OLA Report Field Name	PeopleSoft Field	PeopleSoft Table	Notes
Language of Internal Service to New Brunswick	Intrl NB Lng Can (internal New Brunswick language Canada)	PERS_OFFLNG_CAN	
Bilingualism Code	Bilingualism Code	PERSONAL_DATA	
Comm Req Supervision to NCR	Supr Comm Ncr Can	PERS_OFFLNG_CAN	
Comm Req Supervision to Ontario North & East	Supr Comm On Can	PERS_OFFLNG_CAN	
Comm Req Supervision to Montreal	Supr Comm Mnt Can	PERS_OFFLNG_CAN	
Comm Req Supervision to Bilingual Quebec-Other	Supr Comm Qc Can	PERS_OFFLNG_CAN	
Comm Req Supervision to New Brunswick	Supr Comm Nb Can	PERS_OFFLNG_CAN	
TBS Office Code	Office Cd Can	LOCATION_TBL	

Understanding the Canadian Official Language Reports

The Canadian Official Language reports (PER108CN) provide summary information that is required by the OLA. The reports assume an as of date of December 31 of the current year, unless another date is specified. There are five summary reports that are produced in a print format:

- Participation by Province.
- Participation by Occupational Category.
- Service to Public by Bilingual Office/Point of Service.
- Internal Service to Bilingual Regions.
- Supervision in Bilingual Regions.

Participation by Province

The Participation by Province summary report includes individuals whose most recent job record has a REG_REGION value equal to *CAN* and an EMPL_STATUS value equal to *A*, *L*, *P*, or *S*.

The following table lists the report field names, the fields in PeopleSoft HRMS from which the reports retrieve the data, and the tables where the fields are located.

OLA Summary Report Field Name	PeopleSoft Field	PeopleSoft Table	Notes
Occupational Category	CAN_NOC_CD	JOBCODE_TBL	The Occupational Category field displays one of five occupational categories that corresponds to the CAN_NOC_CD code in the JOBCODE_TBL table. The categories are: • 91-Managers • 92-Professionals • 93-Specialists & Technicians • 94-Administrative Support • 95-Operational
Total # of Employees (total number of employees)	CAN_NOC_CD	JOBCODE_TBL	The count of selected employees with that occupational category.
Total # of Employees First Official Languages English	LANGUAGE_CD	PERSONAL_DATA	The count of selected employees in the selected group who have a language code that isn't equal to <i>CFR</i> or <i>FR</i> . If the employee's language isn't French, then the report uses English.
Total # of Employees First Official Languages French	LANGUAGE_CD	PERSONAL_DATA	The count of selected employees in a selected group who have a language code that is equal to <i>CFR</i> or <i>FR</i> .

Service to Public by Bilingual Office/Point of Service

The Service to Public by Bilingual Office/Point of Service summary report includes individuals whose most recent job record has an EMPL_STATUS value equal to *A*, *L*, *P*, or *S* and whose OFF_LNG_RQMT_CAN record has a PUB_SVC_LNG_CAN value of either *French*, *English*, or *Bilingual*.

Employees with a *Bilingual* value in the PUB_SVC_LNG_CAN field are counted in both the French and English columns, resulting in values that may total more than the value in the Resources Serving the Public field. This is according to the OLIS II guidelines.

The following table lists the report field names, the fields in PeopleSoft HRMS from which the reports retrieve the data, and the tables where the fields are located.

OLA Summary Report Field Name	PeopleSoft Field	PeopleSoft Table	Notes
Province	LOCATION_DESCR	LOCATION_TBL	
Location	STATE_TBL.DESCR	STATE_TBL	
Office Code	LOCATION_TBL.TBS_OFFICE_CD_CAN	LOCATION_TBL	
Resources Servicing the Public	PUB_SVC_LNG_CAN	OFF_LNG_RQMT_CAN	The count of selected employees at that location.
Resources Serving in English	PUB_SVC_LNG_CAN	OFF_LNG_RQMT_CAN	The count of selected employees at that location with a PUB_SVC_LNG_CAN value of either <i>English</i> or <i>Bilingual</i> .
Resources Serving in French	PUB_SVC_LNG_CAN	OFF_LNG_RQMT_CAN	The count of selected employees at that location with a PUB_SVC_LNG_CAN value of either <i>French</i> or <i>Bilingual</i> .

Internal Services to Bilingual Regions

The Internal Services to Bilingual Regions summary report includes individuals whose most recent job record has a REG_REGION value equal to *CAN* and an EMPL_STATUS value equal to *A*, *L*, *P*, or *s*. Individuals must also have a value of either *English*, *French*, or *Bilingual* in any of the following fields on the OFF_LNG_RQMT_CAN page:

- INTRL_ON_LNG_CAN
- INTRL_NCR_LNG_CAN
- INTRL_MNT_LNG_CAN
- INTRL_QC_LNG_CAN
- INTRL_NB_LNG_CAN

Employees with a *Bilingual* value in any of these internal services fields are counted in both the French and English columns, resulting in values that may total more than the value in the Internal Services to Bilingual Regions field. This is according to the OLIS II guidelines.

The following table lists the report field names, the fields in PeopleSoft HRMS from which the reports retrieve the data, and the tables where the fields are located.

OLA Summary Report Field Name	PeopleSoft Field	PeopleSoft Table	Notes
Internal Services to Employees In: • National Capital Region • Ontario North & East • Montreal • Bilingual Quebec-Other • New Brunswick • Total	INTRL_NCR_LNG_CAN INTRL_ON_LNG_CAN INTRL_MNT_LNG_CAN INTRL_QC_LNG_CAN INTRL_NB_LNG_CAN	OFF_LNG_RQMT_CAN	
Resources Providing Internal Services	INTRL_NCR_LNG_CAN INTRL_ON_LNG_CAN INTRL_MNT_LNG_CAN INTRL_QC_LNG_CAN INTRL_NB_LNG_CAN	OFF_LNG_RQMT_CAN	Displays the count of employees who have a value of <i>English</i> , <i>French</i> , or <i>Bilingual</i> in the Internal Languages field for each region.
Resources Serving in English	INTRL_NCR_LNG_CAN INTRL_ON_LNG_CAN INTRL_MNT_LNG_CAN INTRL_QC_LNG_CAN INTRL_NB_LNG_CAN	OFF_LNG_RQMT_CAN	Displays the count of employees who have a value of English or Bilingual in the Internal Languages field for each region.
Resources Serving in French	INTRL_NCR_LNG_CAN INTRL_ON_LNG_CAN INTRL_MNT_LNG_CAN INTRL_QC_LNG_CAN INTRL_NB_LNG_CAN	OFF_LNG_RQMT_CAN	Displays the count of employees who have a value of <i>French</i> or <i>Bilingual</i> in the Internal Languages field for each region.

Supervision in Bilingual Regions

The Supervision in Bilingual Regions summary report includes individuals whose most recent job record has a REG_REGION value equal to *CAN* and an EMPL_STATUS value equal to *A*, *L*, *P*, or *S*. Individuals must also have a value of either *English*, *French*, or *Bilingual* in any of the following fields on the OFF_LNG_RQMT_CAN page:

- SUPR_COMM_ON_CAN
- SUPR_COMM_NCR_CAN
- SUPR_COMM_MNT_CAN
- SUPR_COMM_QC_CAN
- SUPR_COMM_NB_CAN

The following table lists the report field names, the fields in PeopleSoft HRMS from which the reports retrieve the data, and the tables where the fields are located.

OLA Summary Report Field Name	PeopleSoft Field	PeopleSoft Table	Notes
Bilingual Supervision:			
To Supervise Employees in NCR	SUPR_COMM_NCR_ CAN	OFF_LNG_RQMT_CAN	
To Supervise Employees in Ontario North & East	SUPR_COMM_ON_ CAN		
To Supervise Employees in Montreal	SUPR_COMM_MNT_ CAN		
To Supervise Employees in Bilingual Quebec-Other	SUPR_COMM_QC_ CAN		
To Supervise Employees in New Brunswick	SUPR_COMM_NB_ CAN		
Total			

OLA Summary Report Field Name	PeopleSoft Field	PeopleSoft Table	Notes
The Number of Supervisors Required to Be Bilingual	SUPR_COMM_NCR_CAN SUPR_COMM_ON_CAN SUPR_COMM_MNT_CAN SUPR_COMM_QC_CAN SUPR_COMM_NB_CAN	OFF_LNG_RQMT_CAN	Displays the count of employees who have a value of Bilingual in the Supervisors Required field for each region.
Of These, the Number Qualified to Carry Out Their Duties in Both Official Languages	SUPR_COMM_NCR_CAN SUPR_COMM_ON_CAN SUPR_COMM_MNT_CAN SUPR_COMM_QC_CAN SUPR_COMM_NB_CAN	PERSONAL_DATA	

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports”

Page Used to Run Canadian Official Languages Report

Page Name	Object Name	Navigation	Usage
Official Language Rqmts (official language requirements)	RUNCNTL_PER102CN	Workforce Monitoring, Meet Regulatory Rqmts CAN, Reports, Official Language Requirements, Official Language Rqmts	Run the Canadian Official Languages Data File SQR (PER102CN), which creates an import file to report official languages information.

CHAPTER 5

(FRA) Meeting Regulatory Requirements for France

This chapter provides an overview of French regulatory requirements and discusses how to:

- Set up French regulatory reports.
- Run the Disability report (DIS001).
- Manage elections and run the Election report (ELE001).
- Prepare and run the Employee Survey report (SOC001).
- Run workforce reporting statutory reports.
- Prepare and run the Training 2483 report (TRN029).

Understanding French Regulatory Requirements

PeopleSoft Human Resources provides resources for managing and reporting on various types of data that are required by French government regulations. PeopleSoft provides the following French regulatory reports:

- Disability.
- Election.
- Employee Survey.
- Monthly Workforce (REG001FR).
- Personal Register (REG002FR).
- Training 2483.
- Workforce by Nationality (REG003FR).
- Single Hiring Statement (HRSHSFRA).
- BIAF report (*Bordereau Individuel d'Accès à la Formation* report) (REG004FR).

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” (FRA) Meet Regulatory Requirements Reports for France

Prerequisites

Set up control tables using the following pages before running French regulatory reports:

Control Table Page	Description
APE Table (<i>activite principale exercee</i> table)	Classify the company's primary industry, such as software, banking, or insurance. The APE codes are mandated by French law.
External Variables	Enter information related to salaries and social security ceilings that are established by the French government each year, and enter the disability rates for the Disability report.
INSEE Table FRA (National Institute For Statistical And Economical Studies table France)	Input the INSEE codes for the company's job codes. Then map the company's job codes to one of the INSEE codes.
FRA Pension/Cont. Funds Table - Institution Type and FRA Pension/Cont. Funds Table - Institution Add.	Enter address and location details about the institutions that provide pensions to the employees.
URSSAF Code (<i>Union de Recouvrement de la Sécurité Sociale et des Allocations Familiales</i> code)	Store the codes of the local URSSAF offices. This government agency collects employee and employer contributions made for illness and work accidents.
Trn 2483 Parameters (Training 2483 parameters)	Enter data required for the 2483 report. Much of the information required for the 2483 report is stored in the PeopleSoft Human Resources system and payroll system.

In addition to setting up the control tables, you must set up Training 2483 report groups and indicators. Review and update the seven main groups of indicators defined by the French government for the different types of employee surveys. Then link these groups to the appropriate columns on the Employee Survey report.

Setting Up French Regulatory Reports

This section provides an overview of pages with system-populated fields and discusses how to:

- Group contract types.
- Update groups.
- Update indicators.

Understanding Pages With System-Populated Fields

The following pages are populated with system data:

- Mandatory Base Scheme.
- Kind of Contract.
- Category Status.
- Covered Population.
- Job Category.
- Medical Organization.
- Population Category.
- Professional Status.

On these pages, you can modify, delete, and add new codes. As legislative changes occur, you can easily update this data to comply with French legislation that applies to your organization. In some cases, not all the system data is populated, because only a few parts of this information may be relevant to your organization.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Setting Up Local Country Functionality,” (FRA) Setting Up French Control Tables

Pages Used to Set Up French Regulatory Reports

Page Name	Object Name	Navigation	Usage
Contract Type Group	CNTRCT_TYPE_GRP	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Contract Type Group	Group contract types together. Before using this page, set up the Contract Type table.
Country Group	COUNTRY_GRP	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Country Group	Modify country groupings. Before using this page, set up the Country table.
Employee Survey Group	GROUP_SHEETTBL_FRA	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Define Empty Survey Indicators, Employee Survey Group	Update the seven main groups defined by the French government.
Employee Survey Indicator	INDIC_SHEETTBL_FRA	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Define Empty Survey Indicators, Employee Survey Indicator	Update the indicators and link the indicators with the relevant application engine section.
Election Group	ELECTION_GR_TBL	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Election Group	Define the various groups that are active in the company.

Page Name	Object Name	Navigation	Usage
Election Roll	ELECTION_RL_TBL	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Election Roll	Define the election rolls or candidacies.
Mandatory Base Scheme	BSE_SCH_FRA_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, Base Scheme, Mandatory Base Scheme	Define the base scheme necessary for DADS, a French payroll report.
Kind of Contract	CTC_KND_FRA_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, Kind of Contract	Define the kind of contracts needed for DADS.
Category Status	CTG_STS_FRA_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, Category Status	Define the category status needed for French payroll and DADS.
Covered Population	CVD_POP_FRA_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, Covered Population	Define the covered population needed for DADS, a French payroll report.
Job Category	JOB_CTG_FRA_TBL	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Job Category	Define the job categories used in the company. This information is required for the Single Hiring Statement report.
Previous Employment Situation	WRK_EXP_FRA_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, Previous Employment Situations, Previous Employment Situation	Review and update the previous employment codes used for the Single Hiring Statement report.
Medical Organization	MED_ORG_FRA_TBL	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, Medical Organization	Define the medical organizations used in the company. This information is required for the Single Hiring Statement report.
Population Category	POP_CTG_FRA_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, Population Category	Define the population categories used by your company. Needed for DUCS, a French payroll report.
Professional Status	PRF_STS_FRA_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, Professional Status	Define the professional status used in the company; this information is required for DADS.

Page Name	Object Name	Navigation	Usage
FONGECIF Table (Fonds de Gestion du Conge Individuel de Formation table)	FONGECIF_FRATBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, FONGECIF Table	Enter the names and addresses of the training organizations responsible for managing individual training leave (<i>congé individuel de formation</i>) and competency assessment (<i>bilan de compétence</i>). These codes are assigned to establishments and used in the BIAF report.

Grouping Contract Types

Access the Contract Type Group page.

Contract Type Group

Group Name: REG001FR

*Effective Date: 01/01/1900

Status: Active

*Description: Used by REG001FR

Short Description: REG001FR

*SetID	*Contract Type	Description
FRA	ACE	Access to First Job Contract
FRA	ADA	Adaptation Contract
FRA	ADD	Fixed Term Adaption Contract

Contract Type Group page

SetID and Contract Type Enter or look up a setID and a contract type to associate with this group name.

Updating Groups

Access the Employee Survey Group page.

Employee Survey Group		Employee Survey Indicator	
Type of Employee Survey: Trade & Services Company		Indicator Group: 1	
*Description:	Employment		
Short Description:	Employment		
Comment:			
Number of Columns:		4	
Descr. 1	Descr. 2	Descr. 3	Descr. 4
Executive	Act Exec	Worker	Total

Employee Survey Group page

Note. All groups and nearly all indicators that you must prepare for the Employee Survey report already exist in the Employee Survey Group table and the Employee Survey Indicator table as system data; however, the Employee Survey process does not determine all indicators. The system determines about half of the indicators. Use the Employee Survey Group setup page and the Employee Survey Indicator setup page to modify these groups and indicators, if necessary.

Number of Columns

Enter the number of columns on the Employee Survey report. When you change the number of columns, a corresponding number of Descr. (description) fields appear on the page.

The columns (number and value) are used as defaults when you add a new indicator. The report displays only the columns defined on the Employee Survey Indicator page.

Updating Indicators

Access the Employee Survey Indicator page.

Employee Survey Group Employee Survey Indicator

Type of Employee Survey: Trade & Services Company Indicator Group: 1 Employment

Find | View All First 1 of 51 Last

*Indicator: 111

*Description: Total Workforce

Short Description: 111

Comment: Total workforce as of 12/31. Part-time workers are taken into account; non-employees are not retrieved.

Number of Columns: 4

Descr. 1: Executive Descr. 2: Act Exec Descr. 3: Worker Descr. 4: Total

Application Engine

Section: IND111

☐ Payroll Related

Employee Survey Indicator page

Number of Columns

Displays the total number of columns and the corresponding column descriptions that are entered on the Employee Survey Group page. The number of Descr. (description) fields that appear at the bottom of the page is linked to the value that you enter in the Number of Columns field.

The descriptions that you enter are the headings for the categories, or columns, on the report. In this example, the *Employment* group displays the following columns in the report: *Executive*, *Act Exec*, *Worker*, and *Total*.

Application Engine

More than 60 PeopleSoft Application Engine processes are built into PeopleSoft Human Resources for the majority of the indicators.

Section

Enter the section of the employee survey that PeopleSoft Application Engine should calculate for the given indicator.

Note. When the value is set to *NO*, it means that there is no PeopleSoft Application Engine process for the indicator. Changing this value without modifying the Application Engine results in an error and stops the overall process.

Payroll Related

Select to calculate this indicator. A payroll-related indicator is computed only if PeopleSoft Global Payroll is installed.

Note. When the columns are changed, the related indicator in PeopleSoft Application Engine should be modified to fill the columns properly. You must make these changes to the process manually.

See Also

PeopleTools PeopleBook: PeopleSoft Application Engine

Running the Disability Report

This section provides an overview of French disability reporting, lists common elements, and discusses how to run the Disability report.

Understanding French Disability Reporting

French legislation of 1987 requires firms with more than 20 employees to hire qualified disabled people. Before hiring the disabled person, the employer is required to notify the proposed employee's social security commission, COTOREP (*Commission Technique d'Orientation et de Reclassement Professionnel*), in an effort to combat fraud.

When you run the French Disability report, it calculates the theoretical number of disabled employees that your company should hire by multiplying the disability rate by the number of people in the calculation population. The system determines the calculation population by subtracting those people who have special job codes that are defined by the INSEE (National Institute for Statistical and Economical Studies) or who are external consultants or trainees from the total population of your organization. The report also lists all the disabled employees employed by your company. Based on this report, the French government determines if your company complies with the law.

To prepare this report, ensure that you enter the correct codes in the INSEE table and have the correct Disability Rate code in the External Variables table.

Common Elements Used in This Section

Company Total Population	Displays the total company population. Each PeopleSoft Human Resources French job code is linked to a four-digit INSEE socio-professional category description (<i>classification par categorie socio-professionnelle [PCS]</i>) code. The first table of the report lists all the PCS codes corresponding to a job code within your company, their description, and the number of men or women in each category.
Jobs Requiring Special Abilities	Displays exempt job codes and the number of men or women in the company's population who must be excluded from the calculation population. Exempt job codes define jobs that require capabilities incompatible with any kind of disability.
Reference Population	Displays the total population minus consultants and trainees but including the excluded jobs.
Calculation Population	Displays the total population minus the consultants, trainees, and excluded jobs.
Calculated Number of Disabled Employees	Displays the calculated, theoretical number of disabled employees whom the company should hire to comply with the law.

Page Used to Run the Disability Report

Page Name	Object Name	Navigation	Usage
Disability Report	RUNCTL_DIS001_FRA	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Disability, Disability Report	Run the Disability report. This report calculates the theoretical number of disabled employees who should work for the company and lists the disabled employees, excluding temporary workers, trainees, and apprentices.

Running the Disability Report

Access the Disability Report page.

Before running this report, enter the correct codes in the INSEE table and the correct disability rate code in the External Variables table.

Managing Elections and Running the Election Report

This section provides an overview of French professional elections reporting and discusses how to:

- Define an election.
- Record candidacies for election groups.
- Enter voting results.
- Validate election results.
- Determine elected candidates.

Understanding French Professional Elections Reporting

PeopleSoft Human Resources enables you to monitor professional elections for personnel representatives (*delegates du personnel*) and members of the work council (*comite d'entreprise*) in your organization if you are doing business in France.

Companies with more than 11 employees must elect personnel representatives to represent all of the employees before management. Companies with more than 50 employees must elect a work council to represent the employees in negotiations with management. Normally, the elections are every two years and follow stringent procedures.

Once you enter the election data, run the Election report to show the results of the elections to the employees and management.

Pages Used to Manage Elections and Run the Election Report

Page Name	Object Name	Navigation	Usage
Maintain Election Data - Group	ELECTION_GROUP	Workforce Monitoring, Meet Regulatory Rqmts FRA, Election Monitoring, Maintain Election Data, Group	Define the characteristics of an election.
Maintain Election Data - Roll	ELECTION_ROLL	Workforce Monitoring, Meet Regulatory Rqmts FRA, Election Monitoring, Maintain Election Data, Roll	Record candidacies for the groups in the election. Each trade union in the company delivers a list of candidates (incumbents and substitutes) for the election that you enter on this page.
Maintain Election Data - Votes,	ELECTION_VOTES	Workforce Monitoring, Meet Regulatory Rqmts FRA, Election Monitoring, Maintain Election Data, Votes	Enter the voting results.
Maintain Election Data - Results	ELECTION_RESULTS	Workforce Monitoring, Meet Regulatory Rqmts FRA, Election Monitoring, Maintain Election Data, Results	View the results for each roll in a group and the calculation of the number of seats obtained for each roll. Modify the calculated results and validate the election results.
Maintain Election Data - Seats	ELECTION_SEATS	Workforce Monitoring, Meet Regulatory Rqmts FRA, Election Monitoring, Maintain Election Data, Seats	Determine which candidates are declared elected for each roll. Generally, the candidate display-order entered on this page is more important than the actual number of votes each candidate received.
Runctl Ele001	RUNCTL_ELE001	Workforce Monitoring, Meet Regulatory Rqmts FRA, Election Monitoring, Election Report, Runctl Ele001	Run the Election report, which provides the results of the staff representative elections for employees and management.

Defining an Election

Access the Maintain Election Data - Group page.

Group		Roll		Votes		Results		Seats	
Company:		KF1 Business I		Description:		KF001 Paris - Headquarter			
Election Date:		07/25/2000		Round:		1		Mandate Type: CE Wk Council	
Reserved for Monitor French Elections									
				Find View All		First 1-3 of 3 Last			
*Group				Voters		Incumbent		Substitute + -	
KFCAD	Managers			25		2		2	
KFETA	ETAM			75		3		3	
KFWRK	Workers			225		4		4	

Maintain Election Data - Group page

- Group** Select the groups that are present from the list of prompt values. To enter more than one group, insert additional data rows.
- Voters** Enter the number of employee voters registered for this group.
- Incumbent and Substitute** Enter the number of incumbents and substitutes affected by the election. The incumbent number is copied into the Substitute field, but you can overwrite this value.

Recording Candidacies for Election Groups

Access the Maintain Election Data - Roll page.

Group Roll Votes Results Seats

Company: KF1 Business I **Description:** KF001 Paris - Headquarter

Election Date: 07/25/2000 **Round:** 1 **Mandate Type:** CE Wk Council

Reserved for Monitor French Elections Find View All First 1 of 3 Last

Group: KFCAD Managers

Reserved for Monitor French Elections Find View All First 1 of 1 Last

***Roll** **Number of Candidates**

KF001 Confed. Francaise du Travail 2

Maintain Election Data - Roll page

Roll Enter rolls for each group by selecting them from the list of prompt values. To enter more than one roll for a group, insert additional rows.

Number of Candidates Displays the number of candidates. By default, this number corresponds to the numbers of incumbents to be elected in the group. You can override this value.

Note. If you change the number of candidates at the roll level on the Roll page, the system inserts or deletes rows on the Votes page. The number of Candidate rows on the Votes page is synchronized with the number of candidates that is defined at the roll level on the Roll page.

Entering Voting Results

Access Maintain Election Data - Votes page.

Group	Roll	Votes	Results	Seats
Company: KF1 Business I		Description: KF001 Paris - Headquarter		
Election Date: 07/25/2000		Round: 1	Mandate Type: CE Wk Council	
Reserved for Monitor French Elections Find View All First 1 of 3 Last				
Group: KFCAD	Invalid: 2	Blank: 3	Altered: 1	Regular: 19
Reserved for Monitor French Elections Find View All First 1 of 1 Last				
Roll: KF001	Inc.: 9.50	Sub.: 9.50	Altered: 1	Regular: 19
Reserved for Monitor French Elections Find View All First 1-2 of 2 Last				
Candidate	Incumbent Votes	Substitute Votes		
1	12	12		
2	7	7		

Maintain Election Data - Votes page

This page shows three levels of the Reserved for Monitor French Elections group box.

- Group** For the election in question, enter the number of Invalid, Blank, Altered, and Regular votes for each group.
- Roll** Displays the roll as you entered it on the Roll page and the average number of Inc. (incumbent) and Sub. (substitute) votes.
- Enter the number of altered votes and the number of regular votes for each roll.
- Candidate** If you enter the number of incumbent votes and substitute votes at the candidate level, the system displays the average number of votes for the incumbents and substitutes at the roll level.
- If you enter no votes at the candidate level, the number of regular votes entered at the roll level appears by default as 0 in both the Incumbent Votes and Substitute Votes fields at the candidate level.

Validating Election Results

Access the Maintain Election Data - Results page.

Group	Roll	Votes	Results	Seats
Company: KF1 Business I		Description: KF001 Paris - Headquarter		
Election Date: 07/25/2000		Round: 1 Mandate Type: CE Wk Council		
Reserved for Monitor French Elections Find View All First 1 of 3 Last				
Group: KFCAD	Invalid: 2	Blank: 3	Altered: 1	Regular: 19
Turnout: 96.0	Quorum ☒	Seat Value: 9.50	Election Validated ☐	
Reserved for Monitor French Elections Find View All First 1 of 1 Last				
	Incumbent: 2	Total: 1	Substitute: 2	Total: 1
Roll	Votes	Seats	Indicator	Result
KF001	9.50	1	4.75	1

Maintain Election Data - Results page

Group	For the election in question and for each group, displays a summary of Invalid, Blank, Altered, and Regular votes.
Turnout	Displays the turnout for the roll, which is a ratio calculated by adding the invalid, blank, and regular votes at the group level and dividing this number by the number of voters defined on the Group page.
Quorum	Selected by default if voter turnout for the group is greater than 50 percent. That is, the number of votes for a group (invalid, blank, and regular) is greater than the number of voters defined on the Group page divided by two.
Seat Value	Displays the seat value (electoral quotient), which is calculated at the group level by dividing the number of regular votes by the number of incumbents defined on the Group page. The seat value must be the same for all rolls in a group.
Election Validated	Select to validate the election.
Roll	Displays the number of incumbent votes and substitute votes entered on the Votes page at the roll level for a particular group.
Seats	Displays the number of seats to be allocated for the roll. This number is equal to the number of incumbent and substitute votes at the roll level divided by the seat value.
Indicator	Displays the number that is calculated by dividing the number of incumbent and substitute votes by the number in the Incumbent Results field and the Substitute Results field plus one.
Result	By default, displays the results from the calculation of the seats. You can change the results.

Determining Elected Candidates

Access the Maintain Election Data - Seats page.

Reserved for Monitor French Elections					
Group:		Turnout:	Quorum	Seat Value:	
KFCAD		96.0	☒	9.50	
Reserved for Monitor French Elections					
Roll:		Incumbent:	Substitute:	10% Rule	
KF001		1	1	☐	
Reserved for Monitor French Elections					
Candidate	Final Order	Elected:	Final Order	Elected:	
1	1	☒	1	☒	
2	2	☐	2	☐	

Maintain Election Data - Seats page

Group	Displays a summary from the Results page for each group, indicating the turnout and seat value and whether a quorum was reached.
Roll	Displays the number of incumbent and substitute seats obtained for each roll. This is the value entered in the Results field on the Results page.
10% Rule (10 percent rule)	For each roll, select to indicate whether the decision to declare the candidates elected is made by applying the 10 percent rule.
Candidate	Displays the candidate number. For each incumbent or substitute candidate, indicate the final order on the roll and whether the candidate was elected.

Preparing and Running the Employee Survey Report

This section provides an overview of the French Employee Survey Reporting Requirements and discusses how to:

- Set up the Compute Employee Survey process.
- Review calculation results.
- Viewing predefined employee survey indicators for the Employee Survey report.

Understanding French Employee Survey Reporting Requirements

The Employee Survey report (*le Bilan Social*) is an annual regulatory report that the French government requires from employers with more than 200 employees. The report is communicated to both labor unions and the government and provides an analysis of the company over the past three years for about 100 indicators.

There are three types of employee surveys for the three main types of industries. PeopleSoft delivers the most common type of employee survey—the one for the trade and services industry.

Indicators in that report include:

- The number of employees in the organization.
- The number of hires with an unlimited contract during a given year.
- The number of work accidents.

These indicators fall within seven groups set up by the French government: Employment, Compensation, Health and Safety, Work Conditions, Training, Professional Relations, and Others.

Here are the steps to prepare and run the Employee Survey report:

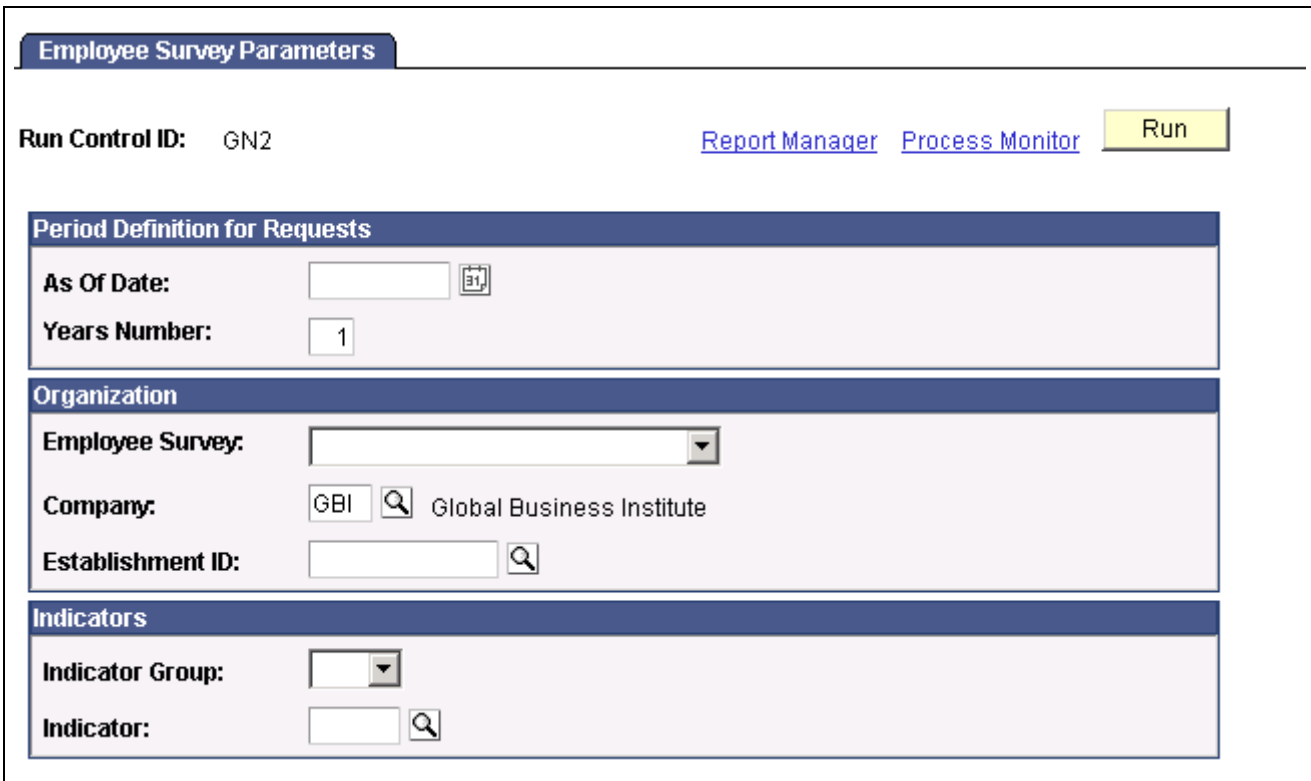
1. (Optional) Set up or modify the updating groups.
2. (Optional) Set up or modify the Employee Survey Indicators and link them with the application engines.
3. Run the Employee Survey process (HR_EMSURVEY) calculation for all indicators.
4. (Optional) Review the results of the process calculations.
5. Run the Employee Survey report to print the results of the process calculations, or export the data to a file.

Pages Used to Prepare and Run the Employee Survey Report

Page Name	Object Name	Navigation	Usage
Employee Survey Parameters	RUNCTL_EMSURVEY	Workforce Monitoring, Meet Regulatory Rqmts FRA, Employee Survey, Compute Employee Survey, Employee Survey Parameters	Set up the Compute Employee Survey process.
Edit Employee Survey	EDIT_SHEET_FRA	Workforce Monitoring, Meet Regulatory Rqmts FRA, Employee Survey, Edit Employee Survey	Review, and modify if needed, the calculation results run by the Compute Employee Survey process on each of the indicators.
Employee Survey Report	RUNCTL_SOC001	Workforce Monitoring, Meet Regulatory Rqmts FRA, Employee Survey, Employee Survey Report	Run the Employee Survey report (SOC001). This report gives an annual snapshot of a company based on the calculation of several indicators, such as the number of employees in the organization and their average salary.

Setting Up the Compute Employee Survey Process

Access the Employee Survey Parameters page.



Employee Survey Parameters page

As of Date and Years Number

Enter the date for which you want to process the Employee Survey report. The report processes the calculation by civil years. For instance, to report on the year 2002, enter any date in 2002 and 1 in the Years Number field. To report on 2002, 2003 and 2004, enter any date in 2002 and 3 in the Years Number field. The maximum reporting period is three years.

Employee Survey

Select the type of survey to run.

Company

Select from the list of prompt values.

Establishment ID

Select from the list of prompt values. To run the calculation processes for all of the establishments in the company, leave this field blank.

Indicator Group and Indicator

To run one indicator, enter the indicator group and the indicator number. To run all of the indicators for an indicator group, specify the indicator group and leave the Indicator field blank. To run all of the calculation processes for the Employee Survey report, leave both the Indicator Group and Indicator fields blank.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Reviewing Calculation Results

Access the Edit Employee Survey page.

Edit Employee Survey

User ID: SAMPLE Type of Employee Survey: Trade & Services Establishment

Run Control ID: AD

As Of Date: 01/01/1999

Indicator Group: 1 Employment

*Indicator: 111 Total Workforce

Executive	Act Exec	Worker	Total
1.000	1.000	3.000	5.000

*Indicator: 112 Full Time Workforce

Executive	Act Exec	Worker	Total
1.000	0.000	1.000	2.000

Edit Employee Survey page

Type of Employee Survey Displays the survey type.

As Of Date Displays the date that you ran the Compute Employee Survey process. Use the outer scroll bar to navigate between processes that are run with different as of dates.

Indicator Group and Indicator Displays the indicator and group. For each As Of Date process batch, you can review the results for each indicator group and each indicator for which you have run the Compute Employee Survey process. Use the middle scroll arrow to navigate between indicator groups and the inner scroll arrow to navigate between indicators. For each indicator, you can modify the data calculated by the process.

Viewing Predefined Employee Survey Indicators for the Employee Survey Report

Legally, the Employee Survey report can be administered by company or by establishment. The following table lists the delivered indicators for the establishment and company employee surveys using the trade and services model.

Indicator	Description	AE Section	Employee Survey	Long Description
111	Total Workforce	IND111	Establishment and Company	Total workforce as of December 31. Part-time workers are taken into account; non-employees are not retrieved.
112	Full Time Workforce	IND112	Establishment and Company	Full-time workers with an unlimited contract who were hired more than one year ago (as of December 31 of each year).
113	Limited Contract	IND113	Establishment and Company	All limited contractors are retrieved.
114	Workforce per Month	IND114	Establishment and Company	Monthly average headcount for a given year.
115A	Total Workforce: Male	IND115A	Establishment and Company	Distribution by gender of the total workforce as of December 31.
115B	Total Workforce: Female	IND115B	Establishment and Company	Distribution by gender of the total workforce as of December 31.
115C	Total Workforce: Unknown	IND115C	Establishment and Company	Distribution by gender of the total workforce as of December 31 when sex is unknown.
116A	< 25 Years Old	IND116A	Establishment and Company	Distribution by age of the total workforce as of December 31.

Indicator	Description	AE Section	Employee Survey	Long Description
116B	< 30 Years Old	IND116B	Establishment and Company	Distribution by age of the total workforce as of December 31.
116C	< 35 Years Old	IND116C	Establishment and Company	Distribution by age of the total workforce as of December 31.
116D	< 40 Years Old	IND116D	Establishment and Company	Distribution by age of the total workforce as of December 31.
116E	>= 40 Years Old	IND116E	Establishment and Company	Distribution by age of the total workforce as of December 31.
117A	< 1 Year of Service	IND117A	Establishment and Company	Distribution by company seniority date as of December 31.
117B	< 3 Years of Service	IND117B	Establishment and Company	Distribution by company seniority date as of December 31.
117C	< 5 Years of Service	IND117C	Establishment and Company	Distribution by company seniority date as of December 31.
117D	< 10 Years of Service	IND117D	Establishment and Company	Distribution by company seniority date as of December 31.
117E	>= 10 Years of Service	IND117E	Establishment and Company	Distribution by company seniority date as of December 31.

Indicator	Description	AE Section	Employee Survey	Long Description
118A	French Employees	IND118A	Establishment and Company	Total workforce by nationality as of December 31 (French).
118B	Foreigner Employees	IND118B	Establishment and Company	Total workforce by nationality as of December 31: other.
119	Workforce Distribution	IND119	Establishment and Company	Workforce distribution by employee categorization as of December 31.
121	External Workforce	IND121	Establishment and Company	Non-employee workers as of December 31.
122	Student	IND122	Establishment and Company	Internship as of December 31.
123	Temporary Workforce	IND123	Establishment and Company	Monthly average number of leased workers for a given year.
124	Limited Contract Duration	Not delivered	Establishment and Company	
131	Unlimited Contract Hire	IND131	Establishment and Company	Number of employees hired with an unlimited duration contract during the given year.
132	Limited Contract Recruitment	IND132	Establishment and Company	Number of employees recruited with a limited duration contract during a given year.

Indicator	Description	AE Section	Employee Survey	Long Description
133	Seasonal Contract Hire	IND133	Establishment and Company	Number of employees recruited with a seasonal contract during a given year.
134	Under 25 Years Old Hired	IND134	Establishment and Company	Number of hired employees who are less than 25 years old during a given year.
141	Total Departure	IND141	Establishment and Company	Number of permanent departures during a given year.
142	Resignation	IND142	Establishment and Company	Number of permanent departures due to resignations during a given year.
143	Discharge - Redundancy	IND143	Establishment and Company	Number of permanent departures due to redundancy during a given year.
144	Discharge - Other	IND144	Establishment and Company	Number of permanent departures due to other reasons during a given year.
145	End of Limited Contracts	IND145	Establishment and Company	Number of end of limited contract during a given year.
146	End While Qualification	IND146	Establishment and Company	Number of departures due to end while qualification during a given year.

Indicator	Description	AE Section	Employee Survey	Long Description
147	Move to another Establishment	IND147	Establishment	Number of moves to another establishment during a given year.
148	Retirement - Early Retirement	IND148	Establishment and Company	Number of departures due to retirement or early retirement during a given year.
149	Death	IND149	Establishment and Company	Number of deaths during a given year.
151	Promotion	IND151	Establishment and Company	Number of employees who changed employee categorization during a given year.
161	Employees Lay Off	IND161	Establishment and Company	Number of employees having at least one lay off during a given year.
162A	Employees Lay Off With Pay	IND162A	Establishment and Company	Number of employee layoff pay hours during a given year.
162B	Employee Lay Off Without Pay	IND162B	Establishment and Company	Number of employee layoff hours without pay during a given year.
171	Disability	IND171	Establishment and Company	Number of disabled workers as of March 31.
172	Disability Due to Work Accidents	IND172	Establishment and Company	Number of disabled workers due to a work accident in the present company as of March 31.

Indicator	Description	AE Section	Employee Survey	Long Description
181A	Leave of Absence	IND181A	Establishment and Company	Number of leaves of absence during a given year— public holidays and annual holidays excluded.
181B	Theoretical Worked Days	Not delivered	Establishment	
181C	Leave of Absence Rate	Not delivered	Establishment	
182	Leave of Absence - Sick	IND182	Establishment and Company	Number of leave of absence days due to sickness during a given year.
183A	Leave of Absence - Sick : < 8 Days	IND183A	Establishment and Company	Number of leave of absence days due to sickness that started during a given year—distribution by duration.
183B	Leave of Absence - Sick : < 30 Days	IND183B	Establishment and Company	Number of leave of absence days due to sickness that started during a given year—distribution by duration.
183C	Leave of Absence - Sick : >= 30 Days	IND183C	Establishment and Company	Number of leave of absence days due to sickness that started during a given year—distribution by duration.
184	Leave of Absence - Accident	IND184	Establishment and Company	Number of leave of absence days due to work accident, work illness, or accident when commuting during a given year.

Indicator	Description	AE Section	Employee Survey	Long Description
185	Leave of Absence - Maternity	IND185	Establishment and Company	Number of leave of absence days due to maternity during a given year.
186	Leave of Absence - Vacation	IND186	Establishment and Company	Number of authorized leave of absence days for vacation during a given year.
187	Leave of Absence - Other	IND187	Establishment and Company	Number of unauthorized leaves of absence during a given year.
211	Annual Salary by Empl	Not delivered	Establishment and Company	
211BI	Monthly Salary	Not delivered	Establishment and Company	
212	Average Salary as of December	Not delivered	Establishment and Company	
212BI	% of non monthly bonuses	Not delivered		
213A	Salary Scale: Male	Not delivered	Establishment and Company	
213B	Salary Scale: Female	Not delivered		
213C	Salary Scale: Total	Not delivered		
221	Salary Ratio: Higher/Lower	Not delivered	Establishment and Company	
221BI	Salary Ratio: Executive/Worker	Not delivered	Establishment and Company	

Indicator	Description	AE Section	Employee Survey	Long Description
222	Highest Compensation	Not delivered	Establishment	
231	Performance-Related	Not delivered	Establishment and Company	
232	Hourly Wage Percentage	Not delivered	Establishment and Company	
241A	Disease Grace Period	Not delivered	Establishment and Company	
241B	Disease Compensation	Not delivered	Establishment and Company	
241C	Public Holiday Compensation	Not delivered	Establishment and Company	
241D	Redundancy: Notice and Payment	Not delivered	Establishment and Company	
242	Expense for External	Not delivered	Establishment and Company	
251	Total Compensation	Not delivered	Establishment	
261	Bonus	Not delivered	Establishment	
262	Average Bonus	Not delivered	Establishment	
263	Stock Percent	Not delivered	Establishment	
311A	Work Accident	IND311A	Establishment and Company	Number of work accidents that result in leave of absence days during a given year.
311B	Theoretical Worked Hours	Not delivered	Establishment	

Indicator	Description	AE Section	Employee Survey	Long Description
311C	Work Accident Frequency	Not delivered	Establishment	
312A	Lost Days	IND312A	Establishment and Company	Lost days due to work accidents during a given year.
312B	Theoretical Worked Hours	Not delivered	Establishment	
312C	Accident Severity Rate	Not delivered	Establishment	The work accident severity equals the lost days due to work accidents times 10^6 divided by the theoretical worked hours.
313	Permanent Disability	IND313	Company	Number of permanent disabilities that are notified to the company during a given year.
313A	Permanent Disability: French	IND313A	Establishment	Number of permanent disabilities that are notified to the company during a given year.
313B	Permanent Disability: Foreigners	IND313B	Establishment	Number of permanent disabilities that are notified to the company during a given year.
314A	Fatal Accident at Work	IND314A	Establishment and Company	Number of fatal accidents at work during a given year.

Indicator	Description	AE Section	Employee Survey	Long Description
314B	Fatal Accident: Commuting	IND314B	Establishment and Company	Number of fatal accidents during commuting during a given year.
315	Stop Work Due to Accident	IND315	Establishment and Company	Number of accidents resulting in a stoppage of work during a given year.
316	Accident - Temporary	IND316	Establishment and Company	Number of nonemployee accidents at work during a given year.
317	Social Security	Not delivered	Establishment	
321	Accident - High Risk	IND321	Establishment and Company	Number of accidents linked to existing high risk during a given year.
322	Accident - Due to a Fall	IND322	Establishment and Company	Number of accidents classified as <i>due to a fall</i> during a given year.
323	Accident - Caused by a Machine	IND323	Establishment and Company	Number of accidents classified as <i>caused by a machine</i> during a given year.
324	Road Accident	IND324	Establishment and Company	Number of accidents classified as <i>road accident</i> during a given year.
325	Accident - Caused by an Object	IND325	Establishment and Company	Number of accidents classified as <i>caused by an object</i> during a given year.

Indicator	Description	AE Section	Employee Survey	Long Description
326	Accident - Others	IND326	Establishment and Company	Number of accidents classified as <i>other</i> during a given year.
331	Occupational Disease	Not delivered	Establishment and Company	
332	Disease Due to Work	Not delivered	Establishment and Company	
333	Jobs Can Cause Diseases	Not delivered	Establishment and Company	
341	Number of Security Meetings	Not delivered	Establishment and Company	
351	Security Training	Not delivered	Establishment and Company	
352	Security Budget	Not delivered	Establishment and Company	
353	Percentage Done	Not delivered	Establishment	
411	Weekly Hours	Not delivered	Establishment and Company	
412	Time Off in Lieu	IND412	Establishment and Company	Number of employees with time off instead of a benefit.
412A	Time Off in Lieu: Legal	IND412A	Establishment and Company	Number of employees who received legal time off during the given year.

Indicator	Description	AE Section	Employee Survey	Long Description
412B	Time Off in Lieu: Conventional	IND412B	Establishment and Company	Number of employees who received conventional time off during the given year.
413	Flextime	IND413	Establishment and Company	Number of employees with flextime as of December 31.
414A	Part-time: 20 -30 hrs a Week	IND414A	Establishment and Company	Number of employees working between 20 and 30 hours a week as of December 31.
414B	Part-time: Others	IND414B	Establishment and Company	Number of employees working part-time other than 20 to 30 hours a week as of December 31.
415	2 Days Time Off	Not delivered	Establishment and Company	
416	Annual Holidays - Average	IND416	Establishment and Company	Average number of annual holidays during the given year (time off in lieu not included).
417	Public Holidays Paid	Not delivered	Establishment and Company	
421	Alternate Hours	IND421	Establishment and Company	Number of employees with alternate hours as of December 31.
431	Noise >= 85 Db	Not delivered	Establishment and Company	

Indicator	Description	AE Section	Employee Survey	Long Description
432	Toxic Products Analyses	Not delivered	Establishment and Company	
441	Working Environment Improvement	Not delivered	Establishment and Company	
451	Improvement Program Expenses	Not delivered	Establishment and Company	
452	Percentage Done	Not delivered	Establishment	
461	Medical Exam	IND461	Establishment	Number of medical exam as of December 31.
461A	Medical Exam: Supervised Work	Not delivered	Establishment	
461B	Medical Exam: Others	Not delivered	Establishment	
462	Additional Medical Exam	IND462	Establishment	Number of additional medical exams given during the year.
462A	Additional Medical Exam: Supervised	Not delivered	Establishment	
462B	Additional Medical Exam: Others	Not delivered	Establishment	
463	Medical Intervention	Not delivered	Establishment	
471	Employees Unfit for Work	IND471	Establishment	Number of employees declared unfit for work by the work doctor during a given year.

Indicator	Description	AE Section	Employee Survey	Long Description
472	Employees Regraded	IND472	Establishment	Number of regraded employees due to an incapacity during a given year.
511	Training Total Payroll	Not delivered	Establishment and Company	
512	Training Budget	Not delivered	Establishment and Company	
513	Trainees	Not delivered	Establishment and Company	
514A	Trainees Hours Paid	Not delivered	Establishment and Company	
514B	Trainees Hours Unpaid	Not delivered	Establishment and Company	
515	Training Categories	Not delivered	Establishment and Company	
521	Training With Pay	IND521	Establishment and Company	Number of employees with a paid training leave during a given year.
522	Training Without Pay	IND522	Establishment and Company	Number of employees with an unpaid training leave during the given year.
523	Training Demand Reject	Not delivered	Establishment and Company	
531	Apprenticeship Contr	Not delivered	Establishment and Company	
611	Turnout at Elections	Not delivered	Establishment and Company	

Indicator	Description	AE Section	Employee Survey	Long Description
612	Time Allowed Used	Not delivered	Establishment and Company	
613	Union Representative Meetings	Not delivered	Establishment and Company	
614	Agreement	Not delivered	Company	
615	Leave of Working Education	Not delivered	Company	
621	Hours for Meetings	Not delivered	Establishment and Company	
622	Reception Procedure	Not delivered	Establishment and Company	
623	Information Procedure	Not delivered	Establishment and Company	
624	Individual Interview	Not delivered	Establishment and Company	
631	Non Judicial Action	Not delivered	Establishment and Company	
632	Judicial Inquiry	Not delivered	Establishment and Company	
633	Labor Inspector Notification	Not delivered	Establishment and Company	
711	Expense	Not delivered	Establishment and Company	
712	Payment to Works Council	Not delivered	Establishment and Company	

Indicator	Description	AE Section	Employee Survey	Long Description
721	Mutual Insurance: Health and Life	Not delivered	Company	
722	Mutual Insurance: Retirement	Not delivered	Company	

Running Workforce Reporting Statutory Reports

The section provides prerequisites for the single hiring statement and discusses how to:

- Run the Monthly Workforce report.
- Run the Workforce by Nationality report.
- Run the Personal Register report.
- Run the Single Hiring Statement report.
- Run the BIAF report.

Prerequisites for the Single Hiring Statement

The Single Hiring Statement retrieves information for new employees from your employee, company, and establishment tables. The following table lists the information that is required and the page where the information is entered for the employee.

Information	Page
Employee name Prefix	Workforce Administration, Personal Information, Biographical, Update Personal Information, Name History
Employee Address	Workforce Administration, Personal Information, Biographical, Update Personal Information, Address History
Gender	Workforce Administration, Personal Information, Biographical, Update Personal Information, Personal History

Information	Page
Social security number Date of Birth Nationality Previous Work Situation	Workforce Administration, Personal Information, Biographical, Update Personal Information, Identity/Diversity
Hire Date	Workforce Administration, Hire Employee, Job Information, Work Location
SIRET number APE Code Establishment address Establishment phone and fax number Establishment Activity Medical Organization Code and Address Company Name Company/establishment point of contact	Define the employee's company and establishment on the following page: Workforce Administration, Job Information, Job Data, Work Location The system retrieves the company and establishment details from the Company table and Establishment table.
Job Category Working Hours	Workforce Administration, Job Information, Job Data, Job Information The system retrieves job category information from the Job Code table.
Contract End Date	Workforce Administration, Job Information, Contract Administration, Update Contracts, Contract Status/Content
Contract Type	Workforce Administration, Job Information, Contract Administration, Update Contracts, Contract Type/Clauses
Probation Date	Workforce Administration, Job Information, Contract Administration, Update Contracts, Signature/Probation Info
Monthly Gross Salary	Workforce Administration, Job Information, Job Data, Compensation

Pages Used to Run the Workforce Reporting Statutory Reports

Page Name	Object Name	Navigation	Usage
Monthly Workforce Report	RUNCTL_REG001_FRA	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Monthly Workforce, Monthly Workforce Report	Run the Monthly Workforce report.
Workforce By Nationality	RUNCTL_REG003_FRA	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Workforce by Nationality	Run the Workforce by Nationality report.
Personal Register	RUNCTL_REG002_FRA	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Personal Register	Run the Personal Register report.
Single Hiring Statement	SHS_FRA_RUN_CTL	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, Single Hiring Statement	Use this page to run the Single Hiring Statement report, which is a statutory report that is filed at the time of hiring new employees. The system uses information from your employee, company, and establishment tables to generate the report.
BIAF Report (Bordereau Individuel d'Accès à la Formation report),	RUNCTL_BIAF_FRA	Workforce Monitoring, Meet Regulatory Rqmts FRA, Required Reports, BIAF, BIAF Report	Use this page to run the BIAF report.

Running the Monthly Workforce Report

Access the Monthly Workforce Report page.

This report lists the monthly personnel changes for a given establishment of a company. This report is required for all organizations that employ 50 or more employees.

Before running this report, define which contract types to include in the report using the Contract Type Group page.

Running the Workforce by Nationality Report

Access the Workforce by Nationality Report page.

This report provides a comprehensive analysis of the foreign workforce employed in a company.

Running the Personal Register Report

Access the Personal Register Report page.

This report lists employees for a given establishment of a company. Run the report for a specific establishment with an organization or for all establishments of an organization.

Running the Single Hiring Statement Report

Access the Single Hiring Statement page.

Single Hiring Statement page

You can automate the production of this report using workflow supplied by PeopleSoft. If you enable workflow, when an employee is hired, workflow adds an entry to the HR administrator's task list for the Single Hiring Statement.

Employee Selection Criteria

There are three ways to select the employees whom you want to include in the report. Depending on the method that you select, the system hides or displays fields.

By Hire Date

Select to generate the Single Hiring Statement report for all employees hired within a specified period. Enter the date range in the Employee Hired Between group box.

By Employee ID

Select to run the report for selected employee IDs. Use this option if you know the new employee IDs. Select the employees in the Employee List group box.

By Group

Select to generate the report for employees in a group. The system displays the Group ID field when you select this option.

Refresh

When you have defined the selection criteria, click this button to populate the Employee List group box with new employees who meet the criteria.

Clear

Click the button to clear the Employee List. The system removes all employees listed.

Employees Hired Between

This group box appears if you select By Hire Date only. Select the start and end dates for the report. The system searches for employees who were hired between these dates.

Start Date The default start date is the end date entered the last time that the Single Hiring Statement was run.

Employee List

When you click the Refresh button, the system populates this group box with new employees who meet the criteria that you selected. You can also add employees to the list.

For each employee listed, complete the Estimates Hire Time field and select the Exemption if First Hired and the Exemption if Part-Time check boxes, if necessary. This information is printed on the report.

Running the BIAF Report

Access the BIAF Report page.

The screenshot shows the BIAF Report page with the following fields and controls:

- Run Control ID:** 1
- Contract Type:** Fixed Term Adaption Contract (dropdown menu)
- From Date:** 03/14/2001 (calendar icon)
- Thru Date:** 11/06/2002 (calendar icon)
- Group ID:** H0GRP2 (search icon) H0GRP2 for Reports
- Buttons:** Report Manager, Process Monitor, Run
- List of Employee(s):**

*EmpID	Name
1 B-BARET109	Term,Future4

BIAF Report page

This report is for employees on fixed-term contracts and details the employee's training entitlement. French employers are required to contribute towards employee training through payments to official training organizations. The BIAF report includes information about the training organization that receives the employer's contributions and the terms and conditions of the training entitlement. You can print this report at any time during the employee's contract period.

You can run the BIAF report for:

- Individual employees, by adding employees to the List of Employee(s) group box.
- A group of employees, by selecting a group in the Group ID field.

Note. You must complete the From Date and Thru Date fields, whether you run the report for selected employees or for a group of employees.

Contract Type Select the type of fixed term contract from the following options: *Limited Contract*, *Fixed Term Adaptation Contract*, or *Fixed Term Emp. Init Contract*. The report includes only employees with the selected contract type. If you leave this field blank, the report includes employees with any of these contract types.

From Date and Thru Date	Select the hiring period for the report. The system searches for employees on fixed-term contracts whose hiring date is between the dates you specify.
Group ID	Select the group of employees to include in the report. The system searches the group for employees who meet the criteria defined in the Contract Type and From/Thru Date fields.
List of Employee(s)	To run the BIAF report for certain employees, add the employees to this group box.

See Also

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

Preparing and Running the Training 2483 Report

This section provides overviews of the Training 2483 reporting requirements, classification of Training 2483 report indicators, and calculation of report indicators and discusses how to prepare and run the Training 2483 report.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Training, “(FRA) Producing the French Training Report 2483”

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” (FRA) Meet Regulatory Requirements Reports for France

PeopleTools PeopleBook: PeopleSoft Application Engine

Understanding the Training 2483 Reporting Requirements

The Training 2483 (also called the Declaration 2483 report) is a French regulatory report that compiles information about the amount of money that a company has spent on employee vocational training. PeopleSoft delivers the definition of the legal groups and indicators with the system.

To prepare the Training 2483 report:

1. Review the information in the APE Table page.
This table classifies your company by industry or activity type, such as software, banking, or insurance.
2. Set up groups, indicators, and report parameters.
PeopleSoft delivers the definition of the 2483 groups and indicators. Use the 2483 Table - 2483 Group page to review the groups defined by the French government and the 2483 Table - 2483 Indicator page to review the indicators for each group.
3. Run the FRA Compute 2483 - Declaration 2483 page process (DEC2483) calculation for all of the indicators.
This process uses PeopleSoft Application Engine to gather the information that is needed to produce the Training 2483 report.
4. Review the results of the process calculations using the Edit 2483 page.

Because some indicators cannot be computed, use this page to manually enter information into the system.

5. Run Training 2483 report to print, or export to a file, the results of the process calculations.

Understanding Classification of Training 2483 Report Indicators

This section contains information about the indicators that PeopleSoft provides for the Training 2483 report, and it discusses how these indicators are used. The indicators are classified by group and designated by letters *B* through *M*. Each letter represents a particular description. For example, *B* represents general information while *C* represents costs summary. Indicators are either delivered by application process (calculated) or manually compiled.

List of PeopleSoft Indicators Classified by Group

The following table lists the indicators by group:

Group ID	Indicator ID	Indicator Description	Comments	Delivery
B	1	General Information		Calculated
B	2	Number of Male Employees		Calculated
B	3	Number of Female Employees		Calculated
B	4	Male + Female		Calculated
B	8	Number of Apprentices		Calculated
B	9	Back to Work Contracts		Calculated
B	10	Number of Qualification Contracts		Calculated
B	11	Number of Establishments		Calculated
C	1	Internal Training Cost		Calculated
C	2	Equipment Cost		Calculated

Group ID	Indicator ID	Indicator Description	Comments	Delivery
C	3	Number of Competency Checks		Calculated
C	4	Salary Costs		Calculated
C	5	Transportation Costs		Calculated
C	6	Training Consulting		Manually entered
C	7	Vocational Training Development		Manually entered
C	8	Training Warranty Payment		Manually entered
C	9	Training Time Capital		Manually entered
C	10	Payment to a Registered Body for Training Leave		Manually entered
C	11	Payments for Sandwich Courses		Manually entered
C	12	Other Payments		Manually entered
C	13	Total		Calculated
C	14	Subsidy		Manually entered
C	15	Chargeable Cost		Calculated
E	1,2,3	Expenditure Surplus		Manually entered

Group ID	Indicator ID	Indicator Description	Comments	Delivery
F	1	Total Annual Salaries	May be retrieved from DADS1 reporting if PeopleSoft Global Payroll is installed.	Manually entered
F	2	Total Contribution = Indicator 1 * 1, 5 or 2	Depends on whether or not the company is a temporary employment agency.	Calculated
F	3	Reduced Total Contribution		Calculated
F	4	Total Expenditures	= Indicator C-15	Calculated
F	5	Surplus of Expenditures	Indicator 4 – (Indicator 2 or Indicator 3)	Calculated
F	6	Lack of Expenditures	(Indicator 2 or Indicator 3) – Indicator 4	Calculated
F	7	Expenditure Surplus From the Three Previous Years	E1 + E2 + E3	Calculated
F	8	Difference Between the Lack of Expenditures and the Expenditure Surplus of the Three Previous Years.	Indicator 6 – Indicator 7 if > 0. If not, set this indicator to 0.	Calculated
G	9	Total Contribution = Indicator 1 * 0,4 or 0, 3%.	The percentage depends on whether or not the company is liable for the earning year's taxed <i>apprentissage</i> .	Calculated
G	10	Reduced Total Contribution		Calculated

Group ID	Indicator ID	Indicator Description	Comments	Delivery
G	11	Payment to a Registered Body on Sandwich Training Courses		Manually entered
G	12	Fix Sum Payments Directly Contributed by the Employer		Manually entered
G	13	Potential Lack of Expenditures	$(G9 + G10) - (G11 + G12)$	Calculated
G	14	Total	$G11 + G12 + G13$	Calculated
H	15	Total Contribution = Indicator 1 * 0,2 or 0,3 %	Percentage depends whether or not the company hires only temporary workers.	Calculated
H	16	Reduced Total Contribution		Calculated
H	17	Payment to a Registered Body on Training Capital (Capital Temps Formation)		Manually entered
H	18	Payment to a Registered Body on Individual Training Leave (CIF)		Manually entered
H	19	Potential Lack of Expenditures	$(G15 + G16) - (G17 + G18)$	Calculated
J	20	Total Salaries for Limited Contract Employees		Calculated
J	21	Total Contribution = Indicator K20 * 1%		Calculated

Group ID	Indicator ID	Indicator Description	Comments	Delivery
J	22	Payment to a Registered Body on Individual Training Leave (CIF) for Limited Contract Employees		Manually entered
J	23	Potential Lack of Expenditures		Calculated
K	24	Lack of Expenditures	= F8	Calculated
K	25	Regularization Payment		Manually entered
K	26	Regularization Payment for not Consulting the Company Work Council	The amount of the regularization payment is (F2 or F3)/2.	Manually entered
K	27	Lack of Expenditures on Individual Training (CIF)	= H19	Calculated
K	28	Lack of Expenditures on Individual Training (CIF) for Limited Contract Employees	= J23	Calculated
K	29	Lack of Expenditures on Training Capital for Limited Contract Employees	= G13	Calculated
K	30	Contributions to the Government in French Francs	K24 + K25+ K26 + K27 +K28+ K29	Calculated

Group ID	Indicator ID	Indicator Description	Comments	Delivery
K	31	Contributions to the Government in Euros	K30 converted in euros	Calculated
L	2	Number of Male Students Paid by the Company		Calculated
L	3	Number of Female Students Paid by the Company		Calculated
L	4	Total Number of Students Paid by the Company		Calculated
L	5	Students Paid Totally or Partially by a Registered Body		Calculated
L	6	Total Number of Hours Paid by the Company		Calculated
L	7	Total Number of Hours Paid Totally or Partially by a Registered Body		Calculated
L	8	Total Number of Competency Checks		Calculated
L	9	Number of Students on Training Leave who are Entirely Paid by the Company		Calculated
L	10	Number of Students on Training Leave who are Totally or Partially Paid by a Registered Body		Calculated

Group ID	Indicator ID	Indicator Description	Comments	Delivery
L	11	Number of Competency Checks Paid by a Registered Body		Calculated
L	12	Number of Training Hours Paid by the Company		Calculated
L	13	Number of Qualification Contracts		Calculated
L	14	Number of Training Hours Paid by the Company for Qualification Contracts		Calculated
M	1	Distribution of Male Students		Calculated
M	2	Distribution of Female Students		Calculated

Understanding Calculation of the Report Indicators

This section is for implementers of the Training 2483 report. Some indicators are calculated based on the data existing in the Administer Training business process in PeopleSoft Human Resources. Others are calculated based on parameters that you input into the system through the Trn 2483 Parameters Setup (Training 2483 parameters setup) page.

The Training 2483 report is complex. For some indicators, several conditions must be fulfilled for the indicators to be correctly calculated.

This section lists records and fields to be completed in order to retrieve values for the indicators that are calculated based on data tracked in the Administer Training business process. These fields are used in SQL joins. Note that the order of the fields displayed in these tables doesn't necessarily match the order of the keys in the related records.

Calculation of Group B Indicators

To calculate group B indicators:

- Set up an employee contract on the Contract Type Table Setup page and link the employee to a collective agreement on the Job Data - Job Labor page.

- Set the employee status to *Active*, *Leave of Absence*, or *Leave With Pay*.
- Set up the 2483 Professional Category field as *CAD*, *OQU*, *EMP*, *AGM* or *ONQ* on the Employee Categorization page.

PS_JOB A	PS_PERSONAL_ DATA B	PS_EMPL_CTG_L1 C	PS_CONTRACT_ DATA D
A.EMPLID	B.EMPLID	C.CATEGORY_2483_ FRA	D.EMPLID
A.EMPL_RCD	B.SEX	C.EMPL_CTG	D.CONTRACT_NUM
A.EFFDT		C.LABOR_ AGREEMENT	
A.EFFSEQ			
A.EMPL_STATUS			
A.EMPL_CTG			
A.LABOR_ AGREEMENT			

Calculation of Indicator C1 - Internal Training Cost: Instructor Expenses

To calculate indicator C1 - Internal Training Cost: Instructor Expenses:

- Set up the employee status as *Active*, *Leave of Absence*, or *Leave With Pay*.
- Terminate the training session in which the employees were enrolled.
- Organize the training session by the company (SESSN_ORGANIZER = Y).

PS_JOB A	PS_TRN_EEINST_COST B	PS_CRSE_SESSN_TBL C
A.EMPLID	B.CHARGEABLE_CST_FRA	C.COURSE
A.EMPL_RCD	B.COURSE	C.COURSE_END_DT
A.EFFDT	B.CURRENCY_CD	C.COURSE_START_DT
A.EFFSEQ	B.EMPLID	C.SESSION_NBR

PS_JOB A	PS_TRN_EEINST_COST B	PS_CRSE_SESSN_TBL C
A.EMPL_STATUS	B.SESSION_NBR	C.SESSION_STATUS
		C.SESSION_ORGANIZER

Calculation of Indicator C1 - Internal Training Cost: Non-instructor Personnel Expenses

To calculate indicator C1 - Internal Training Cost: Non-instructor Personnel Expenses:

- Set up the employee status to *Active*, *Leave of Absence*, or *Leave With Pay*.
- Terminate the training session in which the employees were enrolled.
- Organize the training session by the company (SESSN_ORGANIZER = Y).
- Set the tuition expense type for 2483 as *NIN* on the Tuition Expense Type Table page.

PS_JOB A	PS_TRN_SSEXPN_COST B	PS_CRSE_SESSN_TBL C	PS_TUIT_EXPEN_TBL D
A.EMPLID	B.CHARGEABLE_CST_FRA	C.COURSE	D.EFFDT
A.EMPL_RCD	B.COURSE	C.COURSE_END_DT	D.TUIT_EXPENSE_TYPE
A.EFFDT	B.CURRENCY_CD	C.COURSE_START_DT	D.TYPE_2483_FRA
A.EFFSEQ	B.EMPLID	C.SESSION_NBR	
A.EMPL_STATUS	B.EXPENSE_TYPE	C.SESSION_STATUS	
	B.SESSION_NBR	C.SESSION_ORGANIZER	

Indicator C1 is the sum of the instructor expenses, non-instructor personnel expenses, and furniture expenses.

Note. Record TRN_EEEXPN_COST is updated manually in the Track Student Costs component.

Calculation of Indicator C2 - Internal Training Cost: Furniture Expenses

To calculate indicator C2 - Internal Training Cost: Furniture Expenses:

- Set up the employee status to *Active*, *Leave of Absence*, or *Leave With Pay*.
- Terminate the training session in which the employees were enrolled.
- Organize the training session by the company (SESSN_ORGANIZER = Y).

- Set the tuition expense type for 2483 as *NIN* on the Tuition Expense Type Table page.

PS_JOB A	PS_TRN_EEEXPN_ COST B	PS_CRSE_SESSN_ TBL C	PS_TUIT_EXPEN_ TBL D
A.EMPLID	B.CHARGEABLE_CST_ FRA	C.COURSE	D.EFFDT
A.EMPL_RCD	B.COURSE	C.COURSE_END_DT	D.TUIT_EXPENSE_ TYPE
A.EFFDT	B.CURRENCY_CD	C.COURSE_START_DT	D.TYPE_2483_FRA
A.EFFSEQ	B.EMPLID	C.SESSION_NBR	
A.EMPL_STATUS	B.EXPENSE_TYPE	C.SESSION_STATUS	
	B.SESSION_NBR	C.SESSN_ORGANIZER	

This indicator is calculated as part of indicator C1.

Calculation of Indicator C3 - Competency Checks

To calculate indicator C3 - Competency Checks:

- Set up the employee status to *Active*, *Leave of Absence*, or *Leave With Pay*.
- Terminate the training session in which the employees were enrolled.
- Set the course type to *Competency Check* in the Course Table Report.
- Ensure that the vendor is chargeable, certified, billed and the date of the bill is filled. Set these values in the Course Session Cost - Vendor page.

PS_JOB A	PS_TRN_EEPROV_ COST B	PS_COURSE_TBL C	PS_CRSE_SESSN_ TBL D
A.EMPLID	B.CHARGEABLE_CST_ FRA	C.COURSE	D.COURSE
A.EMPL_RCD	B.COURSE	C.COURSE_TYPE	D.COURSE_END_DT
A.EFFDT	B.COURSE		D.COURSE_START_DT
A.EFFSEQ	B.CURRENCY_CD		D.SESSION_NBR

PS_JOB A	PS_TRN_EEPROV_ COST B	PS_COURSE_TBL C	PS_CRSE_SESSN_ TBL D
A.EMPL_STATUS	B.EMPLID		D.SESSION_STATUS
	B.SESSION_NBR		

Calculation of Indicator C4 - Salary Costs for Regular Courses and Competency Checks

To calculate indicator C4 - Salary Costs for Regular Courses and Competency Checks:

- Set up the employee status to *Active*, *Leave of Absence*, or *Leave With Pay*.
- Terminate the training session in which the employees were enrolled.

PS_JOB A	PS_TRN_EESAL_COST B	PS_CRSE_SESSN_TBL C
A.EMPLID	B.CHARGEABLE_CST_FRA	C.COURSE
A.EMPL_RCD	B.COURSE	C.COURSE_END_DT
A.EFFDT	B.CURRENCY_CD	C.COURSE_START_DT
A.EFFSEQ	B.EMPLID	C.SESSION_NBR
A.EMPL_STATUS	B.SESSION_NBR	C.SESSION_STATUS

Calculation of Indicator C5 - Transportation and Lodging Costs

To calculate indicator C5 - Transportation and Lodging Costs:

- Set up the employee status to *Active*, *Leave of Absence*, or *Leave With Pay*.
- Terminate the training session in which the employees were enrolled.
- Organize the training session by the company (SESSN_ORGANIZER = Y).
- Set the tuition expense type for 2483 as *LAT* on the Tuition Expense Type Table page.

PS_JOB A	PS_TRN_SSEXPN_ COST B	PS_CRSE_SESSN_ TBL C	PS_TUIT_EXPEN_TBL D
A.EMPLID	B.CHARGEABLE_CST_FRA	C.COURSE	D.EFFDT
A.EMPL_RCD	B.COURSE	C.COURSE_END_DT	D.TUIT_EXPENSE_TYPE

PS_JOB A	PS_TRN_SSEXPN_ COST B	PS_CRSE_SESSN_ TBL C	PS_TUIT_EXPEN_TBL D
A.EFFDT	B.CURRENCY_CD	C.COURSE_START_DT	D.TYPE_2483_FRA
A.EFFSEQ	B.EMPLID	C.SESSION_NBR	
A.EMPL_STATUS	B.EXPENSE_TYPE	C.SESSION_STATUS	
	B.SESSION_NBR		

Calculation of Indicators L2, L3, and L4 – Male, Female, and Total Students Paid by the Company

To calculate indicators L2, L3, and L4 - Male, Female, and Total Students Paid by the Company:

- Set up the employee status to *Active*, *Leave of Absence*, or *Leave with Pay*.
- Ensure that employees are not on a training leave (TRAINING_LEAVE_FRA = N).
- Ensure that the course is not a sandwich course (PART_TIME_CRSE_FRA = N).

PS_JOB A	PS_TRAINING B	PS_TRN_EESAL_ COST C	PS_PERSONAL_ DATA D
A.EMPLID	B.COURSE	C.COURSE	D.EMPLID
A.EMPL_RCD	B.COURSE_END_DT	C.EMPLID	D.SEX
A.EFFDT	B.COURSE_START_DT	C.FINANCING_FUND_ FRA	
A.EFFSEQ	B.EMPLID	C.SESSION_NBR	
A.EMPL_STATUS	B.PART_TIME_CRSE_ FRA		
A.EMPL_CTG	B.SESSION_NBR		
A.LABOR_ AGREEMENT	B.TRAINING_LEAVE_ FRA		

PS_EMPL_CTG_L1 E	PS_TRN_EEEXPN_ COST G	PS_TRN_SSEXPN_ COST H	PS_TRN_EEPROV_ COST J
E.CATEGORY_2483_ FRA	G.COURSE	H.COURSE	J.COURSE
E.EMPL_CTG	G.EMPLID	H.EMPLID	J.EMPLID
E.LABOR_ AGREEMENT	G.FINANCING_FUND_ FRA	H.FINANCING_FUND_ FRA	J.FINANCING_FUND_ FRA
	G.SESSION_NBR	H.SESSION_NBR	J.SESSION_NBR

Calculation of Indicator L5 - Students Paid Partially or Totally By a Registered Body

To calculate indicator L5 - Students Paid Partially or Totally By a Registered Body:

- Set up the employee status to *Active*, *Leave of Absence*, or *Leave with Pay*.
- Ensure that employees are not on a training leave (TRAINING_LEAVE_FRA = N).
- Ensure that the course is not a sandwich course (PART_TIME_CRSE_FRA = N).

PS_JOB A	PS_TRAINING B	PS_TRN_EESAL_ COST C	PS_PERSONAL_ DATA D
A.EMPLID	B.COURSE	C.COURSE	D.EMPLID
A.EMPL_RCD	B.COURSE_END_DT	C.EMPLID	D.SEX
A.EFFDT	B.COURSE_START_DT	C.FINANCED_COST_ FRA	
A.EFFSEQ	B.EMPLID	C.FINANCING_FUND_ FRA	
A.EMPL_STATUS	B.PART_TIME_CRSE_ FRA	C.SESSION_NBR	
A.EMPL_CTG	B.SESSION_NBR		
A.LABOR_ AGREEMENT	B.TRAINING_LEAVE_ FRA		

PS_EMPL_CTG_L1 E	PS_TRN_EEEXP_N_ COST F	PS_TRN_SSEXPN_ COST G	PS_TRN_EEPROV_ COST J
E.CATEGORY_2483_FRA	F.COURSE	G.COURSE	J.COURSE
E.EMPL_CTG	F.EMPLID	G.EMPLID	J.EMPLID
E.LAB_AGREEMNT_ FRA	F.FINANCED_COST_ FRA	G.FINANCED_COST_ FRA	J.FINANCED_COST_ FRA
	F.FINANCING_FUND_ FRA	G.FINANCING_FUND_ FRA	J.FINANCING_FUND_ FRA
	F.SESSN_NBR	G.SESSN_NBR	J.SESSN_NBR

Calculation of Indicator L6 - Total of Hours Entirely Paid by the Company

To calculate indicator L6 - Total of Hours Entirely Paid by the Company:

- Set up the employee status to *Active*, *Leave of Absence*, or *Leave With Pay*.
- Ensure that employees are not on a training leave (TRAINING_LEAVE_FRA = N).
- Ensure that the course is not a sandwich course (PART_TIME_CRSE_FRA = N).
- Ensure that the trainees have the appropriate attendance status. If the value in the Attendance Status field is *C*, the system uses the total number of hours. If value in the Attendance Status field is *I*, the system extracts the total number of hours considered from the Time Spent at Training field on the Course Session Enrollment page.
- Complete the training session.

PS_JOB A	PS_TRAINING B	PS_TRN_EEEXP_N_ COST C	PS_PERSONAL_ DATA D
A.EFFDT	B.ATTENDANCE	C.COURSE	D.EMPLID
A.EFFSEQ	B.COURSE	C.EMPLID	D.SEX
A.EMPL_RCD	B.COURSE_END_DT	C.FINANCING_FUND_ FRA	
A.EMPL_STATUS	B.COURSE_START_DT	C.SESSN_NBR	
A.EMPLID	B.EMPLID		

PS_JOB A	PS_TRAINING B	PS_TRN_EEEXPN_ COST C	PS_PERSONAL_ DATA D
A.EMPL_CTG	B.PART_TIME_CRSE_ FRA		
A.LABOR_ AGREEMENT	B.SESSN_NBR		
	B.TRAINING_LEAVE_ FRA		

PS_EMPL_CTG_ L1 E	PS_TRN_ EESAL_COST G	PS_TRN_ SSEXP_N COST J	PS_TRN_ EEPROV_COST K	PS_CRSE_ SESSN_TBL L
E.CATEGORY_ 2483_FRA	G.COURSE	J.COURSE	K.COURSE	L.COURSE
E.EMPL_CTG	G.FINANCING_ FUND_FRA	J.FINANCING_ FUND_FRA	K.EMPLID	L.DURATION_ CONVERTED
E.LABOR_ AGREEMENT	G.SESSN_NBR	J.SESSN_NBR	K.FINANCING_ FUND_FRA	L.SESSN_NBR
			K.SESSN_NBR	L.SESSN_ STATUS

Calculation of Indicator L7 - Total Hours Paid by a Registered Body

To calculate indicator L7 - Total Hours Paid by a Registered Body:

- Set up the employee status to *Active*, *Leave of Absence*, or *Leave With Pay*.
- Ensure that employees are not on a training leave (TRAINING_LEAVE_FRA = N).
- Ensure that the course is not a sandwich course (PART_TIME_CRSE_FRA = N).
- Ensure that the trainees have the appropriate attendance status. If attendance status is *C*, the system uses the total number of hours. If attendance status is *I*, the system extracts the total number of hours considered from the Time Spent at Training field on the Course Session Enrollment page.
- Complete the training session.

PS_JOB A	PS_TRAINING B	PS_TRN_EEEXPN_ COST C	PS_PERSONAL_ DATA D
A.EFFDT	B.ATTENDANCE	C.COURSE	D.EMPLID
A.EFFSEQ	B.COURSE	C.EMPLID	D.SEX
A.EMPL_RCD	B.COURSE_END_DT	C.FINANCED_COST_ FRA	
	B.COURSE_START_DT	C.FINANCING_FUND_ FRA	
A.EMPL_STATUS	B.EMPLID	C.SESSN_NBR	
A.EMPLID	B.PART_TIME_CRSE_ FRA		
A.EMPL_CTG	B.SESSN_NBR		
A.LABOR_ AGREEMENT	B.TRAINING_LEAVE_ FRA		

PS_EMPL_CTG_ L1 E	PS_TRN_ EESAL_COST G	PS_TRN_ SSEXP_N_COST J	PS_TRN_ EEPROV_COST K	PS_CRSE_ SESSN_TBL L
E.CATEGORY_ 2483_FRA	G.COURSE	J.COURSE	K.COURSE	L.COURSE
E.EMPL_CTG	G.EMPLID	J.EMPLID	K.EMPLID	L.DURATION_ CONVERTED
E.LABOR_ AGREEMENT	G.FINANCED_ COST_FRA	J.FINANCED_ COST_FRA	K.FINANCED_ COST_FRA	L.SESSN_NBR
	G.FINANCING_ FUND_FRA	J.FINANCING_ FUND_FRA	K.FINANCING_ FUND_FRA	L.SESSN_ STATUS
	G.SESSN_NBR	J.SESSN_NBR	K.SESSN_NBR	

Calculation of Indicator L8 - Number of Competency Checks Paid by the Company

To calculate indicator L8 - Number of Competency Checks Paid by the Company:

- Set up the employee status to *Active*, *Leave of Absence*, or *Leave With Pay*.
- Ensure that employees are not on a training leave (TRAINING_LEAVE_FRA = N).
- Ensure that the course is not a sandwich course (PART_TIME_CRSE_FRA = N).
- Set up the course type as *Competency Check* in the Course Table Report component.

PS_JOB A	PS_TRAINING B	PS_TRN_EESAL_COST C	PS_PERSONAL_DATA D
A.EFFDT	B.COURSE	C.COURSE	D.EMPLID
A.EFFSEQ	B.COURSE_END_DT	C.EMPLID	D.SEX
A.EMPL_RCD	B.COURSE_START_DT	C.FINANCED_COST_FRA	
A.EMPL_STATUS	B.EMPLID	C.SESSION_NBR	
A.EMPLID	B.PART_TIME_CRSE_FRA		
A.EMPL_CTG	B.SESSION_NBR		
A.LABOR_AGREEMENT	B.TRAINING_LEAVE_FRA		

PS_EMPL_CTG_L1 E	PS_COURSE_TBL F	PS_TRN_EEEXP_COST G	PS_TRN_SSEXP_COST H	PS_TRN_EEPROV_COST K
E.CATEGORY_2483_FRA	F.COURSE	G.COURSE	H.COURSE	K.COURSE
E.EMPL_CTG	F.COURSE_TYPE	G.EMPLID	H.EMPLID	K.EMPLID
E.LABOR_AGREEMENT		G.FINANCED_COST_FRA	H.FINANCED_COST_FRA	K.FINANCED_COST_FRA
		G.SESSION_NBR	H.SESSION_NBR	K.SESSION_NBR

Calculation of Indicator L9 - Training Leaves Paid by the Company

To calculate indicator L9 - Training Leaves Paid by the Company:

- Set up the employee status to *Active*, *Leave of Absence*, or *Leave With Pay*.
- Ensure that employees are on a training leave (TRAINING_LEAVE_FRA = Y).
- Ensure that no financing fund is involved in the financing of this type of course (FINANCING_FUND_FRA = <blank>).

PS_JOB A	PS_TRAINING B	PS_TRN_EEEXPN_ COST C	PS_PERSONAL_ DATA D
A.EFFDT	B.COURSE	C.COURSE	D.EMPLID
A.EFFSEQ	B.COURSE_END_DT	C.EMPLID	D.SEX
A.EMPL_RCD	B.COURSE_START_DT	C.FINANCING_FUND_ FRA	
A.EMPL_STATUS	B.EMPLID	C.SESSN_NBR	
A.EMPLID	B.SESSN_NBR		
A.EMPL_CTG	B.TRAINING_LEAVE_ FRA		
A.LABOR_ AGREEMENT			

PS_EMPL_CTG_L1 E	PS_TRN_EESAL_ COST G	PS_TRN_SSEXPN_ COST J	PS_TRN_EEPROV_ COST K
E.CATEGORY_2483_ FRA	G.COURSE	J.COURSE	K.COURSE
E.EMPL_CTG	G.EMPLID	J.EMPLID	K.EMPLID
E.LABOR_ AGREEMENT	G.FINANCING_FUND_ FRA	J.FINANCING_FUND_ FRA	K.FINANCING_ FUND_FRA
	G.SESSN_NBR	J.SESSN_NBR	K.SESSN_NBR

Calculation of Indicator L10 - Training Leaves Paid by a Registered Body

To calculate indicator L10 - Training Leaves Paid by a Registered Body:

- Set up the employee status to *Active*, *Leave of Absence*, or *Leave With Pay*.

- Ensure that employees are on a training leave (TRAINING_LEAVE_FRA = Y).

PS_JOB A	PS_TRAINING B	PS_TRN_EEEXPN _ COST C	PS_PERSONAL _ DATA D
A.EFFDT	B.COURSE	C.COURSE	D.EMPLID
A.EFFSEQ	B.COURSE_END_DT	C.EMPLID	D.SEX
A.EMPL_RCD	B.COURSE_START_DT	C.FINANCED_COST_FRA	
A.EMPL_STATUS	B.EMPLID	C.FINANCING_FUND_FRA	
A.EMPLID	B.SESSN_NBR	C.SESSN_NBR	
A.EMPL_CTG	B.TRAINING_LEAVE_FRA		
A.LABOR_AGREEMENT			

PS_EMPL_CTB_L1 E	PS_TRN_EESAL _ COST G	PS_TRN_SSEXP _ COST J	PS_TRN_EEPROV _ COST K
E.CATEGORY_2483_FRA	G.COURSE	J.COURSE	K.COURSE
E.EMPL_CTG	G.EMPLID	J.EMPLID	K.EMPLID
E.LABOR_AGREEMENT	G.FINANCED_COST_FRA	J.FINANCED_COST_FRA	K.FINANCED_COST_FRA
	G.FINANCING_FUND_FRA	J.FINANCING_FUND_FRA	K.FINANCING_FUND_FRA
	G.SESSN_NBR	J.SESSN_NBR	K.SESSN_NBR

Calculation of Indicator L11 - Number of Competency Checks Financed by a Registered Body for Training Leave

To calculate indicator L11 - Number of Competency Checks Financed by a Registered Body for Training Leave:

- Set up the employee status to *Active*, *Leave of Absence*, or *Leave With Pay*.

- Ensure that employees are on a training leave (TRAINING_LEAVE_FRA = Y).
- Set the course type to *Competency Check* (COURSE_TYPE = O) in the Course Table Report component.

PS_JOB A	PS_TRAINING B	PS_TRN_EEEXPN_COST C	PS_PERSONAL_DATA D
A.EFFDT	B.COURSE	C.COURSE	D.EMPLID
A.EFFSEQ	B.COURSE_END_DT	C.EMPLID	D.SEX
A.EMPL_RCD	B.COURSE_START_DT	C.FINANCED_COST_FRA	
A.EMPL_STATUS	B.EMPLID	C.FINANCING_FUND_FRA	
A.EMPLID	B.SESSN_NBR	C.SESSN_NBR	
A.EMPL_CTG	B.TRAINING_LEAVE_FRA		
A.LABOR_AGREEMENT			

PS_EMPL_CTG_L1 E	PS_COURSE_TBL F	PS_TRN_EESAL_COST G	PS_TRN_SSEXP_N_COST J	PS_TRN_EEPROV_COST K
E.CATEGORY_2483_FRA	F.COURSE	G.COURSE	J.COURSE	K.COURSE
E.EMPL_CTG	F.COURSE_TYPE	G.EMPLID	J.EMPLID	K.EMPLID
E.LABOR_AGREEMENT		G.FINANCED_COST_FRA	J.FINANCED_COST_FRA	K.FINANCED_COST_FRA
		G.FINANCING_FUND_FRA	J.FINANCING_FUND_FRA	K.FINANCING_FUND_FRA
		G.SESSN_NBR	J.SESSN_NBR	K.SESSN_NBR

Calculation of Indicator L12 - Total of Hours Paid by the Company: Training Leaves and Competency Checks

To calculate indicator L12 - Total of Hours Paid by the Company: Training Leaves and Competency Checks:

- Set up the employee status to *Active*, *Leave of Absence*, or *Leave With Pay*.
- Ensure that employees are not on a training leave (TRAINING_LEAVE_FRA = N).
- Ensure that the course is not a sandwich course (PART_TIME_CRSE_FRA = N).
- Ensure that the trainees have the appropriate attendance status. If attendance status is *C*, the system uses the total number of hours. If attendance status is *I*, the system extracts the total number of hours considered from the Time Spent at Training field on the Course Session Enrollment page.
- Complete the training session.

PS_JOB A	PS_TRAINING B	PS_TRN_EEEXPN _COST C	PS_PERSONAL _ DATA D
A.EFFDT	B.ATTENDANCE	C.COURSE	D.EMPLID
A.EFFSEQ	B.COURSE	C.EMPLID	D.SEX
A.EMPL_RCD	B.COURSE_END_DT	C.SESSION_NBR	
	B.COURSE_START_DT		
A.EMPL_STATUS	B.EMPLID		
A.EMPLID	B.SESSION_NBR		
A.EMPL_CTG	B.TRAINING_LEAVE_ FRA		
A.LABOR_ AGREEMENT			

PS_EMPL_CTG_ L1 E	PS_TRN_EESAL _COST G	PS_TRN_ SSEXP_N _COST J	PS_TRN_ EEPROV _COST K	PS_CRSE_ SESSN_TBL
E.CATEGORY_ 2483_FRA	G.COURSE	J.COURSE	K.COURSE	L.COURSE
E.EMPL_CTG	G.EMPLID	J.EMPLID	K.EMPLID	L.DURATION_ CONVERTED

PS_EMPL_CTG_ L1 E	PS_TRN_EESAL _ COST G	PS_TRN_ SSEXPN _ COST J	PS_TRN_ EEPROV _ COST K	PS_CRSE_ SESSN_TBL
E.LABOR_ AGREEMENT	G.SESSION_NBR	J.SESSION_NBR	K.SESSION_NBR	L.SESSION_NBR
				L.SESSION_ STATUS

Calculation of Indicator L13 - Number of Qualification or Orientation Contracts

To calculate indicator L13 - Number of Qualification or Orientation Contracts:

- Set up an employee contract on the Contract Data - Contract Status/Content page, and link the employee to a collective agreement on the Job Data - Job Labor page.
- Set up the employee status to *Active*, *Leave of Absence*, or *Leave With Pay*.
- Ensure that the course is a sandwich course (PART_TIME_CRSE_FRA = Y).
- Set the contract type to *Qualification*, *Adaptation*, or *Orientation* (CONTRACT_TYPE = QUA, ADA or ORI).

PS_JOB A	PS_TRAINING B	PS_PERSONAL_ DATA D	PS_EMPL_CTG_ L1 E	PS_CONTRACT_ DATA F
A.EFFDT	B.COURSE_END_ DT	D.EMPLID	E.CATEGORY_ 2483_FRA	F.CONTRACT_ TYPE
A.EFFSEQ	B.COURSE_ START_DT	D.SEX	E.EMPL_CTG	F.EMPL_NUM
A.EMPL_RCD	B.EMPLID		E.LABOR_ AGREEMENT	F.EMPLID
A.EMPL_STATUS	B.PART_TIME_ CRSE_FRA			
A.EMPLID				
A.EMPL_CTG				
A.LABOR_ AGREEMENT				

Calculation of Indicator L14 - Total of Hours for Qualification, Adaptation, and Orientation Contracts

To calculate indicator L14 - Total of Hours for Qualification, Adaptation, and Orientation Contracts:

- Set up an employee contract on the Contract Data - Contract Status/Content page, and link the employee to a collective agreement on the Job Data - Job Labor page.
- Set up the employee status to *Active*, *Leave of Absence*, or *Leave With Pay*.
- Ensure that the course is a sandwich course (PART_TIME_CRSE_FRA = Y).
- Set the contract type to *Qualification*, *Adaptation*, or *Orientation* (CONTRACT_TYPE = QUA, ADA or ORI).
- Ensure that the trainees have the appropriate attendance status. If attendance status is *C*, the system uses the total number of hours. If attendance status is *I*, the system extracts the total number of hours considered from the Time Spent at Training field on the Course Session Enrollment page.
- Complete the training session.

PS_JOB A	PS_TRAINING B	PS_PERSONAL_DATA D	PS_EMPL_CTG_L1 E
A.EFFDT	B.ATTENDANCE	D.EMPLID	E.CATEGORY_2483_FRA
A.EFFSEQ	B.COURSE	D.SEX	E.EMPL_CTG
A.EMPL_RCD	B.COURSE_END_DT		E.LABOR_AGREEMENT
A.EMPL_STATUS	B.COURSE_START_DT		
A.EMPLID	B.DURATION_CONVERTED		
A. EMPL_CTG	B.EMPLID		
A. LABOR_AGREEMENT	B.PART_TIME_CRSE_FRA		
	B.SESSN_NBR		

PS_CONTRACT_DATA F	PS_CRSE_SESSN_TBL L
F.CONTRACT_TYPE IN	L.COURSE
F.EMPL_NUM	L.DURATION_CONVERTED

PS_CONTRACT_DATA F	PS_CRSE_SESSN_TBL L
F.EMPLID	L.SESSION_NBR
	L.SESSION_STATUS

Calculation of Group M Indicators - Sharing of Trainees by Age and Gender

To calculate group M Indicators - Sharing of Trainees by Age and Gender:

- Set up an employee contract on the Contract Data - Contract Status/Content page, and link the employee to a collective agreement on the Job Data - Job Labor page. Calculating Group M Indicators - Sharing of Trainees by Age and Gender.
- Set up the employee status to *Active*, *Leave of Absence*, or *Leave With Pay*.

PS_JOB A	PS_PERSONAL_DATA B	PS_EMPL_CTG_L1 C	PS_TRAINING D
A.EFFDT	B.BIRTHDATE	C.CATEGORY_2483_FRA	D.COURSE_END_DT
A.EFFSEQ	B.EMPLID	C.EMPL_CTG	D.COURSE_START_DT
A.EMPL_RCD	B.SEX	C.LABOR_AGREEMENT	D.EMPLID
A.EMPL_STATUS			
A.EMPLID			
A.EMPL_CTG			
A.LABOR_AGREEMENT			

CHAPTER 6

(GBR) Meeting Regulatory Requirements for the United Kingdom

This chapter provides an overview of U.K. regulatory requirements and discusses how to:

- Meet Working Time Directive requirements.
- Run the U.K. regulatory reports.

Understanding U.K. Regulatory Requirements

PeopleSoft provides the following U.K. regulatory reports to help you perform equal opportunity monitoring of your U.K. workforce by classifying job applicants, job offers, positions filled, and employees in specific gender and ethnic groups:

- Adverse Impact.
- Job Group Roster.
- Joint Staffing Report.
- Northern Ireland Report.
- Termination Analysis.
- Workforce Analysis.

Prerequisites

Before you manage fair employment, equal opportunity, and disability discrimination issues for a U.K. workforce, enter the following employee information:

- Gender information on the Personal Data - Personal History page.
- Ethnicity codes on the Personal Data - Identity/Diversity page.
- Disability information on the Disability page.

For the Northern Ireland Fair Employment Monitoring return, set up additional organization, employee, and applicant data. You need to:

- Identify the locations that are required to submit a Fair Employment Monitoring return by selecting the Northern Ireland Reportable check box on the Location Profile page.
- Assign a SOC (Standard Occupational Classification) code to each of your organization's job codes on the Job Code Profile page.

- Assign an employee class on the Job Data - Job Information page.
PeopleSoft delivers the codes required on the Fair Employment Monitoring return.
- Record employees' community background on the Personal Data - Identity/Diversity page.
- Record applicants' community background on the Applicant Eligibility/Identity page.

Warning! By law, Northern Ireland community background data for employees can be seen by a designated monitoring officer only. PeopleSoft has included a special role called HR Administrator NI (human resources administrator Northern Ireland) for this purpose.

See Also

Chapter 10, “(GBR) (USA) (USF) Meeting Disability Regulatory Requirements,” page 141

Meeting Working Time Directive Requirements

The European Working Time Directive as legislated in the U.K. restricts employers from requiring employees to work more than an average of 48 hours a week in any 17-week period. The legislation provides an opt-out provision in which employees choosing to work more than the legally allowed hours can do so by notifying the employer of this choice *in writing*. The directive also makes it illegal to discriminate, in pay or promotion, against employees exercising their right not to work more than 48 hours a week. Finally, the directive requires employers to provide 20 days of paid leave and standard daily break time allowances.

The Working Time Directive components provided in the system allow for the parameters to be set and adjusted, employee work hours per week to be set, and work hours by employee and department to be monitored. The system allows for exceptions to be noted for each employee if an employee requests exceptions.

This section discusses how to:

- Set up Working Time Directive parameters.
- Set Working Time Directive working hours per employee.
- Monitor Working Time Directive compliance.

Pages Used to Monitor Working Time Directive

Page Name	Object Name	Navigation	Usage
Working Time Directive Parameters and Defaults (GBR)	WRK_TIME_PARAM_UK	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements, Working Time Directive UK, Working Time Directive Parameters and Defaults	Make necessary adjustments to the Working Time Directive parameters. Although the directive provides guidelines for employers to follow and the system uses these parameters, the directive can change. In that case, the parameters need to be adjusted.
Working Hours Per Week (Employee)	WRK_TIME_EXCEP_UK	Workforce Monitoring, Meet Regulatory Rqmts UK, Monitor Working Time, Working Time Directive, Working Hours Per Week (Employee)	Set standard weekly working hours for employees and note exceptions.
Hours Worked Per Reference Period (Department)	WRKTIME_DEPTINQ_UK	Workforce Monitoring, Meet Regulatory Rqmts UK, Monitor Working Time, Review Dept Time Directive, Hours Worked Per Reference Period (Department)	Review Working Time Directive compliance by department.
Hours Worked Per Reference Period (Employee)	WRK_TIME_EEINQ_UK	Workforce Monitoring, Meet Regulatory Rqmts UK, Monitor Working Time, Review Employee Time Directive, Hours Worked Per Reference Period (Employee)	Review Working Time Directive compliance by employee.

Setting Up Working Time Directive Parameters

Access the Working Time Directive Parameters and Defaults page.

Working Time Directive Parameters and Defaults

Statutory Information

Reference Period (weeks):

17

Weekly Threshold (hrs/mins):

48

0

Contractual Hours

Standard Weekly (hrs/mins):

42

30

Standard Daily (hrs/mins):

8

30

Std Daily Break (hrs/mins):

1

0

Working Time Directive Parameters and Defaults page

Statutory Information

- Reference Period (weeks)

The directive requires average hours to be calculated on a reference period of 17 weeks.
- Weekly Threshold (hrs/mins) (weekly threshold [hours/minutes])

The directive requires no more than 48 hours worked in a week period.

Contractual Hours

Use the Contractual Hours group box to define standard working hours for your organization if you are not using the Work Schedule component for this purpose. By entering work schedule information here, the system pulls information from this page if working time data is updated and the employee doesn't have to enter information in the Work Schedule component.

- Standard Weekly (hrs/mins) (standard weekly [hours/minutes])

Enter the default standard weekly hours for contract employment.
- Standard Daily (hrs/mins) (standard daily [hours/minutes])

Enter the default standard daily hours for contract employment.
- Std Daily Break (hrs/mins) (standard daily break [hours/minutes])

Enter the standard daily minimum break allowance.

Setting Working Time Directive Working Hours per Employee

Access the Working Hours Per Week (Employee) page.

Working Hours Per Week

Niles, William Employee **EmplID:** PU018 **Empl Rcd#:** 0

Week Beginning Find | View All First 1 of 1 Last

11/11/2002

Work Schedule:

Holiday Schedule:

Total Worked (hrs/mins): 0 0 [Daily Exceptions](#)

Working Hours Per Week (Employee) page

Enter an employee ID to access the page. If information has been entered in the Work Schedule component, the system displays the work schedule and holiday schedule as entered on the Work Schedule page in the Administer Workforce, Monitor Absence component. If no data has been entered in the Work Schedule component, these fields do not appear.

Week Beginning

Click the calendar button to enter a date for the week.

Total Worked (hrs/mins) (total worked [hours/minutes])

Enter the total time worked for the week in hours and minutes. When you refresh the page, the system calculates the total time worked and takes into account all absences (general, holidays, vacations, parental and maternity). This calculation can be changed or corrected manually. If daily exceptions have been added, the field is display-only. In order to change totals, you must click the Daily Exceptions link.

Daily Exceptions

Access the Daily Exceptions page.

Working Hours Per Week

Niles, William

Week Beginning:07/11/2002 

	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
Expected Basic (hrs/mins):	0 0	8 30	8 30	8 30	8 30	8 30	0 0	42 30
Absence Indicator:								
Actual Worked (hrs/mins):	0 0	8 30	8 30	8 30	8 30	8 30	0 0	42 30
Break (hrs/mins):	0 0	1 0	1 0	1 0	1 0	1 0	0 0	5 0
Total Worked (hrs/mins):								37 30

Daily Exceptions page

Enter a date and click the link on the Working Hours Per Week page. Use this page to note exceptions—particularly, those provided by the employee in writing. Update the working hours by entering daily exception hours in the Actual Worked and Break fields.

The page displays the expected work schedule as entered in either the Work Schedule component or the Contract Hours group box on the Working Time Directive Parameters and Defaults page. It displays absences that have been entered in the Absence component or the Parental or Maternity Leave component.

Monitoring Working Time Directive Compliance

Access the Hours Worked Per Reference Period (Department) page.

Hours Worked Per Reference Period

Department: 10000 Human Resources
Company: GBI Global Business Institute
Begin Date: 05/18/2001  **End Date:** 11/06/2002 
Weekly Threshold (hrs/mins): 40 0

Hours Worked Per Reference Period (Department) page

Select a department to access the page. Enter the date for the reference period to begin. By default, the system calculates an end date based on the 17-week parameter. Although by default the system applies values for the dates and weekly threshold as entered on the Working Time Directive Parameters page, these can be modified manually. Click the Refresh button to update the page when the fields are complete.

Cumulative Total

The page displays any employees for which exceptions have been entered, indicating that they may have exceeded the established working hours. Click the employee name link to view the weekly details for that employee.

If exceptions have been entered at the daily level, the Daily Detail link appears on the line corresponding to the week for which the exceptions apply. Click the Daily Detail link to display the daily exceptions for that week.

Access the Hours Worked Per Reference Period - Employee page.

Hours Worked Per Reference Period

Niles, William	Employee	EmplID: PU018	Empl Rcd#: 0
Reference Period (weeks):	17		
Begin Date:	11/20/2002	End Date:	

Hours Worked Per Reference Period (Employee) page

By default, the system uses the 17-week reference period, but you can change the value. Enter a begin date for the period and click the Refresh button. The system automatically calculates the end date based on the reference period designated.

Again, the system displays a Daily Detail link for the weeks for which daily exceptions were entered.

Running the U.K. Regulatory Reports

This section discusses how to run the Northern Ireland Report.

Pages Used to Run the Regulatory Reports

Page Name	Object Name	Navigation	Usage
Adverse Impact – Parameters	RUNCTL_FROMTHRU	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Adverse Impact, Parameters	Use this page to run the Adverse Impact report (APP001UK). This report displays the breakdown of job offers versus applications by UK-specific ethnic groups and by gender.
Terminations Analysis – Parameters	RUNCTL_FROMTHRU	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Terminations Analysis, Parameters	Use this page to run the Termination Analysis report (PER019UK) that displays the current employee count and the number of terminations.
Workforce Analysis – Parameters	RUNCTL_PER025UK	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Workforce Analysis, Parameters	Run the Workforce Analysis report (PER025UK). This report tracks hiring practices by department, or other organizational units, based on job titles in the department.
UK Job Group Roster	RUNCTL_PER030UK	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Job Group Roster, UK Job Group Roster	Run the Job Group Roster report (PER030UK) that lists employees in job groups.
Joint Staffing	RUNCTL_ASOFDATE	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, Joint Staffing	Run the Joint Staffing report (PER037UK). This report breaks down the workforce by job code, gender, and full-time or part-time status.
Fair Empl. Monitoring Return (fair employment monitoring return)	RUNCTL_UKNI	Workforce Monitoring, Meet Regulatory Rqmts UK, Reports, NI Fair Employments, Fair Empl. Monitoring Return	Run the Northern Ireland report (UKNI001). This report indicates the religious composition of the workforce, job applicants, and appointees. The report format emulates the Monitoring return, which is required by organizations operating in Northern Ireland.

Running the Northern Ireland Report

Access the Fair Empl. Monitoring Return page.

Fair Empl. Monitoring Return

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

Language: English

Parameters - Part E

*EmplID: KG0001 Tendulkar, Indira

*As Of: 01/01/1990

Public Authorities ☐

Fair Empl. Monitoring Return page

Parameters - Part E

EmplID

Select the employee who is responsible for submitting the Fair Employment Monitoring return. This is the person who signs the form and whose name appears in Part E of the form.

The system uses the selected employee's job data to determine the company for which the report is run.

As Of

Select the end date for the report. The system generates the report for the year ending on the date that you enter here.

CHAPTER 7

(NZL) Meeting Regulatory Requirements for New Zealand

This chapter discusses how to set up the New Zealand Accident Rehabilitation and Compensation Insurance (ARCI) table.

Setting Up the ARCI Table

ARCI is administered by the Accident Rehabilitation and Compensation Corporation, which regulates and administers a no-fault workers compensation plan. The codes in the ARCI table are used on the Company Table - Default Settings page. These codes identify your organization's employment risk level and provide the basis for determining the premium amounts paid to ARCI.

Note. PeopleSoft provides the standard classification units for ARCI.

This section discusses how to define classification units.

Page Used to Set Up the ARCI Table

Page Name	Object Name	Navigation	Usage
Class Unit Table (classification unit table)	CLS_UNT_TBL_NZL	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements, Class Units NZL, Class Unit Table	Modify existing classification units or add new classification units used in the calculation of ARCI premiums.

Defining Classification Units

Access the Class Unit Table page.

Class Unit Table

Class Unit: 73210

Class Unit Details

Find | View All First 1 of 1 Last

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

***Description:** Bank Operations

Short Desc: Bank Ops

ERP Rate: 1.27

Class Unit Table page

ERP Rate (employment
risk premium rate)

Enter the rate based on the industry and the level of risk associated with that industry. The government provides these rates as set by regulation.

CHAPTER 8

(USA) Meeting Regulatory Requirements for the United States

This chapter provides an overview of U.S. regulatory requirements and discusses how to:

- Set up control tables for regulatory requirements.
- Meet Equal Employment Opportunity and Affirmative Action Plan (EEO/AAP) reporting requirements.
- Meet Job Group Movement Analysis reporting requirements.
- Meet Veterans Employment and Training Service-100 (VETS-100) reporting requirements.
- Run the U.S. regulatory reports.

Understanding U.S. Regulatory Requirements

If U.S. government employment regulations apply to your company, you need to implement plans and practices to ensure that your company consistently meets U.S. reporting requirements.

PeopleSoft Human Resources provides tables to help you manage the information that you need to comply with the Americans with Disabilities Act (ADA). Veterans Employment and Training Service (VETS) is the only report in which disabled employees are counted. Additionally, PeopleSoft provides the following regulatory reports:

- Adverse Impact.
- EEO-1 Employer Information.
- EEO-1 Job Analysis Report.
- EEO-4 State and Local Govt.
- EEO-5 Job Analysis.
- IPEDS-S Report.
- Job Group Analysis.
- Job Group Analysis Summary.
- Job Group Movement Analysis.
- Job Group Roster.
- PRWORA - New Hire.
- OSHA-200 Log.

- Terminations Analysis.
- VETS-100 Process.
- VETS-100 Analysis.
- VETS-100 Submit.
- Workforce Analysis.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Monitor Health and Safety

Setting Up Control Tables for Regulatory Requirements

You must set up information in the Establishment table to meet U.S. regulatory requirements.

This section discusses how to:

- Define affirmative action plans.
- Define job tasks codes.

Pages Used to Set Up Control Tables for Regulatory Requirements

Page Name	Object Name	Navigation	Usage
Affirmative Action Plan	AAP_TBL	Workforce Monitoring, Meet Regulatory Rqmts, Maintain Affirmative Actn Plan, Affirmative Action Plan	Define the affirmative action plans. Affirmative Action plans are defined by establishment ID or by job group.
Establishment Table	ESTAB_TBL1_GBL	Workforce Monitoring, Meet Regulatory Rqmts, Define Regulatory Reqmts Data, Establishments, Establishment Table	Identify the establishment, indicate its regulatory region, and enter the address.
EEO Job Group (Equal Employment Opportunity job group)	EEO_JOB_GROUP	Workforce Monitoring, Meet Regulatory Rqmts, Define Regulatory Rqmts Data, Job Groups, EEO Job Group	Set up EEO job group codes.
Job Task Table	JOB_TASK_TABLE	Workforce Monitoring, Meet Regulatory Rqmts, Define Regulatory Rqmts Data, Job Tasks, Job Task Table	Define job task outcomes. For example, if a job requires an employee to pick up heavy boxes and move them, then define <i>moving</i> heavy boxes as the essential job task. Do not define the job task as <i>lifting</i> heavy boxes because an employee with a disability could use a forklift to move them.
Job Code Task Table	JOBCODE_TASK_TABLE	Workforce Monitoring, Meet Regulatory Rqmts, Define Regulatory Rqmts Data, Job Code Tasks, Job Code Task Table	Define job tasks associated with each job code.
Controlled Establishments	CONTROLLED_ESTABS	Workforce Monitoring, Meet Regulatory Rqmts, Review Controlled Estb Ids, Controlled Establishments	Shows all establishments that have designated the selected headquarters unit as their controlling establishment.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Setting Up Organization Foundation Tables,” Defining Establishments

Defining Affirmative Action Plans

Access the Affirmative Action Plan page.

Affirmative Action Plan

Establishment ID: KU001 Global Business Institute HQ

Plan Description: GBI HQ Affirmative Action Plan

Person Responsible: KU0001 Lewis, Douglas

Plan Year Find | View All First 1 of 1 Last

***Start Date:** 01/01/2000 **End Date:** 01/01/2001 ☐ **Active**

Job Groups Represented in Establishment Customize | Find First 1-2 of 2 Last

	*EEO Job Group		Minority Goal	Female Goal	Allocate Goals		
1	KU001	Administrative Assistant	33	18	Allocate Goals		
2	KU002	Administrative Employees	48	26	Allocate Goals		

Affirmative Action Plan page

Plan Description

Enter a description of this affirmative action plan.

Person Responsible

Select the employee ID of the person responsible for administering this plan.

Plan Year**Start Date, End Date, and Active**

Enter the start date of this plan. The system calculates the end date and selects the Active check box if this is the current year plan.

Job Groups Represented in Establishment**EEO Job Group, Minority Goal and Female Goal**

Select an EEO job group and enter the minority goal and female goal for that job group.

Allocate Goals

Click the Allocate Goals link to access Ethnic Group, Total Goal and Female Goal fields.

Allocate Goals**Ethnic Group, Total Goal and Female Goal**

Enter the plan's total and female goals for the selected ethnic group. Click the Roll Up Values links to add the goals for the Minority Goal and Female Goal. Click the Done button to return to the main page. These values will be rolled forward to the EEO Job Group Goals in the Job Groups Represented in Establishment group box.

Defining Job Task Codes

Access the Job Code Task Table page.

Job Code Task Table

SetID: SHARE **Job Code:** 140035 Analyst-Financial
Location SetID: SHARE **Location Code:** KCQC00 Montreal Office

Job Code Find | View All First 1 of 1 Last

***Effective Date:** 01/01/1980 **Total Percent Time Spent:** 100.00

Detail								Customize Find View All First 1-2 of 2 Last	
	*Jobtask SetID	Job Task	Descr	*Imprtce	*Freq	*Cons.	% Time Spent		
1	SHARE	K00010	Data Conversion	Esse	Wee	Quite S	60.00		
2	SHARE	K00037	System Design	Margi	Dail	Very Mi	40.00		

Job Code Task Table page

Total Percent Time Spent	The system calculates and displays this when you move out of the % Time Spent field. The total cannot exceed 100%.
Jobtask SetID	Select from Jobtask SetID. Valid values are stored on the TableSet ID page.
Job Task	Select from Job Task. Valid values are stored on the Job Task Table page.
Imprtce (importance)	Select the importance of the job task to the particular job code. Valid values are in the Translate Table.
Freq (frequency)	Enter how often the job task occurs for each job code. Valid values are in the Frequency Table.
Cons. (consequence)	Select the result that occurs if the job task isn't performed. Valid values are in the Translate Table.
% Time Spnt (percentage time spent)	Enter the percentage of time that is spent on the job task.

Note. Once created, this information is particularly useful for discussing job requirements with applicants. Although the ADA prohibits you from asking applicants if they have disabilities, you can show them a job's task list and ask them if they might have difficulties in completing the tasks. This way, you offer the applicants the opportunity to describe their disabilities and any accommodations that they need to perform the job tasks.

Meeting Equal Employment Opportunity and Affirmative Action Plan Reporting Requirements

PeopleSoft Human Resources supports Equal Employment Opportunity/ Affirmative Action Plan (EEO/AAP) reporting requirements by enabling you to classify jobs and positions filled by applicants and employees in specific gender and ethnic groups. Use this information to define affirmative action goals and timetables and generate the necessary government reports.

Requirements that have been set forth by the U.S. Government have made it necessary that Affirmative Action plan and goal information be reported based on Establishments and Job Groups. Regulations pertaining to EEO/AAP reporting are Executive Order 11246 (EEO) and Public Law 88-352, Title VII of the Civil Rights Act of 1964, as amended by the Equal Employment Act of 1972. Record keeping and reporting requirements have been amended by Title 41 of the Code of Federal Regulations part 60-2 (AAP reporting) and part 61-250 (VETS reporting).

PeopleSoft Human Resources supplies standard reports with the appropriate information in the standard federal reporting format.

This section discusses:

- Using U.S. establishment functionality.
- Setting up EEO reporting requirements.
- Adverse impact reporting requirements.

Using U.S. Establishment Functionality

The U.S. Government set requirements for Affirmative Action plan and goal information reporting based on Establishments and Job Groups. The Establishment/Location allows for a many-to-many relationship to exist between Location and Establishment ID.

You can enter the regulatory region that is associated with the location. Select one or more establishment IDs for the location. You can also use the establishment-location relationship for Affirmative Action planning, EEO, OSHA (Occupational Safety and Health Administration), and other U.S. federal reporting regulations. Enter one or more location codes to associate with the establishment.

Note. In order for reports to be counted, populate the Establishment ID on the job record for employees in US locations.

See *PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, “Setting Up Organization Foundation Tables,” Defining Establishments.

Establishments in Affirmative Action Reporting

EEO reports are organized by *establishment*. A company's headquarters unit and each of its hiring locations are considered separate establishments. A single-establishment employer is required to file a single report. A multi-establishment employer (doing business at more than one hiring location) files separate reports for each of the following locations:

- The organization's principal or headquarters office.

- Each hiring location employing 50 or more persons.

In addition, multi-establishment employers must file a consolidated report covering all establishments, as well as a list of all the establishments with less than 50 employees that are included in the tabulations on the consolidated report but for which no individual establishment report is filed.

Note. PeopleSoft Human Resources does not provide consolidated reporting information for companies with a total of fewer than 50 persons if all establishments are located in a single state.

Setting Up EEO Reporting Requirements

The Equal Employment Opportunity Commission (EEOC) requires that most companies file one or more reports from the series EEO-1 through EEO-5. These reports count male and female employees in certain ethnic groups by federal employment categories. Before running the EEO reports, you need to set up the following data about your organization's establishments and EEO job categories:

1. Create U.S. establishments on the Establishment - Establishment Address page.
2. Enter EEO job categories on the Job Code Table - Job Code Profile page.
3. Assign establishment IDs on the secondary page of the Location Table - Location Profile page.

Understanding Adverse Impact Reporting Requirements

The Adverse Impact report provides analysis information on recruitment and hiring practices to help determine whether specific actions by an employer are influenced by ethnicity, sex, or other EEO/AA issues. The report compares employment hiring decisions for white males to members of ethnic minorities and females. The government requires certain employers to assess adverse impact annually. This report helps in determining the effect of EEO/AA issues on hiring practices and employee movements in an organization, such as promotions, transfers, and terminations.

Use the report to detect evidence of adverse selection within ethnic groups in the recruitment and hiring activities. The report compares white males, selected ethnic groups, and sex, and includes a total for each group and for each category as a whole. In addition to the count totals, the report calculates the ratio of total offers in each group to the total applicants in the group, and the impact on ethnic minorities as compared to white males.

Entering Applicant Data for the Adverse Impact Report

You need to enter certain data for job applicants and employees before you run the Adverse Impact report. The system recognizes a person as both a new hire and an applicant for purposes of the Adverse Impact report if you hire the person through the Hire component in PeopleSoft Human Resources Administer Workforce.

However, if you enter a person as an applicant through PeopleSoft Human Resources Recruit Workforce, the system only counts the applicant for the Adverse Impact report if you complete certain fields on the Applicant Personal Data page and the Application Data page. The following table shows the pages and fields in PeopleSoft Human Resources Recruit Workforce that you must complete for the Adverse Impact report to run properly.

Affected Page	Affected Fields	Comments
Application Data - Applicant Contact Information page	Name	Must be completed.
Applicant Data - Eligibility/Identity page Applicant Data - Eligibility/Identity page	Gender Ethnic Group	Must be completed.
Application Data - Applicant Application Info Application 1 page Application Data -Applicant Requisition Application 2 page	Any field	Before running the report, change at least one default value on these pages.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce, “Managing Applicants,”
Entering Additional Applicant Information

Meeting Job Group Movement Analysis Reporting Requirements

The AAP Job Group Movement Analysis report helps you analyze which gender and ethnic groups are moving in and out of your organization or which groups are offered opportunities to advance. It reports the number of people in protected classes that are affected by specific job action categories. Use this report to see how employees move through career progressions within your company, especially if you are initiating or complying with affirmative action plans. It shows the number of people by ethnic group and gender being affected by specific personnel actions, including applications, offers, hires, promotions, and terminations in each job group.

Entering Applicant Data

The system recognizes a person as both a hire and an applicant for purposes of the Job Group Movement report if you hire the individual through the Hire component in the PeopleSoft Human Resources Administer Workforce.

However, if you enter a person as an applicant through PeopleSoft Human Resources Recruit Workforce, the system only counts the applicant for the Job Group Movement report if you complete certain fields on the Applicant Personal Data page and the Application Data page. The following table shows the pages and fields in PeopleSoft Human Resources Recruit Workforce that relate to the Job Group Movement report.

Affected Page	Affected Fields	Comments
Applicant Data - Applicant Contact InfoPage	Name	Must be completed.
Applicant Data -Eligibility/Identity Page	Gender	Must be completed.
Applicant Data - Eligibility/Identity Page	Ethnic Group	Must be completed.
Application Data - Applicant Application Info1 Page Application Data - Applicant Requisition2 Page	Any field	Before running the report, change at least one default value on this page.
Track Applicant Activity - Routings Page	Job Requisition # Position Number Job Code	To run the report, complete one of these fields.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce, “Managing Applicants,” Entering Basic Applicant Information

PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce, “Managing Applicants,” Entering Additional Applicant Information

PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce, “Processing Applicants,” Tracking Applicants

Meeting VETS-100 Reporting Requirements

Under the Veterans Employment Opportunity Act of 1998, certain employers must submit the VETS-100 Report (Veterans Employment and Training Service-100 Report) as part of the Federal Contractor Program. If your organization is a nonexempt federal contractor or subcontractor with contracts or subcontracts totaling \$25,000 or more, you must submit the report to the Department of Labor every year.

The report details the number of special disabled veterans, Vietnam-era veterans, and other protected veterans in your workforce by job category and hiring location, as well as the total number of employees, special disabled veterans, Vietnam-era veterans, and other protected veterans hired during the reporting period.

This section discusses how to:

- Set up the VETS-100 report.

- Enter data for the VETS-100 report.

Setting Up the VETS-100 Report

If you are a federal contractor subject to VETS-100 reporting requirements, you must set up specific company, establishment, job code, and employee information in your system before you run the report. Run the VETS-100 Process to perform the calculations and load the values into a temporary table, and then run the VETS-100 Analysis process to create a report of the findings for internal use (optional) and the VETS-100 Submit process to create the digital file for submission.

Using Military Discharge Date

Use the Military Discharge Date to enter the discharge date for employees. This date is used for future reporting cycles in order to determine which veterans qualify for the Newly Separated Veteran designation. The Military Discharge Date provides accurate data for the following year's reporting cycle. The functionality also provides tracks Newly Separated Veterans. However, this category is not included in the VETS-100 report because the requirement is optional for the 2002 reporting year. In future reporting cycles, Newly Separated Veterans will be determined by verifying that a valid Military Status is selected and that the Military Discharge Date is within 365 days of the reporting date.

Establishments in VETS-100 Reporting

VETS-100 reporting is organized by establishment. A company's headquarters unit and each of its hiring locations are considered separate establishments. A single-establishment employer files a single completed form. A multi-establishment employer (doing business at more than one hiring location), files separate forms for each of the following locations:

- The organization's principal or headquarters office.
- Each hiring location employing 50 or more persons.
- Each hiring location employing fewer than 50 persons.

The USF Vets-100 by POI (U.S. federal veterans-100 by personnel office identifier) report generates a Veterans employment report by POI.

The USF Vets-100 by Sub-Agency report generates a Veterans employment report by sub-agency.

VETS-100 Process

Because the VETS-100 report is complex and time consuming to run, PeopleSoft has separated the process from the report. Run the process on a high-powered server at a time when it is not heavily used. You can also run the process by establishment over the course of a few days, rather than running it for all employees at once.

The VETS-100 Process collects the data and stores it in a temporary table. The data stays in this table until you run the VETS-100 Submit process for it. Running the VETS-100 Process successive times does not delete or overwrite data unless you run it twice for the same establishment or fail to run the VETS-100 Submit process between reporting years.

VETS-100 Analysis

The VETS-100 Analysis process is an informational report that displays the data that you submit to the government when you create the VETS100.TXT file with the VETS-100 Submit process. Running this report does not affect the data in the temporary table. Run the VETS-100 Process before running this report. You can also use the VETS-100 Analysis process to report on VETS-100 history; you cannot report on years before 2000.

Vets-100 Submit

The VETS-100 Submit process creates a digital file that meets the VETS specifications using the data in the temporary table and transfers the data from the temporary table to a history table. The VETS-100 Submit process only removes data from the temporary table that should be written to the digital file. If the temporary table contains data for the entire organization and you run the VETS-100 Submit process for the headquarters only, data for establishments outside of headquarters remains in the temporary table until you run the VETS-100 Submit process to capture it. You can also use the VETS-100 Submit process to recreate a digital file based on VETS-100 history.

Minimum and Maximum Employee Calculation Method the PER027.SQR uses a method in which the first day of the selected reporting period is compared to the last day of the reporting period. The day with the most employees is considered the maximum count, while the day with the fewest is considered the minimum count. This method is very broad and VETS does not prefer this method. However, the preferred method according to VETS regulation is not required and the method used is subject to the discretion of the employer reporting the data.

Entering Data for the VETS-100 Report

Before you run the VETS-100 Process, complete the tables and fields required for the report.

Affected Page	Affected Fields	Comments
Company Table - Company Location		The company must be set up for the report to run properly.
Company Table - Default Settings	Federal EIN (federal employer's tax identification number)	This nine-digit number assigned by the Internal Revenue Service is required for VETS-100 reporting.
Establishment - Establishment Address	Establishment Description Address Headquarters Unit	Each company for which you perform VETS-100 reporting must identify an establishment as its headquarters unit. A company is a single-establishment company, if this establishment is also the headquarters unit. If the company is a multi-establishment company, you must designate an establishment as the headquarters unit. This setup is essential for the VETS-100 Federal Contractor Structured Query Report (SQR) to work properly.

Affected Page	Affected Fields	Comments
Establishment - Establishment Address	NAICS code (North American industrial classification system code) VETS-100 Unit Number Dun and Bradstreet Number	This is a six-digit classification code that identifies the industrial classification of your company's primary economic activity. This information appears on the VETS-100 report. If the government requires you to provide a standard industrial classification (SIC) code instead of a NAICS code, enter it in the NAICS field. The government no longer uses the VETS-100 Unit Number for VETS-100 reporting. Use this field to enter the company number provided by the Department of Labor. The Dun and Bradstreet number is also referred to as the DUNS number or the Dun and Bradstreet Universal Numbering System.
Job Code Table - Job Code Profile	Job code EEO-1 Job Category	If you are a federal contractor subject to VETS-100 reporting requirements, you must report on all employees within your company. All of the job codes must be linked to an EEO-1 job category, and all employees must be assigned a job code. When you assign a job code to an individual employee in the Job Data component, the employee is automatically linked to an EEO-1 job category. When you run the VETS-100 report SQR, the system processes the employee's veteran status information and combines it with other employees within the same EEO-1 job category.

Affected Page	Affected Fields	Comments
Applicant Data - Eligibility/Identity	Employee military status	If you select <i>Viet Vet</i> (Vietnam veteran) as an employee's military status, the system includes the employee in the count for the Vietnam Era Veterans column of the VETS-100 report.
Disability	All	If you select the Disabled Veteran check box, the system includes the employee in the Special Disabled Veterans column of the VETS-100 report.

See Also

Chapter 10, “(GBR) (USA) (USF) Meeting Disability Regulatory Requirements,”
Managing Accommodation Data, page 142

Running the U.S. Regulatory Reports

This section provides pages used to run the U.S. regulatory reports and discusses how to run the EEO-1 Job Analysis report.

Pages Used to Run the U.S. Regulatory Reports

Page Name	Object Name	Navigation	Usage
Adverse Impact	RUN_CNTL_REG	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Adverse Impact	Run the Adverse Impact report (APP001) to provide information on recruitment and hiring practices.
Job Group Movement Analysis	RUN_CNTL_REG	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Job Group Movement Analysis	Run the Job Group Movement Analysis report (APP002) to provide gender and ethnic group movements in and out of an organization and tracks career patterns.
Terminations Analysis	RUN_CNTL_REG	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Terminations Analysis	Run the Terminations Analysis report (PER019) which analyzes terminations within your organization.
Job Group Analysis	RUN_CNTL_REG	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Job Group Analysis	Run the Job Group Analysis report (PER024) to analyze the makeup of your workforce based on skills groups.

Page Name	Object Name	Navigation	Usage
Job Group Analysis Summary	RUN_CNTL_REG	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Job Group Analysis Summary	Run the Job Group Analysis Summary report (PER024A) to analyze the makeup of your workforce based on job groups.
Workforce Analysis	RUN_CNTL_REG	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Workforce Analysis	Use this page to run the Workforce Analysis report (PER025). This report tracks hiring practices by department based on job titles.
Job Group Roster	RUN_CNTL_REG	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, Job Group Roster	Run the Job Group Roster report (PER030) which lists employees in job groups in job title order. It includes the ethnic background and the current salary information.
EEO-1 Employer Info	RUNCTL_PER016	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO-1 Employer Info	Run the EEO-1 Employer Information report (PER016). The report can be run under a formal Government run (<i>GOVT</i>) or an Informational run (<i>INFO</i>). Run the <i>GOVT</i> parameter only when preparing reports for the government. At any other time, run the report using <i>INFO</i> as the parameter.
EEO-1 Job Analysis Report	RUNCTL_PER017	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO-1 Job Analysis Report	Run the EEO-1 Job Analysis report (PER017). This report supplies standard job category counts instead of employee counts for the private sector.
EEO-4 State/Local	RUNCTL_PER031	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO-4 State/Local Govt	Run the EEO-4 State and Local Government report (PER031). This report provides employment counts in the prescribed format for state and local governments.
EEO-5 Job Analysis	RUNCTL_ASOFDATE	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO-5 Job Analysis	Run the EEO-5 Job Analysis report (PER022). This report supplies standard job category counts for school-related categories.
OSHA-200 Log (Occupational Safety and Health Administration – 200 log)	RUNCTL_CAENDARYR	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, OSHA-200 Log	Run the OSHA-200 Log report (OHS001). This report lists the case numbers and details of each injury and illness that occurred during a particular calendar year.

Page Name	Object Name	Navigation	Usage
Vets-100 Process	RUNCTL_PER027	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 Process	Run the VETS-100 Process (PER027). This report lists federal job classifications and the number of employees and new hires in the last 12 months who are disabled veterans or Vietnam veterans.
Vets-100 Analysis	RUNCTL_PER027C	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 Analysis	Use this page to run the VETS-100 Analysis report (PER027C). This reports on the VETS-100 data created by the VETS-100 process.
Vets-100 Submit	RUNCTL_PER027C	Workforce Monitoring, Meet Regulatory Rqmts, VETS-100 Reports, VETS-100 Submit	Use this page to run the Vets-100 Submit (PER027C). This report creates the digital file for submission to the government.
FEDERAL PRWORA - New Hire	RUNCTL_PER036	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, PRWORA - New Hire	Run the PRWORA - New Hire report (PER036). This report provides the information employers furnish to the Federal Directory of New Hires after hiring a new employee.
STATE PRWORA - New Hire	RUNCTL_PER036_S	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, PRWORA - New Hire, STATE PRWORA - New Hire	Run the State PRWORA - New Hire report (PER036S). This report provides the information employers furnish to the State Directory of New Hires after hiring a new employee.
IPEDS-S Report (Integrated Postsecondary Education Data System-Full Staff Survey report)	RUNCTL_PER040	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, IPEDS-S	Run the IPEDS-S (Fall Staff Survey) report (PER040). This report is a mandatory report for U.S. higher education institutions that receive funding from a U.S. Federal government program. The report is divided into separate parts for different types of employee: full-time faculty members, other full-time employees, part-time employees, and new hires.

Running the EEO-1 Job Analysis Report

Access the EEO-1 Job Analysis page.

EEO-1 Job Analysis

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

Language: English

Report Request Parameter(s)

As Of Date:

☐ Also output CSV File

☐ Include Column Headers

Run Report for

☒ Establishments in Company AD U.S. Arms Control and Disarmam

☐ Single Establishment State of Accord

☐ HQ & Controlled Establishments

☐ All Establishments

EEO-1 Job Analysis page

Also output CSV file (also output to comma-separated value file)

Select to print the CSV file along with the EEO-1 Job Analysis report.

Include Column Headers

This is available if you select Also output CSV file. Select to include column headings in the CSV file.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” Meet Regulatory Requirements Reports

CHAPTER 9

(USF) Performing Central Personnel Data File Edit Processing

This chapter provides an overview of regulatory requirements for U.S. federal agencies and discusses how to:

- Set up control tables for regulatory reports.
- Process Central Personnel Data File (CPDF) files.
- Submit parent locator information.
- Run equal employment opportunity (EEO) reports.
- Run veterans (VETS) reports.
- Run the SF113-A and SF113-G reports.

Understanding Regulatory Requirements for U.S. Federal Agencies

PeopleSoft provides the following U.S. federal agency regulatory reports:

- CPDF Error.
- EEO Groups by PATCOB/POI.
- EEO Groups by PATCOB/SubAgency.
- EEO Groups by Series/POI.
- EEO Groups by Series/Sub-Agency.
- SF113-A.
- SF113-G.
- VETS - 100 by POI.
- VETS - 100 by Sub-Agency.

See Also

Chapter 8, “(USA) Meeting Regulatory Requirements for the United States,” page 107

Setting Up Control Tables for Regulatory Reports

Set up information in the following tables in order to meet U.S. federal regulatory requirements.

This section discusses how to:

- Add CPDF fields.
- Specify CPDF edit prefixes and fields.
- Specify edit content.
- Enter edit details.

Pages Used to Set Up Control Tables

Page Name	Object Name	Navigation	Usage
CPDF Fields USF (Central Personnel Data File fields United States Federal)	GVT_CPDF_FIELDS	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements, CPDF Fields USF	Verify or add CPDF fields. Complete the CPDF Fields page for every data element required in your agency's CPDF submissions before using this page.
Prefixes & Fields	GVT_CPDF_PREFIX	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements, CPDF Edits USF, Prefixes & Fields	Specify the CPDF edit number, edit prefix, category and ID, and fields used in the edit. The three-digit edit prefix identifies the data element subject to the edit.
Edits	GVT_CPDF_EDIT	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements, CPDF Edits USF, Edits	Specify the edit content.
OPM CPDF Maint Details (Office of Personnel Management Central Personnel Data File Maintenance Details)	GVT_OPM_EDITUPDT	Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements, CPDF Edits USF, Edits Click the OPM Update Maintenance Details link.	Enter edit details.

Adding CPDF Fields

Access the CPDF Fields page.

CPDF Fields

Field Number: 1

Field Name: **Field Type:**

Field Length: **Status Start Position:** **Dynamic Start Position:**

Default Field Value (File):

Default Field Value (Table):

Pad Field: **Pad Character:**

Truncate Field?:

Edit Mask:

Comment:

CPDF Fields page

Field Name	Enter the PeopleSoft field name that corresponds to the field number.
Field Type	Define the field type. Values are <i>Char</i> (character), <i>Date</i> , and <i>Number</i> .
Field Length	Enter the length of the field as it needs to be reported.
Status Start Position	This field is display-only.
Dynamic Start Position	This field is display-only.
Default Field Value (File)	Enter the value that you want to appear in the resulting CPDF file.
Default Field Value (Table)	Enter the value that you want to appear in the working table, which in most cases is an asterisk (*).
Pad Field	Enter the type of field padding. Options are <i>Left</i> , <i>Right</i> , or <i>No Padding</i> . If you select <i>Left</i> or <i>Right</i> , provide a pad character.
Pad Character	If a field is to be padded, enter the character used for padding. For example, <i>0</i> might be used to left pad a numeric field.
Truncate Field?	Specify whether or not a field should be truncated by selecting <i>Yes</i> or <i>No</i> .
Edit Mask	Provide an edit mask used for field formatting the CPDF tables. CPDF programs support all the standard edit masks available in SQR.

Specifying CPDF Edit Prefixes and Fields

Access the Prefixes & Fields page.

Prefixes & Fields **Edits**

Edit Prefix: 005

***Description:** Instructional Program

Edit Information Find | View All First 1 of 6 Last

Edit Category: 02 **Edit ID:** 3 Status and Dynamic

Error Default Overrides Customize | Find First 1 of 1 Last

Field Number	Field Name	Field Length	CPDF Table Default Value
1	52 GVT_CPDF_INST_PROG	6	*

Prefixes & Fields page

Edit Category Enter a two-digit edit category to identify the data element edit.

Edit ID Select *Status*, *Dynamic*, or *Status and Dynamic*. The edit ID identifies the file to which this edit applies.

Enter additional combinations of edit category and edit ID for this edit prefix by using the arrows in the Edit Information group box to scroll among combinations.

Field Number Enter the number for fields affected by this edit.

When you move out of the field, the system populates the Field Length field and Default Field Value field with the values that you entered in the CPDF Fields page. Enter additional fields for this edit by using the arrows in the Error Default Overrides group box.

Specifying Edits

Access the Edits page.

Edit Prefix: 005 **Description:** Instructional Program

Edit Information

Edit Category: 02 **Edit ID:** 3 Status and Dynamic

Status

***Effective Date:** 02/01/1995 ***Sub-edit Number:** 1 ***Status:** Active

[OPM Update Maintenance Details](#) [Comparison Value Legend](#)

CPDF Relational Edit

If/Then Code	Seq Nbr	Left Field Number	Field Name	Comparison Code	Compared To	Compare Value 1	Compare Value 2	Right Field Number
If	1	50	GVT_CPDF_HI_ED_LVL	Greater Than	Value	12	0	
Then	1	52	GVT_CPDF_INST_PROG	Not Equal	Value	#	0	

Edits page

Note. Not all page elements are visible on this page. See additional elements by scrolling horizontally.

The Edit Prefix, Description, Edit Category, and Edit ID appear by default from the Prefixes & Fields page. Use the arrows in the Edit Information group box to view edits with the same prefix.

Sub-edit Number

Enter a sub-edit number. Most edits have one sub-edit number: 1. For complicated edits with multiple or nested If/Then statements, insert rows with higher sub-edit numbers. Keep the same effective date for multiple sub-edits.

Create an edit by concatenating If and Then statements. Scroll among If and Then statements using the arrows in the Status group box. Compose the body of the If – Then statement in the CPDF Relational Edit grid area.

Status

Add data rows and use the middle scroll arrow, the Effective Date field and the Status field to maintain edit history data for information that changes over time. For example, to inactivate the edit based on Office of Personnel Management (OPM) updates, insert an effective-dated row with a status of *Inactive*.

OPM Update Maintenance Details

Click this link to edit details as edits are added or updated.

CPDF Relational Edit

If/Then Code and Seq Nbr (sequence number)

Select either *If* or *Then*, and assign a sequence number for each separate condition to be edited. The If statements have sequence numbers 1, 2, and 3, and the reciprocal Then statements have sequence numbers 1 and 2. The pieces are connected by "or." For this example, the equation reads "If 1 or 2 or 3, then 1 or 2."

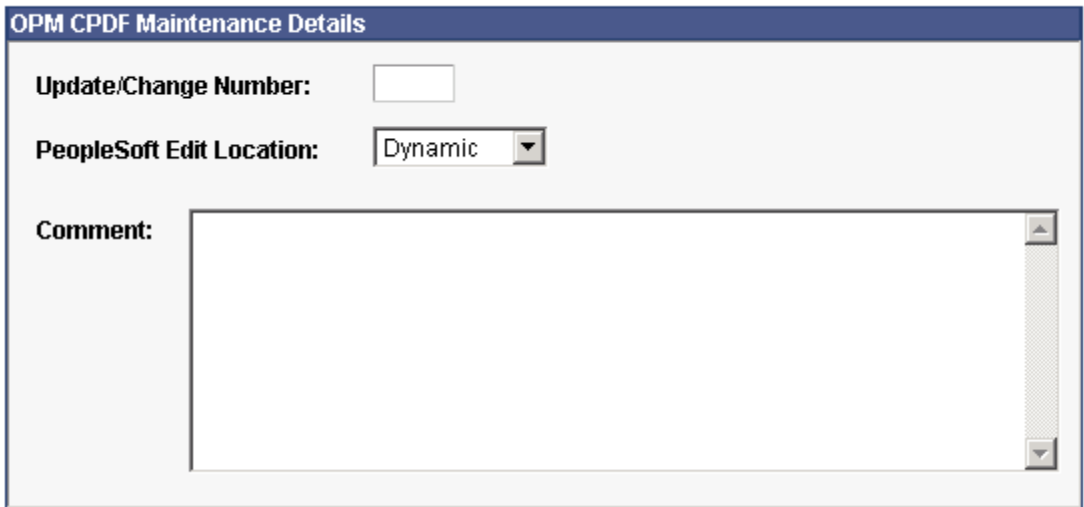
Left Field Number	Select a field number for comparison from the list of valid values. You enter field numbers in the CPDF Fields page.
Comparison Code	Select from the list of translate values: <i>Between, Equal to, Greater Than or Equal To, Greater Than, Less Than or Equal To, Less Than, or Not Equal.</i>
Compared To, Compare Value 1, Compare Value 2, and Right Field Number	Select what the left field number is compared to: <i>Field, Table, or Value.</i> Depending on what you select, the system makes either the Right Field Number or Compare Value 1 and Compare Value 2 fields available for you to enter the appropriate values. Values may be alphanumeric. To indicate an unspecified numeric value, enter #. You only need to enter a value in the Compare Value 2 field if the comparison code is <i>Between.</i> For example, consider CPDF Edit 700.12.3. If pay plan is VN, then step or rate must be between 0 and 28 or asterisks.

The following table shows how you would set up Edit 560.02.2. If Nature of Action Code is 741, then Prior Pay Rate Determinant must be A, B, E, F, M, U, V, or asterisks.

If/Then Code	Sequence Nbr	Left Field Number	Comparison Code	Compared to	Right Field Nbr	Compare Value 1	Compare Value 2
If	1	56 Nature of Action Code	Equal to	Value		741	0
Then	1	71 Prior Pay Rate Determinant	Between	Value		A	B
Then	2	71 Prior Pay Rate Determinant	Between	Value		E	F
Then	3	71 Prior Pay Rate Determinant	Equal to	Value		M	0
Then	4	71 Prior Pay Rate Determinant	Between	Value		U	V
Then	5	71 Prior Pay Rate Determinant	Equal to	Value		**	0

Entering Edit Details

Access the OPM CPDF Maint Details page.



The screenshot shows a web application window titled "OPM CPDF Maint Details Page". Inside the window, there is a section titled "OPM CPDF Maintenance Details". This section contains three input fields: "Update/Change Number:" followed by a text box, "PeopleSoft Edit Location:" followed by a dropdown menu currently set to "Dynamic", and "Comment:" followed by a large, empty text area with a vertical scrollbar on the right side.

OPM CPDF Maint Details

- | | |
|---------------------------------|--|
| Update/Change Number | Indicates the changes received from the CPDF Edit Manual Updates. For example, if you want to change 8 to CPDF Edit Manual Update 13 then enter it as 13.08. |
| PeopleSoft Edit Location | Choose the location that the edit is performed. Options are:
<i>COBOL, Dynamic, PeopleCode, Prompt Tbl, Shared Pgm, Status, and Table Edit.</i> |

Processing CPDF Files

This section provides an overview of CPDF reporting requirements and discusses how to:

- Identify CPDF codes.
- Produce the CPDF files.
- Process CPDF edits.
- Process the CPDF Dynamic table.
- Process the CPDF Dynamic/Status file.
- Process the CPDF Organizational Component table file.
- Process the CPDF Status table.
- Update CPDF edits.

Understanding CPDF Reporting Requirements

Most agencies in the executive branch of the U.S. federal government—and selected agencies in the legislative branch—participate in the Central Personnel Data File (CPDF). CPDF edits provide the Office of Personnel Management (OPM) with the means to standardize federal government personnel data, monitor quality of data provided by federal government agencies, and produce a series of government-wide reports.

Because you must comply with government requirements when filing CPDF reports, PeopleSoft Human Resources contains reports with appropriate information in the standard federal reporting format.

The edit submissions are:

- CPDF Status submission.

This submission includes a single record for each active employee. It shows the current status of each employee as of the end date of the submission period. The OPM requires a quarterly status file submission in March, June, September, and December.

- CPDF Dynamic submission.

This submission consists of all personnel actions processed by the PeopleSoft system during the reporting period. The normal reporting period is the calendar month; however, the period may end as of the last full pay period of the month. Actions that are more than two years past the current effective date or more than six months ahead of the current effective date aren't reported.

- Organizational Component Translations (OCT) submission.

This submission consists of the organizational segments of the agency. The OPM requires that an agency submit this file semi-annually in March and September.

When executing the CPDF error processing, the system uses the CPDF edit processing rules as mandated by the OPM. Then, in the CPDF edit processing, it identifies the fields and records that don't meet the OPM's quality standards.

Note. For administering CPDF edits, understanding how they apply to your agency, and running the related reports, this discussion assumes that you are familiar with the *Federal Workforce Reporting Systems Operating Manual* and have a working knowledge of the CPDF edits and processes.

See Also

U.S. Federal Government, *Federal Workforce Reporting Systems Operating Manual*

Pages Used to Process CPDF Files

Page Name	Object Name	Navigation	Usage
CPDF Edits Processing (Central Personnel Data File edits processing)	RUNCTL_FGCPDF	Workforce Monitoring, Meet Regulatory Rqmts, CPDF Processing USF, Edit Validation, CPDF Edits Processing	Generate a table of the CPDF edit errors found with the CPDF Status and Dynamic tables.
CPDF Dynamic Table (Central Personnel Data File dynamic table)	RUNCTL_FGHR019A	Workforce Monitoring, Meet Regulatory Rqmts, CPDF Processing USF, Dynamic Table, CPDF Dynamic Table	Generates the Dynamic table of employee information used to create the Dynamic Report File.
CPDF Dynamic/Status File Generation (Central Personnel Data File dynamic/status file generation)	RUNCTL_FGHR019C	Workforce Monitoring, Meet Regulatory Rqmts, CPDF Processing USF, Dynamic/Status File, CPDF Dynamic/Status File Generation	Generate the Dynamic file, Status file or both, or the Status file for submission to the OPM.
CPDF Org. Comp. File (Central Personnel Data File organizational component file)	RUNCTL_FGHR019D	Workforce Monitoring, Meet Regulatory Rqmts, CPDF Processing USF, Organizational Component File, CPDF Org. Comp. File	Report on codes, titles, and hierarchical relationships for organizations within an agency as of the end of the reporting period.
CPDF Status Table (Central Personnel Data File status table)	RUNCTL_FGHR019E	Workforce Monitoring, Meet Regulatory Rqmts, CPDF Processing USF, Status Table, CPDF Status Table	Produce a file that shows the number of records that are processed and written to the Status table.
Run CPDF Error Report (run Central Personnel Data File error report)	RUNCTL_FGHR019B	Workforce Monitoring, Meet Regulatory Rqmts, CPDF Processing USF, Error Report, Run CPDF Error Report	Run the CPDF Error report (FGHR019B). This report lists the CPDF edit errors found in CPDF error processing.

Identifying CPDF Codes

Before you use CPDF reporting, set up CPDF codes. The following table shows what this information is and where you enter it in the system.

Data	Page
Indicate if earnings are reported to the CPDF.	Earnings Table 1
Indicate the CPDF earnings type to identify retention allowance, supervisory differential, or staffing differential code types.	Earnings Table 1
Indicate whether the subagency is a CPDF reporter.	Sub-Agency Table

Producing the CPDF Files

To produce the CPDF files:

1. Generate the CPDF Dynamic table (monthly) *or* generate the CPDF Status table (quarterly).
2. Perform CPDF edits processing to execute the COBOL program FGPCDFF.
3. Produce the CPDF Error report.

Review and clean up the data errors identified in the Error report. Repeat the processes in steps 1-3 until the data satisfactorily meets your organizational reporting standards.

4. Generate the CPDF Dynamic/Status file.
5. Generate the CPDF Organizational Component Translate submission.

Note. Processing CPDF edits deletes any existing data in the CPDF Error table before adding any new records. If you need to save an existing CPDF Error table data, back up the table before running this process.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” (USF) Meet Regulatory Requirements Reports for the US Federal Government

Processing CPDF Edits

Access the CPDF Edits Processing page.



CPDF Edits Processing

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

Validate CPDF Data

☒ **Validate CPDF Status Data**

☐ **Validate CPDF Dynamic Data**

CPDF Edits Processing page

Validate CPDF Data Select Status or Dynamic to create the respective files.

Run Click this button to process CPDF Edits.

Processing the CPDF Dynamic Table

Access the CPDF Dynamic Table page.

CPDF Dynamic Table page

Generating the CPDF Dynamic table enables you to run the CPDF Edits process against the table and generate the CPDF dynamic submission. You must generate the CPDF Dynamic table in order to continue processing the CPDF dynamic edits.

Note. The process deletes any existing data in the CPDF Dynamic table before adding any new records. To save existing CPDF Dynamic table data, you must back up the table before running this process.

As Of Date	Select to define the transactions selected by the CPDF Dynamic Table process. The process selects all transactions with an effective date two years before and six months after the as of date.
Start Date	Enter the starting date when the program should select personnel actions that were last worked on or modified. This field is based on the tracking date from the personnel action.
End Date	Enter the ending date when the program should select personnel actions that were last worked on or modified. This field is based on the tracking date from the personnel action.
Work-in-Progress Status	Select any work-in-progress (WIP) status for reporting on the CPDF Dynamic table. For a CPDF submission, select either <i>Completed</i> or <i>Corrected</i> .

Processing the CPDF Dynamic/Status File

Access the CPDF File Generation page.

CPDF File Generation page

CPDF Dynamic/Status File Generation process builds the CPDF status and dynamic submissions. The process generates these flat files from the CPDF Status table and CPDF Dynamic table, respectively. If the process finds that field defaults are necessary, it uses the CPDF field default table to supply the values.

You must have already entered agency parameters before using this page.

CPDF Dynamic File and CPDF Status File Select one or both of these fields to generate the correct submission file.

Processing the CPDF Organizational Component Translation Submission

Access the CPDF Org. Comp. File page.

CPDF Org. Comp. File page

The CPDF Organizational Component Translation submission (OCT) consists of codes, titles, and hierarchical relationships for organizations within an agency as of the end of the reporting period. The OCT is reported twice a year, in March and September, and must match the organizational component codes utilized in the employee records in status submissions for the agency.

You must have already set up agency and language parameters before using this page.

As Of Date Select so that the file contains organizational components that are effective for a given date.

Processing the CPDF Status Table

Access the CPDF Status Table page.

CPDF Status Table page

You must first generate the CPDF Status table in order to perform the CPDF status edits processing. Generation of the CPDF Status table enables you to run the CPDF edits process against the table and create the CPDF status submission.

Note. This process deletes any existing data in the CPDF Status table before adding any new records. If your organization finds it necessary to retain and save existing CPDF Status table data, you must back up the table before running this process.

As Of Date Select to restrict your selection to those employees active on that date.

Updating CPDF Edits

When you receive OPM updates to the CPDF edit manual, you must maintain the edits in your system.

Submitting Parent Locator Information

Government agencies are required by law to send a biweekly and quarterly file containing data on new hires to the Federal Parent Locator Service, a part of the Social Security Administration. The Federal Parent Locator Service uses the data to track and enforce child support payments.

To submit parent locator information:

1. Create an interface file using the New Hire Reporting run control page.
2. Send the file to the Social Security Administration.
You will receive that file back from the Social Security Administration.
3. Process the file received from the Social Security Administration using the New Hire Error Reporting run control page.

The report created by this process lists errors that were sent previously so that they can be corrected for the next time you send the file.

At any point in the process, you can use the New Hire Reporting Stats inquiry page to view statistics about the new hire data exports.

Page Used to View New Hire Data Export Statistics

Page Name	Object Name	Navigation	Usage
New Hire Control	GVT_NH_CONTROL	Workforce Monitoring, Meet Regulatory Rqmts, Review New Hire Stats USF, New Hire Control	Display statistical information about new hire data exports generated by the New Hire Reporting report.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” Meet Regulatory Requirements Reports

Running Equal Employment Opportunities Reports

This section discusses how to run the EEO reports that are for U.S. federal government users only.

See Also

Chapter 8, “(USA) Meeting Regulatory Requirements for the United States,” Setting Up EEO Reporting Requirements, page 113

Pages Used to Run the EEO Reports

Page Name	Object Name	Navigation	Usage
EEO Groups by PATCOB/POI	RUNCTL_FGHR012	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO Groups by PATCOB/POI USF, EEO Groups by PATCOB/POI	Run the EEO Groups by PATCOB/POI report (FGHR012A) which details the distribution of EEO groups and comparison by PATCOB and POI.
EEO Groups by PATCOB/SubAgency	RUNCTL_FGHR012	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO Grps by PATCOB/SubAgcy USF, EEO Groups by PATCOB/SubAgency	Run the EEO Groups by PATCOB/SubAgency report (FGHR012B) to see the distribution of EEO groups and comparison by PATCOB and sub-agency.
EEO Groups by Series/POI	RUNCTL_FGHR014	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO Groups by Series/POI USF, EEO Groups by Series/POI	Use this page to run the EEO Groups by Series/POI report (FGHR014A). This report details the distribution of EEO groups and comparison by occupation and POI.
EEO Groups by Series/SubAgency	RUNCTL_FGHR014	Workforce Monitoring, Meet Regulatory Rqmts, EEO Reports, EEO Grps by Series/SubAgcy USF, EEO Groups by Series/SubAgency	Use this page to run the EEO Groups by Series/SubAgency report (FGHR014B) which details the distribution of EEO groups and comparison by series and sub-agency.

Running VETS Reports

This section discusses how to run the VETS reports that are for U.S. Federal Government users only.

See Also

[Chapter 8, “\(USA\) Meeting Regulatory Requirements for the United States,” Meeting VETS-100 Reporting Requirements, page 115](#)

Page Used to Run the VETS Reports

Page Name	Object Name	Navigation	Usage
VETS-100 by POI	RUNCTL_FGHR013	Workforce Monitoring, Meet Regulatory Rqmts, VETS—100 Reports, VETS-100 by POI USF	Use this page to run the VETS-100 by POI report (FGHR013B), which generates a veterans employment report by POI.
VETS-100 by SubAgency	RUNCTL_FGHR013	Workforce Monitoring, Meet Regulatory Rqmts, VETS—100 Reports, VETS-100 by Sub Agency	Use this page to run the VETS-100 by SubAgency report (FGHR013A), which generates a veterans employment report by sub-agency.

Running SF113–A and SF113–G Reports

This section provides pages used to run the SF113–A and SF113–G reports and discusses how to run the SF113–G report.

Pages Used to Run the SF113–A and SF113–G Reports

Page Name	Object Name	Navigation	Usage
SF113-A Report	RUN_FGSF113A	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, SF113-A USF, SF113-A Report	Run the SF113-A report (FGSF113A), which generates a monthly report of federal civilian employment.
SF113-G Report	RUN_FGSF113G	Workforce Monitoring, Meet Regulatory Rqmts, Regulatory Reports, SF113-G USF, SF113-G Report	Run the SF113-G report (FGSF113G), which generates a monthly report of full-time equivalent and work-year civilian employment.

Running the SF113–G Report

Access the SF113–G Report page.

SF113-G Report

User ID: PS

Report List

Process Monitor

Process Request

Run Control ID: 1

SF-113G Control Information

Company: DC Department of Communications

From Date:

Report Period Thru Date:

Fiscal Year From Date:

Fiscal Year Thru Date:

SF-113G Authorized Ceiling:

SF113–G Report page

SF-113G Authorized Ceiling

If you enter a value here, it is included in the Ceiling column of the report. This field is optional but recommend if you want to report that employee on the SF-113G report.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” (USF) Meet Regulatory Requirements Reports for the US Federal Government

CHAPTER 10

(GBR) (USA) (USF) Meeting Disability Regulatory Requirements

This chapter provides overviews of Disability and Discrimination Act regulatory requirements in the U.K. and Americans with Disability Act (ADA) regulatory requirements in the U.S. and discusses how to manage accommodation data.

(GBR) Understanding Disability and Discrimination Act Regulatory Requirements in the U.K.

The Disability and Discrimination Act of 1995 makes it unlawful for any U.K. employer to discriminate against individuals based on their disability in relation to recruitment, promotion, training, benefits, terms and conditions of employment, and dismissal. It requires companies of 20 or more workers to hire a certain percentage of disabled persons.

In addition, employers are required to make reasonable adjustments and accommodations for the disabled worker such as adjustments to the premises, altering working hours, allocating duties to another person, and acquiring or modifying equipment.

Use the Accommodation Data component in Report Regulations (UK) to track and document your company's efforts to make accommodations for disabled employees.

Prerequisites

Before using this component, set up codes in the following tables:

- Accommodation Type table.
- Diagnosis table.
- Job Task table.
- Job Code Task table.

Disability Accommodations Tracking

You use three pages—the Accommodation Request page, the Accommodation Option page, and the Accommodation Job Task page—to track data showing that your company has no discriminatory practices against people with disabilities. When employees or applicants request that you make accommodations that enable them to perform job tasks, you can track the steps that bring those requests to resolution.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook

(USA) (USF) Understanding ADA Regulatory Requirements in the U.S.

Title I of the ADA prohibits employers with U.S. operations from discriminating against job applicants or employees with disabilities. Discrimination is forbidden in job applications, testing, hiring, assignments, evaluations, disciplinary actions, promotions, compensation, leave and benefits, and other employee concerns. But the ADA doesn't include any specific reporting requirements. This makes it difficult to prove that your company doesn't discriminate against people with disabilities.

Prerequisites

Before you track accommodation requests made by employees and applicants, set up data in the Accommodation Type table, the Job Task table, the Job Code Task table, and the Diagnosis table.

Once you create accommodation types and essential job functions, linked job functions with job codes, and created diagnosis codes, use the Accommodation Data component to track requests that employees and applicants make for disability accommodations. Complete the pages in the order that they appear in the following section.

Managing Accommodation Data

This section discusses how to:

- Enter accommodation requests.
- Enter accommodation options.
- Enter accommodated job tasks.

Pages Used to Manage Accommodation Data

Page Name	Object Name	Navigation	Usage
Accommodation Request	ACCOMM_REQUEST	Workforce Monitoring, Meet Regulatory Rqmts, Maintain Accommodation Data, Accommodation Request	Enter accommodation requests that an employee or applicant makes of your organization. You can also enter diagnosis codes for employee disabilities.
Accommodation Option	ACCOMM_OPTION	Workforce Monitoring, Meet Regulatory Rqmts, Maintain Accommodation Data, Accommodation Option	Enter the options that the organization or the person with a disability is considering in order to resolve each accommodation request.
Accommodation Job Task	ACCOMM_JOB_TASK	Workforce Monitoring, Meet Regulatory Rqmts, Maintain Accommodation Data, Accommodation Job Task	Enter the job tasks that you are accommodating, classified by job code and (if necessary) by location. If you create essential job tasks in the Job Code Task table, you can enter multiple job tasks for each accommodation.
Accommodation Type Table	ACCOM_TYPE_TABLE	Workforce Monitoring, Meet Regulatory Rqmts, Define Regulatory Rqmts Data, Accommodation Types, Accommodation Type Table	Identify the types of accommodations that your organization can make for employees or applicants with disabilities.

Entering Accommodation Requests

Access the Accommodation Request page.

Accommodation Request page

To enter accommodation requests for an employee or applicant with a disability, select Workforce Monitoring, Meet Regulatory Reqmts, Maintain Accommodation Data. The system prompts you for an employee ID.

The system displays the business unit, department, job code, and location code associated with the employee on the Job Data pages.

Accommodation ID	Displays a system-generated sequential number, which you can override.
Date of Request	Enter the date of request for the accommodation.
Comment	Enter comments applicable to the request.
Responsible ID	Select the employee responsible ID.
Request Status Date	Enter the request status date.
Regulatory Region	Select from the list of Regulatory Region page prompt values.
Diagnosis Codes	Select any that apply. You create diagnosis codes in the Diagnosis table.

Entering Accommodation Options

Access the Accommodation Option page.

Accommodation Option page

The system displays the accommodation ID, date of request, business unit, department, job code, and location code.

Option ID

Displays a system-generated sequential number for the option ID, which you can override.

Click the Insert Row button so that you can add new data rows to enter more accommodation options or alternatives .

Employer Suggested Option

Select to indicate whether the information that you enter is an option that the employer suggested.

Type

Select an accommodation type, which you define in the Accommodation Type Table page.

Currency Code

Select a currency code if you are tracking the costs of this accommodation option in a different currency. Values are located in the Currency Code page.

If you did not define multiple currencies in the Installation table, the Currency Code field doesn't appear.

Cost

Enter the estimated cost of the option.

Accommodation Status

Select the status from the list of values.

Entering Accommodated Job Tasks

Access the Accommodation Job Task page.

Accommodation Request		Accommodation Option		Accommodation Job Task	
Niles, William		Employee		EmplID: PU018	
Job Details Find View All First ◀ 1 of 1 ▶ Last					
Accommodation ID:	1	Date of Request:	11/06/2002	+ -	
Business Unit:	EGUBU	E&G University			
Department:	90310	Electrical Engineering			
Job Code:	720000	Professor			
Location Code:	PACSU	Accord State University, Campus			
Job Task Accommodated Find View All First ◀ 1 of 1 ▶ Last					
Business Unit:	EGUBU	E&G University			
Job Code	720000	Professor			
Location					
Job Task					

Accommodation Job Task page

Job Task Accommodated

Business Unit Select from the Business Unit - Business Unit page list of prompt values.

Job Code Select a job code that you are accommodating. Create these codes in the Job Code Table - Job Code Profile page.

Location and Job Task Select a location and job task for the request that you are accommodating. You create these codes in the Location Table - Location Address page and the Job Task Table page.

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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