

PeopleSoft®

PeopleSoft 8.8
Human Resources PeopleBook:
Administer Salary Packaging

December 2002

PeopleSoft 8.8
Human Resources PeopleBook:
Administer Salary Packaging
SKU HRMS88HSP-B 1202

PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.
Copyright 1988-2002 PeopleSoft, Inc. All rights reserved.

Printed in the United States.

All material contained in this documentation is proprietary and confidential to PeopleSoft, Inc. ("PeopleSoft"), protected by copyright laws and subject to the nondisclosure provisions of the applicable PeopleSoft agreement. No part of this documentation may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, including, but not limited to, electronic, graphic, mechanical, photocopying, recording, or otherwise without the prior written permission of PeopleSoft.

This documentation is subject to change without notice, and PeopleSoft does not warrant that the material contained in this documentation is free of errors. Any errors found in this document should be reported to PeopleSoft in writing.

The copyrighted software that accompanies this document is licensed for use only in strict accordance with the applicable license agreement which should be read carefully as it governs the terms of use of the software and this document, including the disclosure thereof.

PeopleSoft, PeopleTools, PS/nVision, PeopleCode, PeopleBooks, PeopleTalk, and Vantive are registered trademarks, and Pure Internet Architecture, Intelligent Context Manager, and The Real-Time Enterprise are trademarks of PeopleSoft, Inc. All other company and product names may be trademarks of their respective owners. The information contained herein is subject to change without notice.

Open Source Disclosure

This product includes software developed by the Apache Software Foundation (<http://www.apache.org/>). Copyright (c) 1999-2000 The Apache Software Foundation. All rights reserved. THIS SOFTWARE IS PROVIDED "AS IS" AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE APACHE SOFTWARE FOUNDATION OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

PeopleSoft takes no responsibility for its use or distribution of any open source or shareware software or documentation and disclaims any and all liability or damages resulting from use of said software or documentation.

Contents

General Preface

- About This PeopleBookvii**
- PeopleSoft Application Prerequisites.....vii
- PeopleSoft Application Fundamentals.....vii
- Related Documentation.....viii
 - Obtaining Documentation Updates.....viii
 - Ordering Printed Documentation.....viii
- Typographical Conventions and Visual Cues.....ix
 - Typographical Conventions.....ix
 - Visual Cues.....x
- Comments and Suggestions.....xi
- Common Elements in These PeopleBooks.....xi

Preface

- PeopleSoft Human Resources: Administer Salary Packaging Preface.....xiii**
- PeopleSoft Application Fundamentals.....xiii
- PeopleBook Structure.....xiii

Chapter 1

- Getting Started With PeopleSoft Human Resources Administer Salary Packaging for Australia.....1**
- Administer Salary Packaging Business Processes.....1
- PeopleSoft Human Resources: Administer Salary Packaging for Australia Implementation.....1
 - Setting Up PeopleSoft HRMS Fundamental Tables.....2
 - Setting Up PeopleSoft Global Payroll Core Application Tables.....2
 - Setting Up Core PeopleSoft Human Resources: Salary Packaging Tables.....2
 - Setting Up Additional PeopleSoft Human Resources: Administer Salary Packaging Tables.....4

Chapter 2

- Understanding PeopleSoft Human Resources: Administer Salary Packaging.....5**
- PeopleSoft Human Resources: Administer Salary Packaging.....5
- PeopleSoft Human Resources: Administer Salary Packaging Business Processes.....5
- PeopleSoft Human Resources: Administer Salary Packaging Integrations.....6

Designing Your Salary Packaging Program.....8
 Setting Up Support Tables and Salary Packages.....8

Chapter 3

Setting Up Salary Packaging.....13
 Understanding Salary Packaging Set Up.....13
 Setting Up Salary Packaging Payroll Components.....15
 Pages Used to Set Up Salary Packaging Payroll Components.....16
 Setting Up Salary Packaging Business Expense Codes.....16
 Setting Up Salary Packaging Compensation Rate Codes.....17
 Defining Calendars for Salary Packaged Employees.....17
 Setting Up Salary Packaged Earnings and Deductions.....18
 Defining Non-Salary Packaged Earnings and Deductions Elements.....18
 Setting Up and Viewing Salary Packaging Tax Options.....19
 Pages Used to Define and View Salary Packaging Tax Options.....20
 Viewing Salary Packaging FBT and GST Tax Details.....20
 Viewing Salary Packaging FBT Statutory Interest Rates.....21
 Reviewing Salary Packaging FBT Motor Vehicle Statutory Percentage Information.....22
 Setting Up Salary Packaging Company Payroll Tax Options.....23
 Maintaining Tax Scales Used in Salary Package Calculations.....25
 Setting Up Additional Salary Package Components.....26
 Pages Used to Define Additional Salary Package Components.....26
 Defining Salary Package Component Liabilities.....26
 Setting Up Salary Package Components.....28
 Pages Used to Set Up Salary Package Components.....29
 Setting Up Base Salary Package Components.....29
 Linking Salary Packaging Additional Components With Components.....31
 Defining Contributing Salary Package Components.....32
 Defining Expense Details for Salary Packaged Components.....34
 Setting Up Salary Package Templates.....36
 Pages Used to Set Up Salary Package Templates.....36
 Defining Salary Package Templates.....36
 Setting Up Salary Package Rules.....37
 Pages Used to Set Up Salary Package Rules.....37
 Creating Salary Package Rules.....37
 Setting Up Salary Packaging Defaults.....39
 Setting Up Your Organisation’s TPV and TEC Compensation Rate Codes.....39
 Setting Up Default Package Templates and Rules for Jobs and Positions.....40
 Setting Up Default Salary Packaging Pay Frequencies.....40

Chapter 4

Modelling Salary Packages.....41

Understanding Salary Package Modelling.....41

 Common Elements Used in This Chapter.....41

Modelling Salary Packages for Employees.....42

 Pages Used to Model Salary Packages for Employees.....43

 Defining Employee Salary Package Details.....43

 Setting Up Annual Base Components for Employees.....46

 Entering Package Component Details.....49

 Entering Salary Package Component Budget Details for Employees.....52

 Viewing Annual Additional Salary Package Components for Employees.....53

 Setting Up Period Base Components for Employees.....55

 Viewing Additional Period Components for Employees.....56

 Viewing Package Component PAYG Tax Liabilities for Employees.....56

Modelling Salary Packages for Applicants.....57

 Pages Used to Model Salary Packages for Applicants.....59

 Understanding How Applicant Package Modelling Fits into Recruitment.....59

 Defining Applicant Salary Packages.....60

 Setting Up Annual Base Components for Applicants.....61

 Entering Package Component Budget Details for Applicants.....61

 Viewing Annual Additional Salary Package Components for Applicants.....61

 Setting Up Period Base Components for Applicants.....62

 Viewing Period Additional Salary Package Components for Applicants.....62

 Viewing Package Component PAYG Tax Liabilities for Applicants.....62

Copying Applicant Salary Packages to the Employee Salary Package Component.....62

 Pages Used to Copy Applicant Salary Packages to the Employee Salary Package Component.....63

Chapter 5

Managing Salary Packages.....65

Understanding Managing Salary Packages.....65

 Common Elements Used in This Chapter.....65

Confirming Salary Packages.....66

 Confirming Salary Packages for Applicants on Hire.....66

Enrolling Salary Packages.....67

 Pages Used to Enrol Salary Packages.....67

 Initiating Salary Package Enrolment.....67

Reviewing Salary Packages.....69

 Identifying Salary Packages Due for Review.....69

 Remodelling the Employee's Salary Package.....69

De-enrolling Employees from Salary Packages.....71
 Initiating Salary Package De-enrolment.....71
Making Effective-Dated Changes to Confirmed Salary Packages.....72
 Changing Existing Packages and Model New Packages.....73
 Working With Budgets and the Carry Forward Amounts.....73
Running Salary Packaging Reports.....75
 Pages Used To Run The Salary Packaging Reports.....75

Glossary of PeopleSoft Terms.....77

Index89

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>0</i> , not the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
Monospace font	Indicates a PeopleCode program or other code example.
(quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

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

Common Elements in These PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Once, Always, and Don't Run	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run . Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.

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

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft Human Resources: Administer Salary Packaging Preface

This preface discusses:

- PeopleSoft Application Fundamentals.
- PeopleBook structure.
- Common elements used in this PeopleBook.

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 application.

PeopleSoft Application Fundamentals

The *PeopleSoft Human Resources PeopleBook: Administer Salary Packaging* provides you with implementation and processing information for your PeopleSoft Human Resources: Administer Salary Packaging 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 applications 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 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	<p>This is the chapter you're reading now. It explains:</p> <ul style="list-style-type: none"> • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements that are used in the PeopleBook. For example, if a data field is used on multiple pages, it might be defined only once in this chapter rather than repeatedly throughout the book.
Getting Started With...	<p>This chapter discusses application implementation guidelines. It explains:</p> <ul style="list-style-type: none"> • The business processes documented within the book. • Integrations between the application and other applications. • 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...	<p>This is an introductory chapter that broadly explains the application and the functionality within the application.</p>
Setup and Implementation	<p>This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the application. For example, if functionality X is part of a application, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality.</p> <p>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.</p>

Chapters	Description
Business Process	<p>This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of an application, 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.</p> <p>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.</p>
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 application's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

CHAPTER 1

Getting Started With PeopleSoft Human Resources Administer Salary Packaging for Australia

This section provides an overview of PeopleSoft Human Resources: Administer Salary Packaging business processes and discusses PeopleSoft Human Resources: Administer Salary Packaging implementation tasks.

Administer Salary Packaging Business Processes

Listed below are the processes for PeopleSoft Human Resources: Administer Salary Packaging:

- Modeling salary packages for employees.
- Modeling salary packages for applicants.
- Reviewing salary packages.
- Enrolling in salary packages.

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

PeopleSoft Human Resources: Administer Salary Packaging for Australia Implementation

The Administer Salary Packaging table-loading implementation includes setting up the following:

- PeopleSoft HRMS fundamental tables.
- PeopleSoft Global Payroll for Australia core tables.
- Administer Salary Packaging application tables.

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

Note. The order in which you set up tables required to implement PeopleSoft Human Resources: Administer Salary Packaging may vary; each individual application isn't necessarily set up in sequence. For example, you may set up HRMS tables, then tables for the Administer Salary Packaging core application, then several tables specific to the country or industry you operate in, followed by additional Administer Salary Packaging core tables. In addition, the order in which you set up tables may also depend on the features you want to use. The information provided in this chapter offers a high-level guide of how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.

Setting Up PeopleSoft HRMS Fundamental Tables

The Administer Salary Packaging business process requires the setup of global HRMS tables, common to multiple HRMS applications. The information that you define on these tables lays the foundation for the Administer Salary Packaging setup.

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 PeopleSoft Global Payroll Core Application Tables

Administer Salary Packaging requires the setup of numerous tables in the PeopleSoft Global Payroll core application and the PeopleSoft Global Payroll for Australia application.

Step	Reference
1. Set up PeopleSoft Global Payroll core application tables.	<i>PeopleSoft 8.8 Global Payroll PeopleBook, "Getting Started With PeopleSoft Global Payroll"</i>
2. Set up PeopleSoft Global Payroll for Australia.	<i>PeopleSoft 8.8 Global Payroll for Australia PeopleBook, "Getting Started with PeopleSoft Global Payroll for Australia"</i>

Setting Up Core PeopleSoft Human Resources: Salary Packaging Tables

The steps discussed in this section suggest an order in which you define the information in your Salary Packaging tables. The fundamental tables you set up in PeopleSoft Human Resources and PeopleSoft Global Payroll for Australia lays the foundation for the steps listed here.

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

- Modeling salary packages for employees.
- Reviewing salary packages.
- Enrolling in salary packages.

Step	Reference
1. Establish payroll cycles	Chapter 3, “Setting Up Salary Packaging.” Setting Up Salary Packaging Payroll Components, page 15
2. Define salary packaging payroll components.	Chapter 3, “Setting Up Salary Packaging.” Setting Up Salary Packaging Payroll Components, page 15
3. Define salary packaging tax options.	Chapter 3, “Setting Up Salary Packaging.” Setting Up and Viewing Salary Packaging Tax Options, page 19
4. Define additional compensation components.	Chapter 3, “Setting Up Salary Packaging.” Setting Up Additional Salary Package Components, page 26
5. Define salary package components.	Chapter 3, “Setting Up Salary Packaging.” Setting Up Salary Package Components, page 28
6. Set up salary package templates.	Chapter 3, “Setting Up Salary Packaging.” Setting Up Salary Package Templates, page 36
7. Set up salary package rules.	Chapter 3, “Setting Up Salary Packaging.” Setting Up Salary Package Rules, page 37
8. Define salary package defaults.	Chapter 3, “Setting Up Salary Packaging.” Setting Up Salary Packaging Defaults, page 39
9. Establish the salary package and specify options that drive the calculation of package values for modeling purposes.	Chapter 4, “Modelling Salary Packages.” Modelling Salary Packages for Employees, page 42
10. Enter base component details that drive package value calculations on an annual basis. Components, effective for only part of the year, have a full year equivalent amount that appears on this page.	Chapter 4, “Modelling Salary Packages.” Modelling Salary Packages for Employees, page 42
11. View the additional component values (expressed as an annual value) associated with the Base Components page. For each component, view the associated additional components as well as component totals.	Chapter 4, “Modelling Salary Packages.” Modelling Salary Packages for Employees, page 42
12. Enter base component details that drive package value calculations on an annual basis. Components, effective for only part of the year, have a prorated amount that appears on this page.	Chapter 4, “Modelling Salary Packages.” Modelling Salary Packages for Employees, page 42
13. View the additional component values (expressed as part year values, depending on the start and end dates of the components) associated with the Base Comp (Per) page.	Chapter 4, “Modelling Salary Packages.” Modelling Salary Packages for Employees, page 42
14. View the impact to the employee’s salary and tax obligations based on the package model.	Chapter 4, “Modelling Salary Packages.” Modelling Salary Packages for Employees, page 42
15. Set up a budget for the planned expenditure of a component.	Chapter 4, “Modelling Salary Packages.” Modelling Salary Packages for Employees, page 42

Setting Up Additional PeopleSoft Human Resources: Administer Salary Packaging Tables

These steps define information in additional PeopleSoft Human Resources: Salary Packaging tables. The information that you define in your core tables lays the foundation for this Administer Salary Packaging-specific set up.

Setting up these additional tables prepares your system to support the modeling salary packages for applicants business process.

Step	Reference
1. Record applicant salary packages.	Chapter 4, “Modelling Salary Packages,” Modelling Salary Packages for Applicants, page 57
2. Enter base component details that drive package value calculations on an annual basis for applicants.	Chapter 4, “Modelling Salary Packages,” Modelling Salary Packages for Employees, page 42
3. View the additional component values (for applicants) (expressed as an annual value) associated with the prior page.	Chapter 4, “Modelling Salary Packages,” Modelling Salary Packages for Employees, page 42
4. Enter base component details (for applicants) that drive package value calculations on a prorated basis—in other words, the actual value of the component for the period for which it is effective.	Chapter 4, “Modelling Salary Packages,” Modelling Salary Packages for Employees, page 42
5. View the additional component values for applicants (expressed as part year values, depending on the start and end dates of the components) associated with the prior page.	Chapter 4, “Modelling Salary Packages,” Modelling Salary Packages for Employees, page 42
6. View the impact to the applicant’s salary and tax obligations based on the package model.	Chapter 4, “Modelling Salary Packages,” Modelling Salary Packages for Employees, page 42
7. Set up a budget for the planned expenditure of a component for applicants. Accessed by clicking the Bud button on the Base Components page.	Chapter 4, “Modelling Salary Packages,” Modelling Salary Packages for Employees, page 42
8. Copy applicant salary packages over to the Employee Salary Package component.	Chapter 4, “Modelling Salary Packages,” Copying Applicant Salary Packages to the Employee Salary Package Component, page 62

CHAPTER 2

Understanding PeopleSoft Human Resources: Administer Salary Packaging

This section provides an overview of PeopleSoft Human Resources: Administer Salary Packaging and discusses:

- Supported business processes.
- Human Resources: Administer Salary Packaging integrations.
- Designing your Salary Packaging system .

PeopleSoft Human Resources: Administer Salary Packaging

PeopleSoft Human Resources: Administer Salary Packaging relies on information you define in PeopleSoft Global Payroll and PeopleSoft Human Resources to ensure accurate payroll processing and to facilitate package expenditure monitoring. When setting up salary packaging, you can identify the different forms of remuneration and define the components you use in your salary packages. You can also set up the calendars you use to process your salary-packaged employees. Salary Packaging tables enable you to set up components, additional components, package rules and package templates. You define the components that employees can include in their remuneration packages, as well as the tax liabilities on those components.

You can also define the rules associated with components and then group components into templates. Salary package modelling then enables you to explore different package scenarios by combining any number or type of components to find satisfactory solutions and alternatives for employee salary packages. After you confirm the employee's selected package and run the package enrolment process, the system enrolls the rate codes onto the Compensation page of the employee's job record. This step establishes the employee's entitlements for processing through payroll.

PeopleSoft Human Resources: Administer Salary Packaging Business Processes

PeopleSoft Human Resources supports the following business processes:

- Modeling Salary Packages for Employees.

Salary package modeling enables you to explore different package scenarios to find satisfactory solutions and alternatives for employee salary packages. You can save and report on any number of package variations during the modelling process.

- Modeling Salary Packages for Applicants.

If you have been tracking and administering job applicants through the Recruit Workforce business process in PeopleSoft Human Resources, you don't have to re-enter all of the information you've already entered in the system when you hire an applicant. After the applicant is hired and you have created the applicant's package, you can copy the applicant's ID over to an employee ID using the Appl to Empl Copy page in the Recruiting menu Recruiting, Hire Applicants, Prepare for Hire, Copy Applicant to Employee AUS and view the package details using the Employee Salary Package pages.

- Reviewing Salary Packages.

Salary packages are generally effective for a year and subsequently subject to annual review. Regardless of the period of the package, it is necessary to review the package near the end of its effective period and establish a new package. Reviewing a package involves:

- Reconciling the expenditure against the package.
- Remodeling where necessary.
- Confirming and enrolling the new package for payment.

- Enrolling in Salary Packages.

The Package Enrolment process creates compensation rates on the Job Data - Compensation page for all employees with a confirmed package Workforce Administration, Job Information, Job Data. This process saves you the administrative overhead of updating each of the employee's records after a package has been confirmed. You can run the package enrolment process for individual employees or for a pay group. Regardless of the selection criteria, enrolments are only completed for confirmed packages with a status of *proposed*. When enrolling employees, the system identifies the relevant payroll information from the component definitions. Each component and additional component has a compensation rate code attached. The system uses this information to enrol employees.

See Also

[Chapter 4, "Modelling Salary Packages," Modelling Salary Packages for Employees, page 42](#)

[Chapter 4, "Modelling Salary Packages," Modelling Salary Packages for Applicants, page 57](#)

[Chapter 5, "Managing Salary Packages," Reviewing Salary Packages, page 69](#)

[Chapter 5, "Managing Salary Packages," Enrolling Salary Packages, page 67](#)

PeopleSoft Human Resources: Administer Salary Packaging Integrations

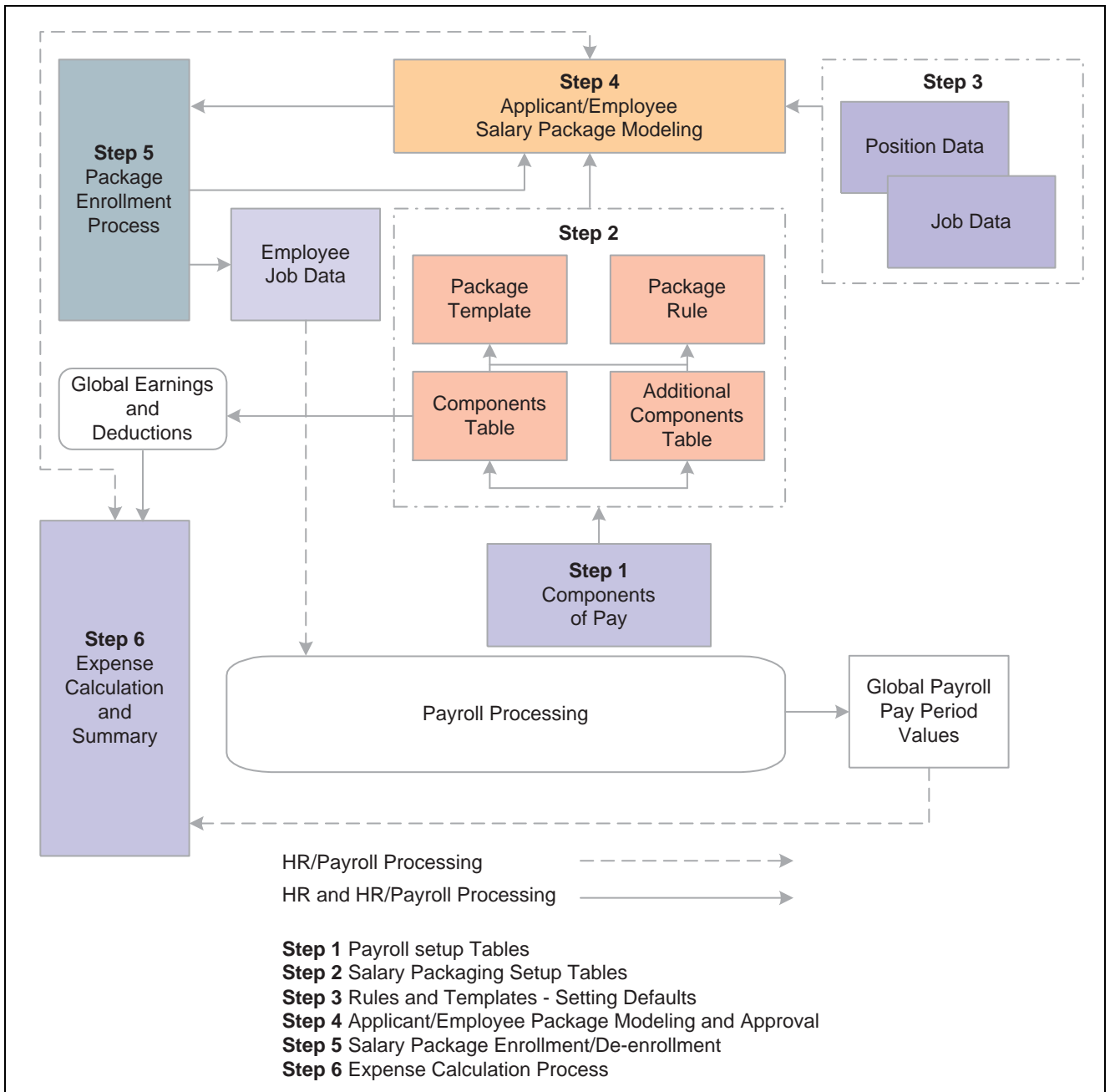
PeopleSoft Human Resources: Administer Salary Packaging integrates with all the PeopleSoft HRMS applications, with other PeopleSoft applications, and with third-party applications. While salary packaging is closely tied to payroll, it is regarded as a human resource function and has many integration points between PeopleSoft Global Payroll for Australia and PeopleSoft Human Resources.

Salary packaging requires base table data definition in two parts:

- General Human Resources and Global Payroll information.

- Salary packaging components and additional components.

The following diagram provides you with an overview of the different processes and tables required by PeopleSoft Human Resources and PeopleSoft Global Payroll as part of the Salary Packaging application:



Salary Packaging, Human Resources, and Payroll integration

The salary packaging integration between PeopleSoft Human Resources and PeopleSoft Global Payroll serves two valuable purposes:

- To facilitate the maintenance of payroll data through the package enrolment process.
- To track expenditure against components in the package expense summary processes.

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

We cover integration considerations in the implementation chapters in this PeopleBook.

Supplemental information about third-party application integrations is located on the PeopleSoft Customer Connection Website.

See Also

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

PeopleSoft Global Payroll PeopleBook

Designing Your Salary Packaging Program

The core of PeopleSoft Human Resources: Administer Salary Packaging comprises six main phases of operation:

1. Set up your PeopleSoft Global Payroll and PeopleSoft Human Resources components.
2. Set up your salary packaging tables.
3. Set up your default rules and templates.
4. Model and approve your applicant/employee packages.
5. Enrol/de-enrol employees into salary packages.
6. Run the expense calculation process (PeopleSoft Global Payroll).

Setting Up Support Tables and Salary Packages

When implementing PeopleSoft Human Resources: Administer Salary Packaging, you set up the following tables. These tables are the building blocks for your salary packages.

Table	Definition
Pay Calendar Table (GP) or Pay Calendar Table (HR only)	Create and schedule payroll cycles for your salary packaged employees in specific pay groups.
Earnings Component (GP)	Define different earnings elements you use to pay your salary packaged employees through PeopleSoft Global Payroll. Used for expense tracking.

Table	Definition
Deductions Component (GP)	Set up the way the system processes deductions, including the priority of the deduction and how the deduction affects taxes. Used for expense tracking.
Comp Rate Code Table - Comp Rate Code Table (HR)	Select the <i>Maintained via Package Only</i> check box in the Australian Salary Packaging group box to define and review your compensation rate codes. Rate codes are attached to salary package components and are enrolled on the employee's Job Data - Compensation page.
Ern/Ded Included (GP)	Select the non-packaged earnings and deductions elements that appear on the Package Summary component after you run the expense calculation process.
Business Expenses (GP)	Enter actuals for salary packaging components defined as an expense payroll type. You must have a unique expense code for each package component to facilitate reconciliation of package expenditure.
Position Data - Description page and Job Code Table - Job Code Profile	Attach the default package rule and template that you use when modelling your packages to a job code or a position. The defaults on the position override the defaults on the job code. To specify a default compensation rate code for TPY and TEC for a specific company to use when modelling applicant/employee packages, use the Company Table - Default Settings page.
FBT/GST Rate Table	View the FBT and GST rates for Australia. The GST percentage and rate for the calculation of Fringe Benefits Tax (FBT) appear.
FBT Stat Interest	View FBT statutory interest rates. The statutory percentage rate used in the calculation of interest payments for depreciation of motor vehicles and low interest loans appear.
FBT Vehicle Rates	Review FBT motor vehicle statutory percentage information. The kilometre thresholds and the corresponding statutory percentages used in determining the taxable value of a motor vehicle appear.
State Payroll Tax	Specify the payroll tax percent rate for all states where employees in a specific company are located. This page provides maintenance functions for the State Payroll Tax tables. These percentages are used in the notional calculation of tax during package modeling.

Table	Definition
Tax Scales	Maintain tax scales used in package calculations. Set up and view the thresholds and the percentage of tax for each threshold. Use if you have PeopleSoft Human Resources only installed.
Additional Comp	Define the liabilities associated with each of your salary packaging components. Determine the level of package remuneration in which to include these liabilities—Total Package Value (TPV) or Total Employment Cost (TEC).
Base Component	Set up basic information about the salary package component.
Additional Comp	Associate additional components with a salary package component.
Calculated Comp	Define contributing components. To assist in the accurate calculation of components dependent on the value of other components, define the calculation starting point and the other components that affect the value on the Expense Data page.
Expense Data	If you are planning on tracking expenditure (the package expense calculation) and you have PeopleSoft Global Payroll installed, specify package component expenses information for each component. Enter the details and identify the payroll types and related data to track expenditures against package components.
Package Template	Define salary package templates. Define a standard collection of components that are automatically defaulted into package model records for employees or applicants.
Package Rule	Create salary package rules. PeopleSoft applies package rules to validate the package models when you save them.

Table	Definition
Company Table - Default Settings	To establish default TEC and TPV compensation rate codes for a specific company to use when modelling employee packages. These companies are then enrolled into compensation containing TEC and TPV amounts.
Pay Groups AUS — previously Additional Info AUS	<p>When you are defining calendars for salary packaged employees, the pay frequency comes from the value you enter in the Pay Frequency field in the Salary Packaging group box.</p> <p>This group box enables you set up default pay frequencies for the pay groups you use as part of Salary Packaging. The frequency you select is also retrieved by the Package Calendar Table page, which enables the budgeting capabilities in the actual salary package because the system needs to know over what type of frequency to divide the component totals.</p>

See Also

Chapter 1, “Getting Started With PeopleSoft Human Resources Administer Salary Packaging for Australia,” page 1

CHAPTER 3

Setting Up Salary Packaging

This section provides an overview of Salary Packaging for Australia and discusses how to set up Salary Packaging:

- Payroll and human resources components.
- Tax options.
- Components.
- Additional components.
- Templates.
- Rules.
- Defaults.

Understanding Salary Packaging Set Up

There are six main steps involved in setting up and managing the Salary Packaging business process for Australia:

To set up and manage Salary Packaging:

1. Set up your PeopleSoft Global Payroll and Human Resources components.

Salary Packaging relies on information defined in PeopleSoft Global Payroll and Human Resources to ensure accurate payroll processing and to facilitate expenditure monitoring. When setting up Salary Packaging, identify the different forms of remuneration and define the components you use in your salary packages. Also set up the calendars you use to process your salary-packaged employees. When implementing Salary Packaging with PeopleSoft Global Payroll, use the following Human Resources (HR) and Global Payroll (GP) pages:

- Pay Calendar Table (GP) or Pay Calendar Table (HR only).

Create and schedule payroll cycles for your salary packaged employees in specific pay groups.

- Earnings Component (GP).

Define different earnings elements you use to pay your salary packaged employees through PeopleSoft Global Payroll. Used for expense tracking.

- Deductions Component (GP).

Set up the way the system processes deductions, including the priority of the deduction and how the deduction affects taxes. Used for expense tracking.

- Comp Rate Code Table (HR).

Select the *Maintained via Package Only* check box in the Australian Salary Packaging group box to define and review your compensation rate codes. Rate codes are attached to salary package components and are enrolled on the employee's Job Data - Compensation page.

- Ern/Ded Included (GP).

Select the non-packaged earnings and deductions elements that appear on the Package Summary component after you run the expense calculation process.

- Business Expenses (GP).

Enter actuals for salary packaging components defined as an expense payroll type. You must have a unique expense code for each package component to facilitate reconciliation of package expenditure.

2. Set up your Salary Packaging tables.

These tables enable you to set up components, additional components, package rules and package templates. Define the components that employees can include in their remuneration packages, as well as the tax liabilities on those components. Also define the rules associated with components and then group components into templates.

3. Set up your default rules and templates.

The Position Data - Description page and Job Code Table - Job Code Profile page enable you to attach the default package rule and template that you use when modelling your packages to a job code or a position. The defaults on the position override the defaults on the job code. Use the Company Table - Default Settings page to specify a default compensation rate code for TPY and TEC for a specific company to use when modelling applicant/employee packages.

4. Model and approve your applicant/employee packages.

This process enables you to enter a package and model it to the employee/employers preference. Approval of the employee salary package occurs when you select the *confirmed* status. Once the package is confirmed, enrol the employee into it.

5. Enrol/de-enrol employees into salary packages.

After you confirm the employee's selected package and run the package enrolment process, the system enrolls the rate codes onto the Compensation page of the employee's job record. This step establishes the employee's entitlements for processing through payroll. Enrolment into an approved salary package triggers the creation of multiple components of pay on the employee's Job Data - Compensation page.

6. Run the expense calculation process (GP).

This process uses the actual calculated amounts that have been processed by payroll and compares them to the budgeted amounts. The difference is shown as a percentage. You can monitor the employee's actual expenditures against the budgeted salary package. When packages end, you can monitor package expenditure on an ongoing basis during the life of the package (package period) and acquit any balances when you model against the employee's package for the package period.

See Also

[Chapter 2, "Understanding PeopleSoft Human Resources: Administer Salary Packaging," PeopleSoft Human Resources: Administer Salary Packaging Integrations, page 6](#)

Setting Up Salary Packaging Payroll Components

Salary Packaging relies on information defined in PeopleSoft Global Payroll and PeopleSoft Human Resources to ensure accurate payroll processing and to facilitate expenditure monitoring. When setting up your Salary Packaging business process, identify the different forms of remuneration and define the PeopleSoft Global Payroll and PeopleSoft Human Resources components that you'll use in your salary packages.

Note. Assign a unique earnings or deductions element for all package components, which enables you to track expenditure for each individual component. If you don't define and link different elements for each earning or deduction component, the system aggregates your salary packaging expenditures when it calculates them. As a result, you can't identify expenditures against individual components.

In this section, we discuss how to set up:

- Salary Packaging business expense codes.
- Salary Packaging compensation rate codes.
- Calendars for salary packaged employees.
- Salary packaged earnings and deductions.
- Non-salary packaged earnings and deductions elements.

See Also

[Chapter 2, "Understanding PeopleSoft Human Resources: Administer Salary Packaging," PeopleSoft Human Resources: Administer Salary Packaging Integrations, page 6](#)

Pages Used to Set Up Salary Packaging Payroll Components

Page Name	Object Name	Navigation	Usage
Pay Calendar Table (GP)	PKG_CALENDAR_TABLE	Compensation, Salary Packaging AUS, Define Salary Packaging, Pay Calendar-GP	Create pay calendars for your salary packaged employees in specific pay groups. Used for package modeling so that it can determine the budget values on the employee's package. Note. Use only if you have <i>both</i> PeopleSoft Global Payroll and PeopleSoft Human Resources installed.
Pay Calendar Table	PKG_CALENDAR	Compensation, Salary Packaging AUS, Define Salary Packaging, Pay Calendar-HR	Create and schedule pay calendars for your salary packaged employees in specific pay groups. Used for package modeling so that it can determine the budget values on the employee's package. Note. Use if you have PeopleSoft Human Resources installed.
Ern/Ded Included	PKG_ERN_DED_INCL	Compensation, Salary Packaging AUS, Define Salary Packaging, Included Earnings/Deductions	Specify the non-packaged earnings and deductions elements that appear on the Package Summary component after you run the expense calculation process.

Setting Up Salary Packaging Business Expense Codes

When defining your salary package components, you can link them to business expenses to help you track expenditures against the appropriate components. You must have a unique code for each package component (identified as an expense payroll type) to facilitate reconciliation of package expenditure.

Note. The value of monitoring expenditure for Salary Packaging is possible only if you are using PeopleSoft Global Payroll.

See Also

[Chapter 2, “Understanding PeopleSoft Human Resources: Administer Salary Packaging,” PeopleSoft Human Resources: Administer Salary Packaging Integrations, page 6](#)

PeopleSoft 8.8 Global Payroll for Australia PeopleBook, “Monitoring Salary Packaging Expenditure for Australia”

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Entering Additional Data in Human Resources Records,” Tracking an Employee’s Business Expenses

Setting Up Salary Packaging Compensation Rate Codes

When implementing Salary Packaging, define and review the compensation rate codes for your salary packages using the Comp Rate Code Table page accessed through Set Up HRMS, Foundation Tables, Compensation Rules, Comp Rate Code Table. When defining your salary package components and additional components, you can link them to compensation rate codes, which are enrolled on the employee’s Job Data - Compensation page Workforce Administration, Job Information, Job Data.

Maintained Via Package Only

If you are going to use pay components with Salary Packaging, select the Maintained via Package Only check box in the Australian Salary Packaging group box on the Comp Rate Code Table page. This check box, combined with other information on the employee’s job record, works to maintain salary package integrity.

Selecting this check box prompts a warning message when a salary packaged employee’s compensation rate codes are changed manually. The following warning message appears if you update or change an employee who has these rate codes assigned to them: “Salary Packaging Compensation Rate Code fields should be changed through Salary Packaging menu.”

Note. Set up your Salary Packaging rate codes with a rate code type of *flat amount* and a frequency of *A* (annual).

Defining Calendars for Salary Packaged Employees

Access the Pay Calendar Table page.

Pay Calendar Table

Pay Group: KAMONTHLY Monthly Pay Group

Calendar Generation Parameters

Pay Frequency: Monthly

Begin Date: **End Date:** **Generate Calendar**

Pay Periods Customize | Find | View All | First 1-5 of 20 Last

Pay Period Begin Date	Pay Period End Date		
01/05/2000	31/05/2000		
01/06/2000	30/06/2000		
01/07/2000	31/07/2000		
01/08/2000	31/08/2000		
01/09/2000	30/09/2000		

Pay Calendar Table page

Calendar Generation Parameters

Pay Frequency	Value comes from the Pay Frequency field on the Pay Groups AUS page in PeopleSoft Global Payroll—Set Up HRMS, Product Related, Global Payroll, Framework, Organizational, Pay Groups AUS. This group box enables you to set up default pay frequencies for the pay groups you use as part of Salary Packaging. The Package Calendar Table page also retrieves the frequency you selected.
Generate Calendar	Click this button to build a pay calendar.

Note. The calendars you generate on this page are used to determine the periods for budgeting purposes only. You must set up calendars before you can use the Salary Packaging budgeting feature.

Note. Use the Pay Calendar Table (GP) page if you have both PeopleSoft Global Payroll and PeopleSoft Human Resources installed. If you have only PeopleSoft Human Resources installed, use the Pay Calendar Table page. Both pages have the same functionality, except PeopleSoft Global Payroll uses the pay group key and PeopleSoft Human Resources uses the company/pay group key.

See Also

PeopleSoft 8.8 Global Payroll for Australia PeopleBook, “Setting Up PeopleSoft Global Payroll for Australia,” Entering Additional Pay Group Information

Setting Up Salary Packaged Earnings and Deductions

Set up the earnings and deductions elements that represent the different forms of remuneration in your organisation. Although you establish these tables as part of your PeopleSoft Global Payroll system, review them for use with Salary Packaging. Attach earnings and deductions elements to your package components using the Package Components — Expense Data page. These elements are used in the expense calculation process.

See Also

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

[Chapter 3, “Setting Up Salary Packaging,” Defining Non-Salary Packaged Earnings and Deductions Elements, page 18](#)

[Chapter 3, “Setting Up Salary Packaging,” Defining Expense Details for Salary Packaged Components, page 34](#)

PeopleSoft 8.8 Global Payroll for Australia PeopleBook, “Monitoring Salary Packaging Expenditure for Australia”

Defining Non-Salary Packaged Earnings and Deductions Elements

Access the Ern/Ded Included page.

The screenshot shows a web interface titled "Ern/Ded Included" with a sub-header "Earnings/Deductions Included in Sal Packaging Calculation". The interface includes a search bar and navigation controls. Below the header, there is a table with three rows of data. Each row has an input field for the element name, a search icon, the element name, and two buttons (+ and -).

Earnings/Deductions Included in Sal Packaging Calculation			
SP SUPSAC PR	🔍	Sal Pkg Salsac PRT	+ -
SP CAR FBT	🔍	Sal Pkg Car FBT	+ -
SP BONUS	🔍	Sal Pkg Bonus	+ -

Ern/Ded Included page

Element Name

Specify the non-packaged earnings and deductions elements that appear on the Package Summary component after you run the expense calculation process. You can then view the total value of any deductions, earnings, and expenses that are not included as a packaged component but have been paid out to the employee in the payroll.

You can see if expenditure outside the package has occurred for the employee and quickly respond to the non-packaged payments. These types of payments may prompt you to perform a package review or some other corrective action.

See Also

[Chapter 3, "Setting Up Salary Packaging," Setting Up Salary Packaged Earnings and Deductions, page 18](#)

PeopleSoft 8.8 Global Payroll for Australia PeopleBook, "Monitoring Salary Packaging Expenditure for Australia," Reviewing Salary Package Expenditures

Setting Up and Viewing Salary Packaging Tax Options

PeopleSoft delivers and maintains the Fringe Benefits Tax (FBT) and Goods and Services Tax (GST) tables in the system. Because you can create salary package components to represent fringe benefits, such as a car allowance or a housing allowance, review the FBT and GST table information as part of your salary package setup. The system uses these tables when it calculates salary package FBT and GST liabilities for package components. Link the tax liability information to a salary package component using the Additional Comp page.

In this section, we discuss how to:

- View Salary Packaging FBT and GST tax details.
- View Salary Packaging FBT statutory interest rates.
- Review Salary Packaging FBT motor vehicle statutory percentage information.
- Set Up Salary Packaging company payroll tax options.

- Maintain tax scales used in salary package calculations.

Pages Used to Define and View Salary Packaging Tax Options

Page Name	Object Name	Navigation	Usage
FBT/GST Rate Table	PKG_FBT_TBL	Compensation, Salary Packaging AUS, Define Salary Packaging, Review FBT/GST Rate Table.	View the FBT and GST rates for Australia. The GST percentage and rate for the calculation of Fringe Benefits Tax (FBT) appear.
FBT Stat Interest	PKG_FBT_INT_TBL	Compensation, Salary Packaging AUS, Define Salary Packaging, Review FBT Stat Interest Rate.	View FBT statutory interest rates. The statutory percentage rate used in the calculation of interest payments for depreciation of motor vehicles and low interest loans appear.
FBT Vehicle Rates	PKG_FBT_VEH_TBL	Compensation, Salary Packaging AUS, Define Salary Packaging, Review FBT Stat Vehicle Rate.	Review FBT motor vehicle statutory percentage information. The kilometre thresholds and the corresponding statutory percentages used in determining the taxable value of a motor vehicle appear.
State Payroll Tax	PKG_PYTX_RT_TBL	Compensation, Salary Packaging AUS, Define Salary Packaging, State Payroll Tax Rates.	Specify the payroll tax percent rate for all states where employees in a specific company are located. This page provides maintenance functions for the State Payroll Tax tables. These percentages are used in the notional calculation of tax during package modeling.
Tax Scales	PKG_TAX_SCALES_AUS	Compensation, Salary Packaging AUS, Define Salary Packaging, PAYG Tax Scales.	Maintain tax scales used in package calculations. Set up and view the thresholds and the percentage of tax for each threshold. Note. Use only if you have PeopleSoft Human Resources installed.

Viewing Salary Packaging FBT and GST Tax Details

Access the FBT/GST Rate page.

FBT/GST Rate	
Country:	AUS Australia
FBT and GST Rates Find View All First 1 of 4 Last	
Effective Date:	01/01/2000 Status: Active
Description:	FBT Tax Rate
FBT Percent:	48.500
Min reportable FBT liable ern:	1000.00
GST Rate:	10.000

FBT/GST Rate page

FBT and GST Rates

FBT Percent (Fringe Benefits Tax percentage)

The rates are set by the Australian Taxation Office, with any changes generally effective in line with the FBT year of April 1 to March 31.

Min reportable FBT liable ern (minimum reportable Fringe Benefits Tax liable earning)

When producing payment summaries, the system has to determine if an employee has received, in the FBT year, fringe benefits with a total taxable value exceeding \$1000. A collection process totals the FBT liable earnings and, if they exceed \$1000, reports the grossed-up taxable value on the payment summary.

GST Rate

The GST on your package components is calculated using this rate.

See Also

[Chapter 3, "Setting Up Salary Packaging," Viewing Salary Packaging FBT Statutory Interest Rates, page 21](#)

[Chapter 3, "Setting Up Salary Packaging," Reviewing Salary Packaging FBT Motor Vehicle Statutory Percentage Information, page 22](#)

[Chapter 3, "Setting Up Salary Packaging," Setting Up Salary Packaging Company Payroll Tax Options, page 23](#)

[Chapter 3, "Setting Up Salary Packaging," Maintaining Tax Scales Used in Salary Package Calculations, page 25](#)

Viewing Salary Packaging FBT Statutory Interest Rates

Access the FBT Stat Interest page.

FBT Stat Interest	
Country:	AUS Australia
FBT Statutory Interest Rate Find View All First ◀ 1 of 4 ▶ Last	
Effective Date:	01/04/1998 Status: Active
Description:	FBT Statutory Interest Rate
Statutory Percent:	6.700

FBT Stat Interest page

FBT Statutory Interest Rate

Statutory Percent Used in the calculation of interest payments for depreciation of motor vehicles and low interest loans.

See Also

[Chapter 3, "Setting Up Salary Packaging," Reviewing Salary Packaging FBT Motor Vehicle Statutory Percentage Information, page 22](#)

[Chapter 3, "Setting Up Salary Packaging," Setting Up Salary Packaging Company Payroll Tax Options, page 23](#)

[Chapter 3, "Setting Up Salary Packaging," Maintaining Tax Scales Used in Salary Package Calculations, page 25](#)

[Chapter 3, "Setting Up Salary Packaging," Viewing Salary Packaging FBT and GST Tax Details, page 20](#)

Reviewing Salary Packaging FBT Motor Vehicle Statutory Percentage Information

Access the FBT Vehicle Rates page.

FBT Vehicle Rates

Country: AUS Australia

FBT Vehicle Rates View All First 1 of 2 Last

Effective Date: 23/05/2001 **Status:** Active

Description: FBT Statutory Factor

GST Grossup Pct: 10.000

Vehicle Statutory Percentage Customize Find View All First 1-4 of 4 Last

Mileage Limit (Km)	Statutory Percent
14,999	26.000
24,999	20.000
40,000	11.000
99,999,999	7.000

FBT Vehicle Rates page

FBT Vehicle Rates

GST Grossup Pct Used in the calculation of GST on vehicles.

Vehicle Statutory Percentage

Mileage Limit (Km) / Determine the taxable value of a motor vehicle.

Statutory Percent (mileage
limit kilometre/statutory
percentage)

The statutory percentage rate is used in the calculation of interest payments for depreciation of motor vehicles and in the calculation of FBT for components with a component type of motor vehicle.

See Also

[Chapter 3, “Setting Up Salary Packaging,” Viewing Salary Packaging FBT Statutory Interest Rates, page 21](#)

[Chapter 3, “Setting Up Salary Packaging,” Setting Up Salary Packaging Company Payroll Tax Options, page 23](#)

[Chapter 3, “Setting Up Salary Packaging,” Maintaining Tax Scales Used in Salary Package Calculations, page 25](#)

[Chapter 3, “Setting Up Salary Packaging,” Viewing Salary Packaging FBT and GST Tax Details, page 20](#)

Setting Up Salary Packaging Company Payroll Tax Options

Access the State Payroll Tax page.

State Payroll Tax

Company: KAB Australian Business Institute

State Payroll Tax Find | View All First 1 of 1 Last

*Effective Date: 01/01/2001

State	Tax Percent	Basis of Value
ACT Austl. Cap. Terr.	6.850	
NSW New South Wales	6.400	
NT Northern Territory	6.600	
QLD Queensland	4.900	
SA South Australia	6.000	

State Payroll Tax page

State Payroll Tax

State/Tax Percent

If you want the notional payroll tax liability to be calculated during salary package modeling, enter the tax percent for each state in which you pay employees. If you don't enter these details, the system does not calculate liability for payroll tax for employees when you model salary packages. The tax percentage rates you enter are *only* used in PeopleSoft Salary Packaging calculations.

For most Australian states, the tax rate varies based on the value of your company payroll. To obtain an even more accurate notional tax calculation, specify the percentage rate of tax for each state. To do so, enter a rate based on your knowledge of your company payroll.

For example, if you know the amount of your total wages bill in a given state, and you know that the threshold you are allowed to take effectively reduces your true net payroll tax rate from 7 percent to 6.75 percent, then enter the 6.75 percent here. Then your true net rate is used in package modeling, so your notional calculations in Salary Packaging are more accurate.

Note. Specify company payroll tax liability on the Company Table.

See Also

[Chapter 3, "Setting Up Salary Packaging," Viewing Salary Packaging FBT Statutory Interest Rates, page 21](#)

[Chapter 3, "Setting Up Salary Packaging," Reviewing Salary Packaging FBT Motor Vehicle Statutory Percentage Information, page 22](#)

[Chapter 3, "Setting Up Salary Packaging," Maintaining Tax Scales Used in Salary Package Calculations, page 25](#)

[Chapter 3, "Setting Up Salary Packaging," Viewing Salary Packaging FBT and GST Tax Details, page 20](#)

Maintaining Tax Scales Used in Salary Package Calculations

Access the Tax Scales page.

The screenshot displays the 'Tax Scales' page. At the top, there is a tab labeled 'Tax Scales'. Below it, the 'Tax Scale: 1' is shown. The 'Tax Scale Details' section includes fields for '*Effective Date:' (15/11/2002), '*Status:' (Active), and '*Description:'. Below this is a 'Threshold Details' table with columns for '*Weekly Threshold Amount', 'A Percent', and 'B Amt'. The table has a single row with empty input fields and '+' and '-' buttons for navigation.

Tax Scales page

Threshold Details

Weekly Threshold Amount / A Percent / B Amt (weekly threshold amount and a percentage and B amount)

Set up and view the thresholds and the percentage of tax for each threshold.

These values correspond to the information on the “*Statement of Formulae for Calculating Income Tax Instalments*”, issued by the Australian Taxation Office (ATO). In addition to the tax scales on that document, PeopleSoft has introduced tax scales A, B, and L for processing annual leave, long service leave, and leave bonus payments.

The system identifies the top threshold and then works down, checking the weekly amounts and using its logic to calculate the tax installment.

Note. If you need to apply special tax rates, create your own tax scales using the Tax Scales page. For example, you might choose to establish a Tax Scale E where no tax applies for tax exempt employees or for those employees who you keep on a flat amount or percentage of tax due to instructions that you’ve received from the ATO.

See Also

[Chapter 3, “Setting Up Salary Packaging,” Viewing Salary Packaging FBT Statutory Interest Rates, page 21](#)

[Chapter 3, “Setting Up Salary Packaging,” Reviewing Salary Packaging FBT Motor Vehicle Statutory Percentage Information, page 22](#)

[Chapter 3, “Setting Up Salary Packaging,” Setting Up Salary Packaging Company Payroll Tax Options, page 23](#)

[Chapter 3, “Setting Up Salary Packaging,” Viewing Salary Packaging FBT and GST Tax Details, page 20](#)

Setting Up Additional Salary Package Components

Many components that make up your salary package might incur additional liabilities, such as FBT, GST, or payroll tax. The cost of these liabilities can be borne by either the employer or the employee. Define the cost liability and who will carry it—the employee or the employer—as *additional components*.

Note. Additional component codes must be unique. You cannot associate an additional component with a component of the same name. Consider this carefully when defining codes for both components and additional components. The system warns you when you use a duplicate component code.

Pages Used to Define Additional Salary Package Components

Page Name	Object Name	Navigation	Usage
Additional Comp	PKG_ADD_CMP_TBL	Compensation, Salary Packaging AUS, Define Salary Packaging, Additional Components.	Define the liabilities associated with each of your salary packaging components. Determine the level of package remuneration in which to include these liabilities—Total Package Value (TPV) or Total Employment Cost (TEC).

Defining Salary Package Component Liabilities

Access the Additional Comp page.

Additional Comp

Additional Component: CARFBT

Additional Component Definition Find | View All First 1 of 1 Last

*Effective Date: 07/01/1986 *Status: Active

*Description: Car FBT

Short Description: Car FBT

*Additional Component Type: Fringe Benefits Tax

*Package Level: Total Pkg Value

Comp Rate Code: KAFB02 SP Car FBT

Additional Comp page

Additional Component Definition

Additional Component Type	<p>The type of liability the additional component represents. Your choice determines the tax tables and rates the system references when it calculates the salary package component liability. Select <i>Fringe Benefits Tax</i>, <i>Goods & Services Tax</i>, or <i>Payroll Tax</i>.</p> <p>The value you select here controls the display of the Gross Up Calculation field.</p>
Package Level	<p>Enables you to set how this additional component affects the employee's package. Select:</p> <p><i>No Effect</i>: Has no effect on the employee's package either in total employee cost or total package value. Typically used where you select <i>Goods & Services Tax</i> in the Addl Component Type field.</p> <p><i>Total Empl Cost (TEC)</i>: Usually relates to the cost or oncost that is borne by the employer as a result of employing the employee. If you select this option, you could be indicating that the employer will pay the cost of the liability.</p> <p><i>Total Pkg Value (TPV)</i>: Typically used where the cost or oncost is borne by the employee. An example of this would be FBT. The value of this additional component forms part of the employees overall package. Selecting this could indicate that the employee will pay the liability.</p>
Gross up Calculation	<p>This field appears only when you select <i>Goods & Services Tax</i> in the Addl Component Type field. The type of component this additional component relates to determines the calculation method. There are, however, no set rules for components and calculation rules. You must select them. Select <i>Type 1 – Tax Credit Claimed</i> or <i>Type 2 – No Input Tax Credit</i>.</p> <p>Input tax credits are tax credits that a company can claim back for the GST paid on the supply of a good or service. Where that good or service forms part of an employee's salary package, the calculation of the total value of the package item changes if the company is claiming part of the cost back as an input tax credit.</p>
Comp Rate Code	<p>Enables you to utilize the multiple components of pay functionality for your salary packaging. Compensation rate codes are enrolled onto the employee's Job Data - Compensation page. If you are using PeopleSoft Global Payroll, you can link salary package components and additional components to different types of PeopleSoft payroll entities to facilitate the payment of earnings and deductions through your payroll system.</p> <hr/> <p>Note. Only compensation rate codes with the Salary Packaging check box selected on the Comp Rate Code Table can be assigned to package components and additional components. You must also define the rate code as a flat amount rate code type.</p> <hr/>

See Also

[Chapter 3, "Setting Up Salary Packaging," Setting Up Salary Packaging Payroll Components, page 15](#)

Setting Up Salary Package Components

Package components identify the different forms of remuneration that can be included in salary packages in your organisation. When defining components, identify different attributes that determine the value of the component and any associated liabilities (additional components), the information to be enrolled to payroll, and the detail required to track expenditures against this component.

Note. Package components are reusable—you can include them in any number of packages or templates, so you don't need to define components more than once.

In this section, we discuss how to:

- Set up base salary package components.
- Link Salary Packaging additional components with components.
- Define contributing salary package components.
- Define expense details for salary packaged components.

Pages Used to Set Up Salary Package Components

Page Name	Object Name	Navigation	Usage
Base Component	PKG_BSE_CMP_TBL	Compensation, Salary Packaging AUS, Define Salary Packaging, Package Components.	Set up basic information about the salary package component.
Additional Comp	PKG_BSE_CMP_ADD	Compensation, Salary Packaging AUS, Define Salary Packaging, Package Components.	Associate additional components with a salary package component.
Calculated Comp	PKG_BSE_CMP_CAL	Compensation, Salary Packaging AUS, Define Salary Packaging, Package Components.	Define contributing components. To assist in the accurate calculation of components dependent on the value of other components, define the calculation starting point and the other components that affect the value on the Expense Data page.
Expense Data	PKG_BSE_CMP_EXP	Compensation, Salary Packaging AUS, Define Salary Packaging, Package Components.	If you are planning on tracking expenditure (the package expense calculation) and you have PeopleSoft Global Payroll installed, specify package component expenses information for each component. Enter the details and identify the payroll types and related data to track expenditures against package components.

Setting Up Base Salary Package Components

Access the Base Component page.

Base Component	Additional Comp	Calculated Comp	Expense Data
Component: CAR			
Base Component Definition Find View All First 1 of 1 Last			
*Effective Date:	07/01/1986	*Status:	Active
*Description:	Car		
Short Description:	Car		
*Component Type:	Motor Vehicle		
*Package Level:	Total Pkg Value		
*Projection Type:	Regular		<input type="checkbox"/> Add to Gross Pay
Comp Rate Code:	KASP02	SPCar	
<input type="checkbox"/> Enrol Benefits Base	Benefit Base Comp Rate Code:		

Base Component page

Base Component Definition

Component Type Determines the data the system needs when you are modeling your packages.

The component definition drives more than the Fringe Benefits Tax calculation. It drives the enrolment, expense, and component calculations for all components—regardless of whether they are subject to FBT. Component definition is essential to the accurate calculation and administration of each package component.

Package Level PeopleSoft can represent the value of remuneration at two different levels—*Total Empl* (total employment), *Cost* (TEC), *Total Pkg* (total package), and *Value* (TPV). By selecting the level for each component, you identify the level of remuneration of the component value that should be included.

Projection Type Used during package expense calculation. It's possible to project the expenditure to the end of the package based on the actual expenditure of the component to date. The method of projection can differ for different types of components. Select:

Ad Hoc: This does no calculation. The value of projected expenditure at period end reflects the actual expenditure of the component.

Regular: Projection is based on the actual expenditure to date. The rate of expenditure is assumed to be the same for the remainder of the effective period of the component. Calculation of the projected period end expenditure looks at the actual expenditure against the period to date and calculates for the remaining effective period expenditure at the same rate.

Budget: During modeling you can identify an expenditure budget. This gives you the ability to identify known expenditure expectations for components spent on an irregular basis. The information entered during modeling is used to reflect the projected expenditure at period end.

Note. Regardless of which option you select, if the component start date is in the future, the system uses the budgeted component amount when calculating the impact of the component on an employee salary package.

Comp Rate Code
(component rate code)

Enables you to use the multiple components of pay functionality for your salary packaging. If you are using PeopleSoft Payroll, link salary package components and additional components to different types of PeopleSoft Payroll entities to facilitate the payment of earnings and deductions through your payroll system.

Add to Gross Pay

Enables you to identify components to include in the notional calculation of Pay As You Go tax liabilities.

Select this check box for components that represent cash payments. At the time of modeling, the value of components with this check box selected are aggregated and the PAYG tax liability is calculated on the total (such as salary and allowances).

**Enrol Benefits Base /
Benefit Base Comp
Rate Code** (enrollment
benefits base/benefit base
compensation rate code)

Select this check box and a specific rate code to update the annual benefits base rate at the time of package enrollment. This field is available only when you have selected a component type of *Percentage of Benefits Base* or *Pct of Contributing Components* on the Base Component page.

Some of your benefits, like superannuation, might be calculated using the Annual Benefits Base Rate. When this is the case, it is possible to also maintain the value of the annual benefits base rate from within Salary Packaging.

See Also

[Chapter 3, “Setting Up Salary Packaging.” Linking Salary Packaging Additional Components With Components, page 31](#)

[Chapter 3, “Setting Up Salary Packaging.” Defining Contributing Salary Package Components, page 32](#)

[Chapter 3, “Setting Up Salary Packaging.” Defining Expense Details for Salary Packaged Components, page 34](#)

Linking Salary Packaging Additional Components With Components

Access the Additional Comp page.

Base Component | **Additional Comp** | Calculated Comp | Expense Data

Component: CAR Car

Additional Components for Component Find | View All First 1 of 1 Last

Effective Date: 07/01/1986 **Status:** Active

Additional Components Find | View All First 1-3 of 3 Last

CARFBT	Car FBT	FBT	+	-
CARGST	Car GST	GST	+	-
CARPRT	Car PRT	Payroll Tx	+	-

Additional Comp page

Additional Components for Component

Additional Components

Many components attract additional liabilities, such as FBT, payroll tax, or GST. PeopleSoft defines these liabilities as additional components.

Select additional components to include in the Package Component Table for this component. You can attach multiple additional components.

Additional components vary from component to component. For example, a car component might attract FBT, payroll tax, and GST. A salary component only payroll tax and some components like superannuation might be exempt from all tax.

Note. You must first define your additional components on the Additional Comp page.

See Also

[Chapter 3, “Setting Up Salary Packaging,” Setting Up Base Salary Package Components, page 29](#)

[Chapter 3, “Setting Up Salary Packaging,” Defining Contributing Salary Package Components, page 32](#)

[Chapter 3, “Setting Up Salary Packaging,” Defining Expense Details for Salary Packaged Components, page 34](#)

Defining Contributing Salary Package Components

Access the Calculated Comp page.

The screenshot shows the 'Calculated Comp' page. At the top, there are four tabs: 'Base Component', 'Additional Comp', 'Calculated Comp' (which is active), and 'Expense Data'. Below the tabs, the component name is 'CAR' and the description is 'Car'. The 'Component Calculation Definition' section includes:

- Effective Date: 07/01/1986
- Status: Active
- *Calculation Starting Value: None (dropdown menu)

 Below this is the 'Contributing Components' section, which is currently empty. It has a table with two columns: '*Component' and '*Effect on Component'. The '*Effect on Component' column has a dropdown menu set to 'Adds to' and two buttons, '+' and '-'.

Calculated Comp page

Component Calculation Definition

Calculation Starting Value

If you select a component type of *Pct of Contributing Components* and a Package Level of *Total Empl Cost* on the Base Component page, determine the calculation starting value for this component: either *None* or *TPV* (total package value).

If you accept the default value of *None*, the value of the component is calculated as a percentage of the specified contributing components.

If you change the value to be *Total Pkg Value* (total package value), this value is used as the starting point for the value of this component in the package that you are modelling. Any components that are then specified as contributing components add or subtract from the total package value before the component is calculated.

If you don't enter any contributing components, and the value is *Total Pkg Value*, the value of the component is calculated to be a percentage of the total package value. Enter the percentage value during modeling.

If you indicate a component type of *Pct of Contributing Components*, indicate a value of *Total Pkg Value* or enter at least one contributing component. If you do not do either (or both) of these, an error message appears and you must modify the component definition before saving.

Contributing Components

- Component** Select components you have also set up using the Package Component Table pages. These components are dependent on the value of the component you are setting up.
- Effect on Component** Specify whether the contributing component *Adds to* or *Subtracts From* the total value of the contributing components (if there is a special effect on the component).

See Also

[Chapter 3, “Setting Up Salary Packaging,” Setting Up Base Salary Package Components, page 29](#)

[Chapter 3, “Setting Up Salary Packaging,” Linking Salary Packaging Additional Components With Components, page 31](#)

[Chapter 3, “Setting Up Salary Packaging,” Defining Expense Details for Salary Packaged Components, page 34](#)

Defining Expense Details for Salary Packaged Components

Access the Expense Data page.

Expense Data page

- GST Calculation** Defines how GST is tracked as an expense. Select:
GST Included: Indicates that the component has GST included in the value of the component. For example, if the expense amount picked up is \$100, this option treats it as \$91 base and \$9 GST.

GST Excluded: Indicates that the expense calculation will include the GST on top of the component value. For example, if the expense amount picked up is \$100, this option treats it as \$100 base and \$10 GST.

GST Only: Indicates that the expense calculation should calculate only the GST. For example, if the expense amount picked up is \$100, this option treats it as \$0 base and \$100 GST.

The GST is calculated using the GST rate from the FBT/GST Rate page.

Payroll Type, Earnings, Deduction, Expense Code

The Payroll Type field identifies which payroll entity to reference to track expenditure against this component for the employee during the package expense calculation. Select *Deduction*, *Earning*, or *Expenses*.

Your selection enables or disables the fields in the Earnings, Deductions, and Business Expenses group boxes.

During the expense calculation process, the actual amounts used are the values recorded against the earnings and deductions through payroll. However, if using the Expense Code field, the values entered on the Business Expenses page in Administer Workforce are used as the actual amounts.

This enables you to track expenditure through both earnings and deductions, or deductions and expense accounts, or even multiple earnings elements. This gives you the flexibility to administer payments in any way you prefer, but still have the expenditure accurately reflected against the employee's package.

It is possible to enter more than one Payroll Type when tracking expenditure, which is necessary for some components where the expenditure is not always made against a consistent payroll entity. For example, the salary component might have multiple entries to reflect the different earnings elements that are used to make payments that should be reflected as salary.

Note. If you are not using PeopleSoft Payroll, you do not need to complete the Expense Data page.

See Also

[Chapter 3, "Setting Up Salary Packaging," Setting Up Base Salary Package Components, page 29](#)

[Chapter 3, "Setting Up Salary Packaging," Linking Salary Packaging Additional Components With Components, page 31](#)

[Chapter 3, "Setting Up Salary Packaging," Defining Contributing Salary Package Components, page 32](#)

[Chapter 3, "Setting Up Salary Packaging," Setting Up Additional Salary Package Components, page 26](#)

[Chapter 3, "Setting Up Salary Packaging," Viewing Salary Packaging FBT and GST Tax Details, page 20](#)

[Chapter 5, "Managing Salary Packages," Enrolling Salary Packages, page 67](#)

PeopleSoft 8.8 Global Payroll for Australia PeopleBook, "Monitoring Salary Packaging Expenditure for Australia"

Setting Up Salary Package Templates

Use package templates to define groups of components to use as defaults for employees that qualify for similar salary packages. For example, you can define one salary package template for executives, another for sales managers, and another for administrative assistants.

Note. Associate salary package templates with jobs on the Job Code Table - Job Code Profile page—Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table—and positions on the Position Data - Description page—Set Up HRMS, Product Related, Organizational Development, Position Data—so that the employee in the job or position is automatically associated with the right salary package option.

Pages Used to Set Up Salary Package Templates

Page Name	Object Name	Navigation	Usage
Package Template	PKG_TMP_TBL	Compensation, Salary Packaging AUS, Define Salary Packaging, Package Template.	Define salary package templates. Define a standard collection of components that are automatically defaulted into package model records for employees or applicants.

Defining Salary Package Templates

Access the Package Template page.

Package Template

Template ID: KAMIDDLE

Template Details Find | View All First 1 of 1 Last

*Effective Date: 07/01/1986 *Status: Active

*Description: Middle Management Template

Short Description: Mid Mgmt

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

*Package Component	Description		
SALARY	Salary Component	+	-
SUPSGC	SGC Superannuation	+	-

Package Template page

Package Components

Package Component

Enter the components that form part of this template that are automatically assigned to your employees as defaults when modeling their packages on the Package Model page.

The number and type of components you enter depend on your organisation's salary package business requirements. Define components using the Package Components Table component.

Note. While we recommend that you make your templates as complete as possible, you can modify any template to fit the exact requirements for that employee after the template is included in an employee's salary package model.

See Also

[Chapter 3, "Setting Up Salary Packaging," Setting Up Salary Packaging Payroll Components, page 15](#)

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Setting Up Jobs," Classifying Jobs

PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions, "Setting Up Positions," Creating Positions

[Chapter 4, "Modelling Salary Packages," page 41](#)

Setting Up Salary Package Rules

Define rules to ensure that salary packages meet legislative requirements for remuneration, to meet company policy, or to maintain data integrity and standards. Define as many rules, or sets of rules, as you need to use when modelling packages.

PeopleSoft applies package rules to validate the package models when you save them. If the components of a package model do not comply with all the rules, the system issues an error message and doesn't enable you to save the package until you have modified the components so that they comply.

Associate package rules with package templates, use package rules only, use templates only, or use neither templates nor rules when you model salary packages. Also associate default rules with job codes or positions.

Pages Used to Set Up Salary Package Rules

Page Name	Object Name	Navigation	Usage
Package Rule	PKG_RULE_TBL	Compensation, Salary Packaging AUS, Define Salary Packaging, Package Rules.	Create salary package rules. PeopleSoft applies package rules to validate the package models when you save them.

Creating Salary Package Rules

Access the Package Rule page.

Package Rule

Package Rule ID: KAMIDDLE

Rule Definition

***Effective Date:** 07/01/1986 Find | View All | First 1 of 1 Last

***Status:** Active + -

***Description:** Middle Management Rule **Short Description:** Mid Mgmt

Component Rules

*Package Component	*Operator	Comparison Value	*Amt or Pct	*Comparing Component	Required		
SALARY	>		Amt	Component Value	<input checked="" type="checkbox"/>	+	-
SALARY	<	70,000.00	Amt	Component Value	<input checked="" type="checkbox"/>	+	-
SUPSGC	>=	7.00	Pct	Component Value	<input type="checkbox"/>	+	-

Package Rule page

Component Rules

Package Component

Select the component to which you want to apply some type of rule.

Operator

The mathematical values used in the application of this rule.

Comparison Value

Enter a figure that is defined as an amount (*Amt*) or a percent (*Pct*). This figure is used in the application of the rule.

Amt or Pct (amount or percent)

Select whether the figure in the Comparison Value field is either an amount or a percent.

Comparing Component

Indicates what the component is compared to when validating that the rule has been satisfied. This field prompts for the final part of the rule. If selecting *Pct*, select what it is a percent of: *Total Package Value*, *Component Value*, or *Total Employment Cost*.

If selecting an amount, select *Component Value*.

Note. When defining rules with a comparing component of *Component Value*, ensure that the amount or percent option is consistent with the component type. For a component type of *Pct* of Contributing Components, the Amt or Pct value must be *Pct*. If the component type is Flat Amount, the value must be *Amt*.

Required

Select to indicate whether individual components must be included in the salary package. If a component is identified in the package rule as Required, the system checks that the component exists at the package begin and end dates.

If the components of a package model do not comply with all the rules, the system issues an error message and doesn't enable you to save the package until you have modified the components so that they comply.

Note. It is possible for a component that is required to exist at the begin and end dates of the package, but to not be effective for the entire package period. Take care when modeling mandatory components to ensure that they are effective for the entire package period.

See Also

[Chapter 3, “Setting Up Salary Packaging,” Setting Up Salary Packaging Payroll Components, page 15](#)

[Chapter 4, “Modelling Salary Packages,” page 41](#)

Setting Up Salary Packaging Defaults

Within PeopleSoft, there are specific pages you use to attach your package rules and templates. These tables act as defaults in the employee salary packaging modelling. Specify various salary packaging default values using the following pages in PeopleSoft HRMS:

- Company Table - Default Settings—Set Up HRMS, Foundation Tables, Organization, Company.
- Job Code Table - Job Code Profile—Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table.
- Position Data - Description—Set Up HRMS, Product Related, Organizational Development, Position Data.

These default values assist you in setting up consistent employee salary packages when you model packages as part of your salary packaging business process. They streamline your modelling time per employee and ensure consistent application of salary packages for employees in the same jobs or positions in your organisation.

In this section, we discuss how to:

- Set up your organisation’s TPV and TEC compensation rate codes.
- Set up default package templates and rules for jobs and positions.
- Set up default salary packaging pay frequencies.

Setting Up Your Organisation’s TPV and TEC Compensation Rate Codes

To establish default TEC and TPV compensation rate codes for a specific company to use when modelling employee packages, use the Company Table - Default Settings page—Set Up HRMS, Foundation Tables, Organization, Company. Select a salary packaging compensation rate code from among the valid codes set up on the Comp Rate Code Table component. These companies are then enrolled into compensation containing TEC and TPV amounts.

You can also specify whether tax is applicable to the default compensation rate codes you select. When you select the Liable for Payroll Tax check box, the state payroll tax rates you set up on the State Payroll Tax page are used in the package compensation calculation for your salary packaged employees.

Note. You must enter a TPV. This compensation rate code is referenced in the rules used when processing terminations for packaged employees (unused leave is paid out at the packaged rate).

See Also

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

Setting Up Default Package Templates and Rules for Jobs and Positions

Salary packaging is completed on an individual basis. Each employee may require different components and the overall value of the package may be unique to that employee. Therefore, a package is always modelled for a single employee.

However, if you structure your organisation using positions or base your remuneration structures on jobs, set up defaults for package templates and rules that administer salary packages by default standards or minimum levels of remuneration to employees based on their positions and jobs.

To specify a default package template and package rule ID for a job code, use the Job Code Table - Job Code Profile page—Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table—access the Australian group box, and select the job code to which you are assigning salary packaging defaults.

To update position data to use the salary packaging defaults, access the Australian group box on the Position Data - Description page—Set Up HRMS, Product Related, Organizational Development, Position Data.

See Also

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

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

Setting Up Default Salary Packaging Pay Frequencies

When you are defining calendars for salary packaged employees, the pay frequency comes from the value you enter in the Pay Frequency field in the Salary Packaging group box on the Pay Groups AUS page in PeopleSoft Global Payroll—Set Up HRMS, Product Related, Global Payroll, Framework, Organizational, Pay Groups AUS.

This group box enables you set up default pay frequencies for the pay groups you use as part of Salary Packaging. The frequency you select is also retrieved by the Package Calendar Table page, which enables the budgeting capabilities in the actual salary package because the system needs to know over what type of frequency to divide the component totals.

See Also

PeopleSoft 8.8 Global Payroll for Australia PeopleBook, “Setting Up PeopleSoft Global Payroll for Australia,” Entering Additional Pay Group Information

CHAPTER 4

Modelling Salary Packages

This section provides an overview of the modelling of salary packages for Australia and discusses how to:

- Model salary packages for employees.
- Model salary packages for applicants.
- Copy applicant salary packages to the Employee Salary Package component.

Understanding Salary Package Modelling

Salary package modelling enables you to explore different package scenarios to find satisfactory solutions and alternatives for employee salary packages. You can save and report on any number of package variations during the modelling process.

Modelling occurs at the employee level and is an employee-specific process. If you're modelling packages for employees, use the Employee Salary Package pages. If you're using the Recruiting business process in PeopleSoft Human Resources, you can also model salary packages for applicants using the Applicant Salary Package pages.

After you decide on one model that works best for both employer and employee, confirm and enrol that package.

Note. You cannot begin modelling with the Administer Salary Packaging application until you have defined all of the different base components and additional components that support your remuneration offerings. Before you start the modelling process, review your components and additional components on the Employee Salary Packaging component to understand the different calculations that occur during the modelling process.

See Also

[Chapter 3, “Setting Up Salary Packaging,” Setting Up Salary Packaging Payroll Components, page 15](#)

[Chapter 3, “Setting Up Salary Packaging,” Setting Up Additional Salary Package Components, page 26](#)

[Chapter 4, “Modelling Salary Packages,” Modelling Salary Packages for Employees, page 42](#)

[Chapter 4, “Modelling Salary Packages,” Modelling Salary Packages for Applicants, page 57](#)

Common Elements Used in This Chapter

Total Employment Cost (TEC)	Displays the value of salary packages at two different levels. This level represents the cost to the employer.
------------------------------------	--

Total Package Value (TPV)	Displays the value of salary packages at two different levels. This level represents the value to the employee.
Model Number	Enables you to model several packages and package scenarios that share the same effective date. Set a unique increment for the model number to number each package modeled with the same effective date. When you use the same effective date, the model number automatically increments.
Package Status	Indicates whether you are working with a salary package that is proposed (planned), current (existing), or history (finalized). When you first begin modelling a package for an employee, the system automatically sets the status to proposed. After you've confirmed and enrolled a package for an employee, the system changes the status to current. When the status is history, you're looking at an employee package that has been confirmed and enrolled, but is no longer in effect.

Modelling Salary Packages for Employees

When modelling salary packages for employees, combine any number or type of components into a package to suit both the organisation and employee.

The Employee Salary Package component includes two sets of pages for tracking base and additional component values for the employee package model. The annual amount pages display values on an annual basis, while the period pages display component and additional component amounts calculated for the effective period of the package component. Regardless of which page set you use, you always enter annual amounts for components and additional components, but you can enter them on either page.

At the end of the process, confirm only one package—the package on which the payment is based.

Note. Entering the same amounts and dates results in different TPV and TEC amounts appearing on the two sets of pages. One represents values for a year (from the package start date) and the other the period of the package component.

In this section, we discuss how to:

- Define employee salary package details.
- Set up annual base components for employees.
- Enter package component details.
- Enter salary package component budget details for employees.
- View annual additional salary package components for employees.
- Set up period base components for employees.
- View additional period components for employees.
- View package component PAYG tax liabilities for employees.

Pages Used to Model Salary Packages for Employees

Page Name	Object Name	Navigation	Usage
Package Model	PKG_MDL_TBL	Compensation, Salary Packaging AUS, Create Salary Packaging, Employee Salary Package, Package Model .	Establish the salary package and specify options that drive the calculation of package values for modelling purposes.
Base Components	PKG_MDL_BSE_CMP	Compensation, Salary Packaging AUS, Create Salary Packaging, Employee Salary Package, Base Components.	Enter base component details that drive package value calculations on an annual basis. Components, effective for only part of the year, have a full year equivalent amount that appears on this page.
Additional Comp	PKG_MDL_ADD_CMP	Compensation, Salary Packaging AUS, Create Salary Packaging, Employee Salary Package, Additional Comp	View the additional component values (expressed as an annual value) associated with the Base Components page. For each component, view the associated additional components as well as component totals.
Base Comp (Per)	PKG_MDL_BSE_CMP_PE	Compensation, Salary Packaging AUS, Create Salary Packaging, Employee Salary Package, Base Comp (Per)	Enter base component details that drive package value calculations on an annual basis. Components, effective for only part of the year, have a prorated amount that appears on this page.
Addtnl Comp (Per)	PKG_MDL_ADD_CMP_PE	Compensation, Salary Packaging AUS, Create Salary Packaging, Employee Salary Package, Addtnl Comp (Per)	View the additional component values (expressed as part year values, depending on the start and end dates of the components) associated with the Base Comp (Per) page.
Salary/Tax	PKG_MDL_SAL_NET	Compensation, Salary Packaging AUS, Create Salary Packaging, Employee Salary Package, Salary/Tax	View the impact to the employee's salary and tax obligations based on the package model.
Budget Entry	PKG_MDL_BUDGET	Compensation, Salary Packaging AUS, Create Salary Packaging, Employee Salary Package, Base Components Click the Bud button.	Set up a budget for the planned expenditure of a component.

Defining Employee Salary Package Details

Access the Package Model page.

Package Model	Base Components	Additional Comp	Base Comp (Per)	Addnl Comp (Per)
Evers,Nicole Christine		ID: KA0012	Empl Rcd#: 0	
Package Definition Find View All First 1 of 1 Last				
*Effective Date:	15/11/2002	Department:	ALL DEPTS	
Model Number:	0	Job Code:	800000	
Package Start Date:	15/11/2002	Package Status:	Proposed	
*Package End Date:	14/11/2003	<input type="checkbox"/> Confirmed	<input type="checkbox"/> De-enrolled	
		Review Date:	14/11/2003	
Salary Package Details				
*Currency Code:	USD	US Dollar		
*Tax Scale:	7	Tax Free Threshold (No Loading	*Payroll Tax State:	NSW
Template ID:	KAMIDDLE	Middle Management Template		
Rule ID:	KAMIDDLE	Middle Management Rule		
*Package Method:	Bottom Up			

Package Model page.

Package Definition

Package Start Date, Package End Date

Define the period for which the individual package is effective. For a new package, the default start date is the effective date.

The default package end date is a year after the package start date.

If your remuneration is effective for periods other than a year, override the end date to reflect the appropriate period of the package. When modelling packages for periods other than a year, enter all values as annual values. This is also true when entering component values—all amounts are annual amounts.

When determining the default end date, the system identifies the employee's pay frequency—from the pay group on the employee's job record—and determines the end date based on a year. For example, a package for a fortnightly employee has an end date 26 fortnights after the package start date. This provides different results in a leap year than in a non-leap year. A package for a fortnightly employee who starts April 1, 2000, has a default end date of March 31, 2001, but a package for the same employee that starts April 1, 2001, has a default end date of March 30, 2002. Twenty-six fortnights is consistently 364 days, but the year 2002 has 366 days, so there is a difference.

This means that when defaulting the package period it may not always appear to be the annual anniversary exactly.

Confirmed

Select when a modeled package has been approved and the employee is ready to be enrolled into it.

Note. The package enrollment process establishes compensation rate codes on the employee's job record based on the details included in the employee's confirmed package. PeopleSoft Global Payroll then uses this information to facilitate payments to the employee. Confirming a package does not automatically enroll the employee in the package. The status of the package remains *Proposed* until after you run the package enrollment process.

De-enrolled

Select to de-enroll an employee from a confirmed package. The check box is unavailable for entry during modelling because it is used only when managing enrolled packages.

Review Date

Indicates when the employee's salary package is due for review. The default date is the package end date. To flag this package for review at an earlier date, override the default.

Salary Package Details**Tax Scale**

Part of the modelling process is the calculation of the employee's Pay As You Go tax liability. The tax scale is used in the notional online calculation of the Gross to Net value of the package.

The default is the value you set up on the Tax Scales page, but you can override it while modelling an employee's salary package.

Note. The system warns you when you try to save the package if there is a difference between the package tax scale and the default tax scale on the Tax Scales page. If you want the tax scale used in packaging to be reflected through payroll, update the payee tax scales.

Payroll Tax State

Defaults from the employee's job record. You can override this value during modelling. Set up payroll tax state values on the State Payroll Tax page.

During modelling, you may need to calculate an oncost of payroll tax. To calculate the value for payroll tax, the process looks at the payroll tax state and obtains the values set on the State Payroll Tax table. A warning message appears if the state entered is different from the employees Job Data record. You can ignore this message if necessary.

Note. Payroll tax liabilities are reported based on the Payroll Tax State on the employee's Job record. If you want the value used during packaging to be used when reporting payroll tax liabilities, update the employee's Job Data record.

Template ID, Rule ID

Select a template ID to default components or groups of components into the employee's package model. If you've already defined templates using the Package Template page, specifying an ID saves you from entering the same components repeatedly for different employees who qualify for the same salary packages.

Select a rule ID to specify the rules the system uses to validate the employee's salary package when the package is saved. Use package rules to ensure the modeled package complies with legislative requirements and company policies.

Note. If you have associated a template ID or rule ID with job codes or positions in your organization, the system defaults the IDs based on the employee's job code or position. You can override the default value during package modelling.

Package Method

The method of packaging used when modelling. Select:

Top Down (starting at the TEC): Enter the total (target) employment cost into the Target TEC box. As components are added or values changed, regardless of whether they are paid by the employee or employer, the cash component is reduced.

Middle Out (starting at the TPV): This approach enables you to enter the total package amount you want to achieve. The employer payments (oncosts) are not taken into account with the TPV.

Bottom Up (starting with an individual component): The Package Method controls the display of the Target TVP and TEC fields.

Target TPV / Target TEC

If you select *Top Down* or *Middle Out* as the package method, specify a Target TEC or Target TPV.

When modelling using these methods, a package balance is calculated based on the value of components and the specified target value. When entering the package details, select a component to assume the value of the balance by selecting the Bal (balance) check box for that component on the Base Components page (annual) and Base Comp (Per) (period) page. This saves you the time and effort required to manipulate component values to reach a zero balance.

See Also

[Chapter 3, "Setting Up Salary Packaging," Maintaining Tax Scales Used in Salary Package Calculations, page 25](#)

[Chapter 3, "Setting Up Salary Packaging," Setting Up Salary Package Templates, page 36](#)

[Chapter 3, "Setting Up Salary Packaging," Setting Up Salary Package Rules, page 37](#)

[Chapter 5, "Managing Salary Packages," Confirming Salary Packages, page 66](#)

[Chapter 4, "Modelling Salary Packages," Modelling Salary Packages for Applicants, page 57](#)

Setting Up Annual Base Components for Employees

Access the Base Components page.

Package Model | **Base Components** | Additional Comp | Base Comp (Per) | Addtnl Comp (Per) | Salary/Tax

Evers, Nicole Christine ID: KA0012 Empl Rcd#: 0

Package Base Components Find | View All First 1 of 1 Last

Effective Date: 15/11/2002 Model Number: 0 Package Status: Proposed

Package Components Find | View All First 1-2 of 2 Last

		*From	*To	TPV	TEC	Bal	Dtls	Bud	
SALARY	Salary	15/11/2002	14/11/2003	64000.00	68096.00				+ -
SUPSGC	SGC Super	15/11/2002	14/11/2003	6400.00	6809.60				+ -

Package Annual Total

Current TPV/TEC: 70400.00 74905.60
 C/F Target TPV/TEC:

Base Components page

Package Base Components

Package Components

As part of the package template you specify for this employee on the Package Model page, the system defaults all of the components you defined on the Package Template page. Add new components or remove any default components from the package model for the employee.

Create components using the Package Component Table pages.

From and To Dates

Indicates the period for which the component is effective. These dates default from the Package Start Date and the Package End Date you entered on the Package Model page; you can change them to reflect the correct effective period. The dates for a component must be within or equal to the package start and end dates.

When you are modelling packages for employees, you might need to indicate that components are not effective for the entire period of the package. This could be because one of the attributes or details of the component changed during the course of the package or simply because the component no longer exists. Use the component from and to dates to represent either scenario.

To reflect the change of details, modify the To date for the existing component. The component To date should be the day before the effective-dated change. You can then insert another component into the package. Select the same component, modify the dates to reflect the effective dates of the new details, and enter the component details.

TPV and TEC

These amounts are automatically updated based on the values entered for the components, the additional components, and the calculation method that apply to the component.

Bal (balance)

If you have selected a Package Method of *Top Down* or *Middle Out*, identify a component that should be the default package balance by selecting this check box for the appropriate component. Select only one component to be the balance; it must have a component type of flat amount.

The salary component is the most common component to select as the balance. By selecting this check box for the salary component, the Current TPV and TEC are calculated in the Package Annual Totals group box. The Balance Total TPV/TEC starts at 0 or as close to 0 as rounding allows.

The system calculates the values for the component. For each component, you can see the value of TPV and TEC. These values include values of any additional components. For example, for a salary component, \$90,000 might add to TPV and \$96,300 might add to TEC. The difference in values is the additional component of payroll tax specified for this component.

Note. You don't have to select a component to be the balance for the package. By not selecting a component, the balance is calculated and appears as the detail for each component added. Manually adjust the value of the package components to try to reach a package balance as close to zero as possible.

Dtls (details)

Whether you identify a default balance for the package, enter the component details for all components that have not been calculated.

To enter the component details, click the Dtls button for the component. This accesses a corresponding details page for each component that enables you to enter component details. The details that appear in each details page are determined by the component type you define on the Package Component Table page.

Most of the details are required to support the calculation of the FBT and GST liability, and subsequently, the component value.

The method for calculating the FBT and GST varies based on the tax category, identified by the component type.

Note. Consult the Australian Taxation Office for more information regarding the terms or requirements for calculating tax.

Bud (budget)

Click to enter budget information on the Budget Entry page for each component.

Note. Before you can access the Budget Entry page, enter the component value details in the corresponding details page for each component. If you don't enter any values for a component, the budget amounts are all zero. You must also create a Pay Calendar on the (Salary Packaging) Pay Calendar Table page.

Package Annual Total

This group box enables you to automatically track your package totals based on what you enter in the component details pages.

C/F Target TPV/TEC and Current TPV/TEC

The Package Annual Totals displays the target total TPV/TEC, the current TPV/TEC, and the balance total TPV/TEC. The C/F (carry forward) target TPV/TEC also appears, but it is only relevant when making effective-dated changes to a confirmed package.

As you enter or change figures, the current TPV/TEC values update, and if you have selected the top down or middle out option on the Package Model page, subtract this value from the C/F Target TPV/TEC value.

For example, if you selected a package method of Total Package Value (TPV) on the Package Model page and entered a Target TPV of \$90,000, this amount appears on the Target TPV/TEC and the Balance Total TPV/TEC for the package annual totals. The balance is \$90,000 if you have not entered any component details.

The C/F Target TPV/TEC field populates when an employee changes packages mid-package period. Because package amounts are calculated from the start to end dates, a change midway through that period results in a carry forward amount.

See Also

[Chapter 3, “Setting Up Salary Packaging,” Setting Up Salary Package Components, page 28](#)

[Chapter 4, “Modelling Salary Packages,” Modelling Salary Packages for Applicants, page 57](#)

[Chapter 3, “Setting Up Salary Packaging,” page 13](#)

[Chapter 4, “Modelling Salary Packages,” Entering Package Component Budget Details for Applicants, page 61](#)

[Chapter 4, “Modelling Salary Packages,” Entering Salary Package Component Budget Details for Employees, page 52](#)

[Chapter 4, “Modelling Salary Packages,” Entering Package Component Details, page 49](#)

Entering Package Component Details

When you click the Dtl (detail) button for each corresponding component on the Base Components page, you are presented with one or more pages that enable you to enter component details. Most of the details are required to support the calculation of the Fringe Benefits Tax (FBT) and Goods and Services Tax (GST) liability, and subsequently, the component value. Other pages are used for informational purposes only. The details that appear depend on the component type you select. Different component types require different information, which is reflected in the fields available for entry on each details page.

Note. The details pages that appear when you are entering component details vary. However, if you are familiar with the requirements of the Australian Taxation Office for the details required in the calculation of FBT and GST liabilities, then the fields should be self explanatory. However, there are a number of component types for which the details are not driven by the calculation of FBT. These component types are Home Office Lease, Flat Amount, Percentage of Contributing Components, and Percentage of Benefits Base.

Salary Packaging Details Fields

The following detail fields are consistent across all, or a number of component types, Details pages:

Field	Description
Tax Exemption Amount	Some component types are eligible for a tax exemption based on the rules defined by the Australian Taxation Office. For different component types, a tax-free threshold applies, whereby the taxable value can be reduced before the calculation of the FBT liability. If you are packaging a component that is eligible for the tax free threshold, enter the amount of the tax-free threshold in the Tax Exemption Amount (Annual) field to enable accurate calculation of the FBT liability and the component value.
Tax Adjustment Amount	This is almost the reverse of the Tax Exemption Amount. Where the Tax Exemption Amount reduces the taxable value before the calculation of the FBT liability, the Tax Adjustment Amount increases the component value after the calculation of the FBT liability.
Employee Contribution	Like the Tax Exemption Amount and the Tax Adjustment Amount, the Employee Contribution field appears on most of the Details pages for component details, especially where the component type dictates the calculation of an FBT liability. The Employee Contribution is an amount paid by the employee to the employer as a contribution toward the cost of the benefit. The taxable value of the benefit is reduced by the amount of the contribution.
GST Amount	In the majority of cases, if you have defined GST for the component in the GST Calculation field on the Expense Data page, an additional GST field appears on each of the Details pages. The value you select on the Expense Data page defines how the GST, if any, can be tracked as an expense.

Note. The Details pages prompt for the entry of details to support the calculation of FBT and GST. However, this doesn't mean that FBT and GST liabilities are calculated for the component. For tax liabilities to be calculated for a component, associate an additional component with a type of FBT or GST with the component.

Entering Motor Vehicle General Details

The system uses the following fields on the Motor Vehicle General Details page, Motor Vehicle FBT Operating Cost Details page and Motor Vehicle FBT Statutory Method Details page in the calculation of FBT tax liabilities:

FBT Calculation Method	Drives the calculation of FBT. There are two methods of calculating FBT for a motor vehicle: <i>Statutory Formula:</i> The Motor Vehicle FBT Statutory Method Details page appears. <i>Operating Cost:</i> The Motor Vehicle FBT Operating Cost Details page appears.
Capital Cost	Enter the original value of the vehicle for calculation of FBT.
Estimated Kilometres	To accurately calculate the FBT liability, enter the estimated distance the motor vehicle will travel.

Note. All other fields on this page are for information only.

Entering Car Parking FBT Details

The system uses the following fields on the Car Parking FBT Details page, the Car Parking FBT Market Value Method Details, and Car Parking FBT Commercial Station Method Details pages in the calculation of FBT tax liabilities:

FBT Calculation Method	There are two different methods of calculation for the FBT liability on a car parking benefit: <i>Market Value:</i> The Car Parking FBT Market Value Method Details page appears, enabling you to enter and calculate FBT details according to the market value of the car park, when the car parking is leased on the employee's behalf or on the employer's site. <i>Commercial Parking Station:</i> The Car Parking FBT Commercial Station Method Details page appears, enabling you to enter and calculate FBT details when the car parking is a paid for as an ongoing, daily benefit through a parking station for the employee. After you select a method and click OK, another page appears and prompts for other details related to the component.
Market Value (annual)	Enter the estimated market value of the car parking. For example, an employer pays Star's Property Management \$3,000 per year for the leasing of the car park on the employee's behalf. An independent evaluation of the market value of the car park has been quoted at \$2,200. The employer wants to pass on the total cost of the car park to the employee. When calculating the FBT on the car park component, tax is payable only on the market value of the car park—in this case \$2,200. The employee makes no contribution for the benefit and no tax exemption applies. In the Tax Adjustment Amount (Annual) field, enter \$800, which is the difference between the market value and the cost to the employer.

When the value of the component and additional components are calculated, the value of the \$2,200 is used in the calculation of tax, but the value of the base component (not including additional component values) is \$3,000. By using the tax adjustment amount, you can accurately calculate the tax on the car park and ensure that the full cost of the car park is passed on to the employee in the form of an increased component value.

See Also

Chapter 3, “Setting Up Salary Packaging,” Setting Up Salary Package Components, page 28

Chapter 4, “Modelling Salary Packages,” Entering Package Component Budget Details for Applicants, page 61

Chapter 4, “Modelling Salary Packages,” Entering Salary Package Component Budget Details for Employees, page 52

Entering Salary Package Component Budget Details for Employees

Access the Budget Entry page.

Budget Entry

Period End	Budget	Actual
14/12/2002	5326.64	
14/01/2003	5326.64	
14/02/2003	5326.64	
14/03/2003	5326.64	
14/04/2003	5326.64	
14/05/2003	5326.64	
14/06/2003	5326.64	
14/07/2003	5326.64	
14/08/2003	5326.64	
14/09/2003	5326.64	
14/10/2003	5326.64	
14/11/2003	5326.67	

Current Total: 63919.71
Total Req'd: 63919.71
Remainder:

Budget Entry page

Period End

The default budget assumes a regular rate of expenditure for each period end (pay period) in the package period. The pay periods are determined using

the employee's pay group and the applicable salary packaging pay calendar records in PeopleSoft Global Payroll. For any partial periods, the amount budgeted is pro-rated to reflect the value applicable for the partial period.

Budget and Actual

You can update and modify budget values by pay period. You cannot insert or delete budget period rows. All pay periods within the effective period of the component appear. To budget into further pay periods, change the component from and to dates for the component on the Employee Salary Package component.

The page also displays actual expenditure against the component. This information is available only after you run the Package Expense process.

Note. Before you open the Budget Entry page, enter the component value details in the corresponding details page. If you haven't entered any values for a component, the budget amounts are all zero.

You can set up a budget for the planned expenditure of a component. If you don't enter specific budget information, the system assumes that the expenditures will be made on a regular basis—calculating an equal amount to expend for each pay period.

Current Total, Total Req'd (total required), and Remainder

Track your progress against the budget throughout the package year by referring to the Current Total, Total Req'd, and Remainder fields that appear at the bottom of the page. While the system defaults the budget amounts so that they are evenly spread across the budget period, you can change the values for each period. However, all of the periods must add up to the totals. If they do not, and you attempt to close the page, the system displays a warning message and you cannot close the page until you correct the error.

The budget total is automatically updated and appears after every entry on the Budget Entry page.

See Also

[Chapter 4, "Modelling Salary Packages," Setting Up Annual Base Components for Employees, page 46](#)

[Chapter 4, "Modelling Salary Packages," Setting Up Annual Base Components for Applicants, page 61](#)

Viewing Annual Additional Salary Package Components for Employees

Access the Additional Comp page.

Package Model		Base Components		Additional Comp		Base Comp (Per)		Addtnl Comp (Per)		Salary/Tax	
Evers,Nicole Christine						ID: KA0012		Empl Rcd#: 0			
Package Definition Find View All First 1 of 1 Last											
Effective Date: 15/11/2002		Model Number: 0		Package Status: Proposed							
Package Components Find View All First 1 of 2 Last											
Component: SALARY		Salary Component				<input checked="" type="checkbox"/> Add to Gross Pay					
Additional Components Find View All First 1 of 1 Last											
SALPRT		Sal PRT		Type Payroll Tx		Amount 4096.00		Adds To TPV		Adds To TEC 4096.00	
Base Component Amount TPV/TEC:						64000.00		64000.00			
Component Total TPV/TEC:						64000.00		68096.00			
Package Total											
Current TPV/TEC:						70400.00		74905.60			
C/F Target TPV/TEC:											

Additional Comp page

Package Components

Add To Gross Pay

This check box is selected if you also selected it on the Base Component page. It enables you to identify components to include in the notional calculation of Pay As You Go tax liabilities. At the time of modelling, the value of components with the Add to Gross Pay check box selected are aggregated and the Pay As You Go tax liability is calculated on the total. Typically select this check box for components representing cash payments (such as salary and allowances).

Base Component Amount TPV/TEC and Component Total TPV/TEC

Totals appear for the base component amount for both TPV and TEC, the amount entered on the Base Components page, and the component total, which is the base plus additional components.

The base component amount represents the value of the component independent of any additional liabilities.

The component total TPV/TEC adds the additional component values and the base component amount to give a total cost of the component as it effects TPV and TEC.

Additional Components

This group box displays all the additional components and amounts that have been calculated for each of the components. There are three totals available for individual additional components.

Type	For each component, additional components may exist for FBT, GST, and payroll tax. This information appears here.
Adds To TPV and Adds To TEC	Controlled by the set up of the additional component, where you specify if the additional component Adds To TPV or TEC. For example, the calculated FBT liability for a car parking component might be \$2,216.94. This appears in both the Adds to TPV and Adds to TEC fields. All values adding to TPV add to TEC (the TEC is inclusive of all TPV values). The payroll tax liability might be calculated as \$164.78. This value appears only under the Adds to TEC field because the component definition indicates the package level for this additional component to be TEC (which means it has no effect on TPV).

Package Totals

Current TPV/TEC / C/F Target TPV/TEC	These totals are consistent with those shown on the Base Components page, identifying the target and current total for TPV and TEC.
---	---

See Also

[Chapter 3, “Setting Up Salary Packaging.” Setting Up Additional Salary Package Components, page 26](#)

[Chapter 3, “Setting Up Salary Packaging.” Setting Up Salary Package Components, page 28](#)

Setting Up Period Base Components for Employees

Access the Base Comp (Per) page.

The Base Comp (Per) page operates almost the same as the Base Components page. These pages enable you to enter the components and the component details for the employee’s package. There is, however, one important difference.

On the Base Components page, the value of the individual components and the package indicate annual amounts, while the Base Comp (Per) page indicates the values for the effective period of the package or component.

For example, if an employee receives a salary of \$50,000 per year, but is only employed for three months, that employee’s remuneration is generally described as \$50,000 per annum, not \$12,500 for three months. In the Base Components page, this amount is reflected as \$50,000. In the Base Comp (Per) page, the value appears as \$12,500 for the package or component period reflecting the three-month period.

Note. Because the process of entering components and component details is the same in the Base Components page, all common fields and functionality are discussed in the Base Components page discussion.

See Also

[Chapter 4, “Modelling Salary Packages.” Setting Up Annual Base Components for Employees, page 46](#)

[Chapter 4, “Modelling Salary Packages.” Setting Up Annual Base Components for Applicants, page 61](#)

[Chapter 4, “Modelling Salary Packages.” Setting Up Period Base Components for Applicants, page 62](#)

Viewing Additional Period Components for Employees

Access the Addtnl Comp (Per) page.

The Addtnl Comp (Per) page appears and operates almost the same as the Additional Comp page. The difference is that the Addtnl Comp (Per) page displays the additional component values (expressed as part year values, depending on the start and end dates of the components when the salary package period is not an annual period). The values that appear reflect the amounts for the effective period of the package or component.

Note. Because the fields are identical in the Additional Comp page, all common fields and functionality are discussed in the Additional Comp page discussion.

See Also

[Chapter 4, “Modelling Salary Packages,” Viewing Period Additional Salary Package Components for Applicants, page 62](#)

[Chapter 4, “Modelling Salary Packages,” Viewing Annual Additional Salary Package Components for Employees, page 53](#)

[Chapter 4, “Modelling Salary Packages,” Viewing Annual Additional Salary Package Components for Applicants, page 61](#)

Viewing Package Component PAYG Tax Liabilities for Employees

Access the Salary / Tax page.

Base Components | Additional Comp | Base Comp (Per) | Addtnl Comp (Per) | **Salary/Tax**

Evers, Nicole Christine ID: KA0012 Empl Rcd#: 0

Salary Details Find | View All First 1 of 1 Last

Effective Date: 15/11/2002 **Model Number:** 0 **Package Status:** Proposed

Tax Scale: 7

	Gross Salary	Tax	Net Salary
Yearly	64000.00	18455.40	45544.60
Monthly	5333.33	1537.95	3795.38
Semi-monthly	2666.67	768.97	1897.69
Fortnightly	2461.54	709.82	1751.72
Weekly	1230.77	354.91	875.86

Salary/Tax page

Salary Details

Salary Based on the package tax scale that you selected on the Package Model page, the system calculates the employee's Gross Salary, Tax (liability), and take-home (Net Salary) for each of the following pay frequencies:

- *Yearly*
- *Monthly*
- *Semi-monthly*
- *Fortnightly*
- *Weekly*

Note. This tax calculation does not take into account any tax rebates or rounding in calculating the tax liability and is used only as an estimate of the eventual tax liability. Because it is possible to vary payments through the payroll, and the payments might alter either the Gross Salary or the Tax amounts, these figures are not regarded as an exact reflection of payments that are made through PeopleSoft Global Payroll.

See Also

[Chapter 4, “Modelling Salary Packages,” Defining Employee Salary Package Details, page 43](#)

Modelling Salary Packages for Applicants

If you have been tracking and administering job applicants through the Recruiting feature in PeopleSoft Human Resources, you don't have to re-enter all of the information you've already entered in the system when you hired an applicant. After the applicant is hired and you have created the applicant's package, copy the applicant's ID over to an employee ID using the Appl to Empl Copy page in the Recruiting menu and view the package details using the Employee Salary Package pages.

You have the option of using the Recruit Workforce - AUS Applicant Salary Package component to track any remuneration offers that you make to applicants as part of your negotiations. Only employees can have packages with a package status of current or history. Applicant package status is always set to *proposed*.

Note. The Applicant Salary Package component is similar to the Employee Package Model component. The functions are the same with some exceptions: the checking against any employee job and employee tax records doesn't occur. Because the person is an applicant, these records do not yet exist. One difference is the start date. In applicant package modelling, the start date defaults to the package model effective date. Variation exists when defining the packaging options because an applicant does not have a job record from which to default package and tax information.

In this section, we discuss how to:

- Understand how applicant package modelling fits into recruitment.
- Define applicant salary packages.

- Set up annual base components for applicants.
- Enter package component budget details for applicants.
- View annual additional salary package components for applicants.
- Set up period base components for applicants.
- View period additional salary package components for applicants.
- View package component PAYG tax liabilities for applicants.

See Also

[Chapter 4, “Modelling Salary Packages,” Modelling Salary Packages for Employees, page 42](#)

[Chapter 5, “Managing Salary Packages,” Confirming Salary Packages for Applicants on Hire, page 66](#)

[Chapter 3, “Setting Up Salary Packaging,” Setting Up Salary Package Components, page 28](#)

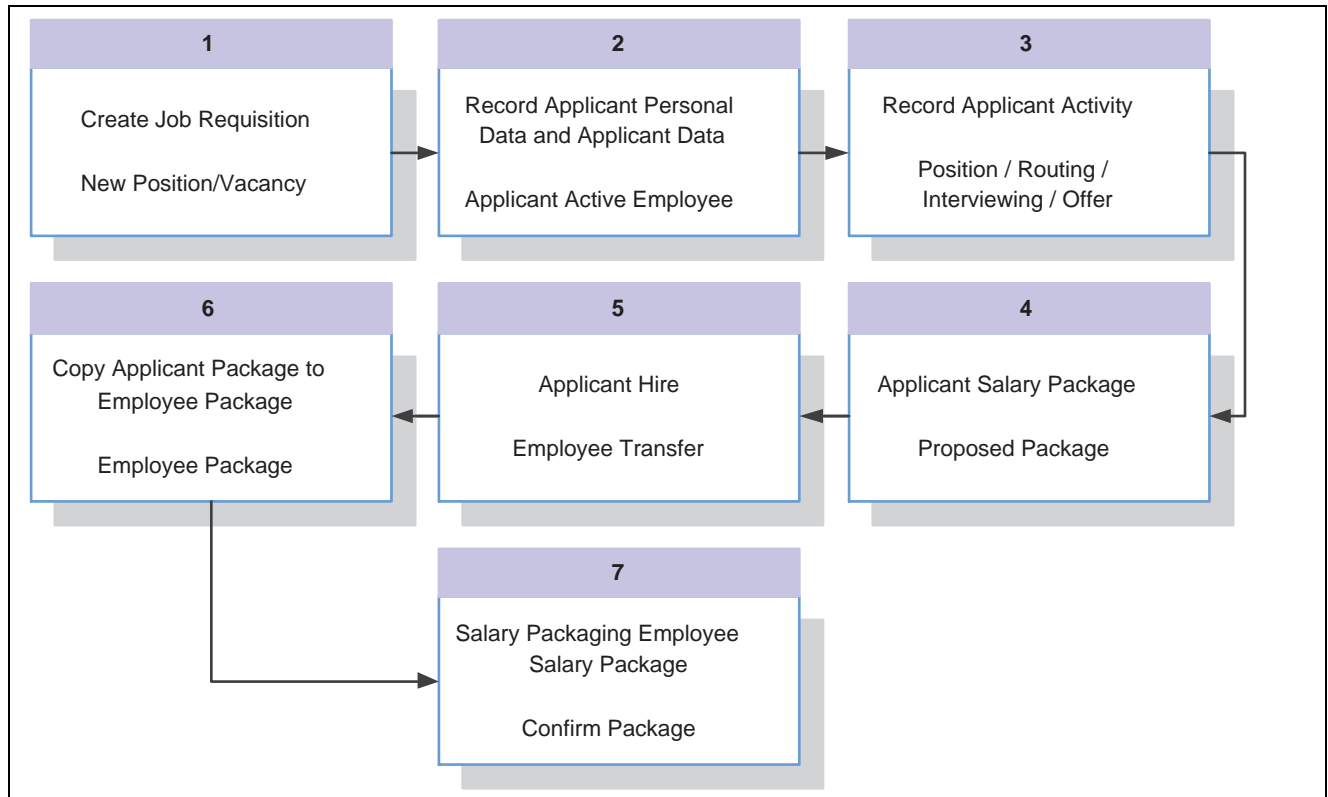
[Chapter 4, “Modelling Salary Packages,” Entering Package Component Details, page 49](#)

Pages Used to Model Salary Packages for Applicants

Page Name	Object Name	Navigation	Usage
Applicant Model	PKG_MDL_TBL_APP	Recruiting, Identify/Process Applicants, Applicant Salary Pkg Model AUS, Applicant Model	Record applicant salary packages.
Base Components	PKG_MDL_BSE_CM_APP	Recruiting, Identify/Process Applicants, Applicant Salary Pkg Model AUS, Base Components	Enter base component details that drive package value calculations on an annual basis for applicants.
“Addnl (additional)” Components	PKG_MDL_ADD_CM_APP	Recruiting, Identify/Process Applicants, Applicant Salary Pkg Model AUS, Additional Components	View the additional component values (for applicants) (expressed as an annual value) associated with the prior page.
Base Comp (Per) (base compensation period)	PKG_MDL_BSE_PE_APP	Recruiting, Identify/Process Applicants, Applicant Salary Pkg Model AUS, Base Comp (Per)	Enter base component details (for applicants) that drive package value calculations on a prorated basis—in other words, the actual value of the component for the period for which it is effective.
Addnl Comp (Per) (additional compensation period)	PKG_MDL_ADD_PE_APP	Recruiting, Identify/Process Applicants, Applicant Salary Pkg Model AUS, Addnl Comp (Per)	View the additional component values for applicants (expressed as part year values, depending on the start and end dates of the components) associated with the prior page.
Salary/Tax	PKG_MDL_SAL_NT_APP	Recruiting, Identify/Process Applicants, Applicant Salary Pkg Model AUS, Salary/Tax	View the impact to the applicant’s salary and tax obligations based on the package model.
Budget Entry	PKG_MDL_BUDGET_APP	Recruiting, Identify/Process Applicants, Applicant Salary Pkg Model AUS, Budget Entry	Set up a budget for the planned expenditure of a component for applicants. Accessed by clicking the Bud button on the Base Components page.

Understanding How Applicant Package Modelling Fits into Recruitment

The following diagram represents an overview of the recruitment process and how you can use applicant salary package modelling in your recruiting efforts.



How applicant package modelling fits into your recruitment business process

Defining Applicant Salary Packages

Access the Applicant Model page.

Note. Most of the information on this page is identical to the information on the Employee Package Model page. This discussion highlights only the differences. No job record or payroll data exists for information to default from, so you need to enter data.

Package Definition

Package Status

Always *Proposed* for applicants. You can't confirm or enroll packages for applicants. The applicant would need to be hired, and then have the package confirmed and enrolled through the Employee Packaging pages.

Company

The company with the vacant position or job.

Tax Scale and Payroll Tax State

These values are used in the calculation of gross to net income figures and payroll tax liabilities. However, if the applicant is not an employee, enter these values or select from the list of valid values.

Job Code

The job code from the job requisition, which ensures that when modelling you are using the same defaults and rules that apply to the job for employees. The job code is not saved with the applicant model. It is used only to initialize the Template and Rule ID fields.

See Also

[Chapter 4, “Modelling Salary Packages,” Defining Employee Salary Package Details, page 43](#)

[Chapter 4, “Modelling Salary Packages,” Modelling Salary Packages for Employees, page 42](#)

[Chapter 5, “Managing Salary Packages,” Confirming Salary Packages for Applicants on Hire, page 66](#)

Setting Up Annual Base Components for Applicants

Access the Base Components page.

Note. Set up salary package model information for applicants using the Applicant Salary Package component in the same way that you set up salary package model information for employees (using the AUS Applicant Sal Package component). All of the information on this page is identical to the information on the Base Components page for employees.

See Also

[Chapter 4, “Modelling Salary Packages,” Setting Up Annual Base Components for Employees, page 46](#)

Entering Package Component Budget Details for Applicants

Access the Budget Entry page.

Note. Set up salary package model information for applicants using the Applicant Salary Package component in the same way that you set up salary package model information for employees (using the AUS Applicant Sal Package component). All of the information on this page is identical to the information on the Budget Entry page for employees.

See Also

[Chapter 4, “Modelling Salary Packages,” Entering Salary Package Component Budget Details for Employees, page 52](#)

Viewing Annual Additional Salary Package Components for Applicants

Access the Addnl Components page.

Note. Set up salary package model information for applicants using the Applicant Salary Package component in the same way that you set up salary package model information for employees (using the AUS Applicant Sal Package component). All of the information on this page is identical to the information on the Addtnl Comp (Per) page for employees.

See Also

[Chapter 4, “Modelling Salary Packages,” Viewing Annual Additional Salary Package Components for Employees, page 53](#)

Setting Up Period Base Components for Applicants

Access the Base Comp (Per) page.

Note. Set up salary package model information for applicants using the Applicant Salary Package component in the same way that you set up salary package model information for employees (using the AUS Applicant Sal Package component). All of the information on this page is identical to the information on the Base Comp (Per) page for employees.

See Also

[Chapter 4, “Modelling Salary Packages,” Setting Up Period Base Components for Employees, page 55](#)

Viewing Period Additional Salary Package Components for Applicants

Access the Addnl Comp (Per) page.

Note. Set up salary package model information for applicants using the Applicant Salary Package component in the same way that you set up salary package model information for employees (using the AUS Applicant Sal Package component). All of the information on this page is identical to the information on the Addnl Comp (Per) page for employees.

See Also

[Chapter 4, “Modelling Salary Packages,” Viewing Additional Period Components for Employees, page 56](#)

Viewing Package Component PAYG Tax Liabilities for Applicants

Access the Salary / Tax page.

Note. Set up salary package model information for applicants using the Applicant Salary Package component in the same way that you set up salary package model information for employees (using the AUS Applicant Sal Package component). All of the information on this page is identical to the information on the Salary/Tax page for employees.

See Also

[Chapter 4, “Modelling Salary Packages,” Viewing Package Component PAYG Tax Liabilities for Employees, page 56](#)

Copying Applicant Salary Packages to the Employee Salary Package Component

After you have hired an applicant and created the applicant’s salary package, you copy the salary package and applicant ID over to the Employee Salary Package component using the Appl to Empl Copy page in the Recruit Workforce menu. This enables you to then view and confirm the applicant’s package details as an employee.

In this section, we discuss how to copy applicant salary packages to employees.

Pages Used to Copy Applicant Salary Packages to the Employee Salary Package Component

Page Name	Object Name	Navigation	Usage
Appl to Empl Copy (applicant to employee copy)	PKG_APP_CPY	Recruiting, Hire Applicants, Prepare for Hire, Copy Applicant to Employee AUS.	Copy applicant salary packages over to the Employee Salary Package component. The Copy to Employee ID is the ID you created when the applicant was hired. When you select the Confirm Copy check box, the applicant's ID and salary package are copied over to the Employee Salary Package component. This enables you to then view and confirm the applicant's package details as an employee.

See Also

[Chapter 5, "Managing Salary Packages," Confirming Salary Packages, page 66](#)

CHAPTER 5

Managing Salary Packages

This section provides an overview of the management of salary packages for Australia and discusses how to:

- Confirm salary packages.
- Enrol salary packages.
- Review salary packages.
- De-enrol salary packages.
- Make effective-dated changes to salary packages.
- Run Salary Packaging reports.

Understanding Managing Salary Packages

After modelling a salary package for an employee, confirm and enrol the package to facilitate payments through PeopleSoft Global Payroll.

This simple, two-step process establishes all compensation records for an employee's confirmed package. If details of employee's package change during the package year, you can change either the components or the component details in the package by making effective-dated changes to the package.

Note. If you are not using PeopleSoft Global Payroll, you can still enrol salary packages to track compensation. Enrolment creates compensation records for the employee on the employee's Job Data Compensation page based on the components in the employee's confirmed package. This information facilitates payments and expense tracking. If you are not using PeopleSoft Global Payroll, you can't track expenditure against the package using the Package Expense Summary page.

See Also

[Chapter 5, "Managing Salary Packages," Confirming Salary Packages, page 66](#)

[Chapter 5, "Managing Salary Packages," Enrolling Salary Packages, page 67](#)

PeopleSoft 8.8 Global Payroll for Australia PeopleBook, "Monitoring Salary Packaging Expenditure for Australia," Reviewing Salary Package Expenditures

Common Elements Used in This Chapter

Package Enrolment

This process enrolls compensation rates on the Job Data Compensation page for all employees with a confirmed package. This process saves

you the administrative overhead of updating each of the employee's records after a package has been confirmed.

De-enrolment

The process of removing an employee from a salary package.

Confirming Salary Packages

When you have completed the modelling process and the employee has selected a package, confirm the selection online to identify the package against which payments should be made. Approving or confirming a modelled package is the last phase prior to enrolling the employee into the salary package.

As each employee chooses a package, identify the selected package by selecting the Confirmed check box on the Package Model page in the Salary Package component. After the package is confirmed, run the Package Enrolment process to enrol the employee based on the components in the package—Compensation, Salary Packaging AUS, Create Salary Packaging, Enroll Salary Package.

Note. After a package has been confirmed, the package status remains as *proposed*. This means that the employee has made a selection but has not yet been enrolled into the package. After the enrolment process is complete, the package status is updated to *current* and payments are made in accordance with the package components.

See Also

[Chapter 4, “Modelling Salary Packages,” page 41](#)

[Chapter 5, “Managing Salary Packages,” Enrolling Salary Packages, page 67](#)

[Chapter 5, “Managing Salary Packages,” De-enrolling Employees from Salary Packages, page 71](#)

Confirming Salary Packages for Applicants on Hire

If you have been tracking and administering job applicants through the Recruitment feature of PeopleSoft Human Resources, when you hire applicants you don't have to re-enter all of the information you've already entered into the system. The information becomes part of the employee record after you copy the details over to the Employee Salary Package component using the Appl to Empl Copy page in the Recruiting menu—Recruiting, Hire Applicants, Prepare for Hire, Copy Applicant to Employee AUS. This includes any salary package model that was completed through the Applicant Salary Pkg Model AUS component.

Because you can't confirm applicant package models, you must confirm the employee's selected package at the time of hire and then complete the Package Enrolment process as you would for other employees.

To model salary packages for job applicants that you are tracking in the Recruitment process, use the Applicant Salary Pkg Model AUS component.

Note. You can't confirm salary packages in the Recruiting menu. You must first hire the applicant, copy the applicant's package to the Employee Salary Package component, and then confirm the package in the Salary Packaging AUS menu.

See Also

[Chapter 4, “Modelling Salary Packages,” Copying Applicant Salary Packages to the Employee Salary Package Component, page 62](#)

[Chapter 4, “Modelling Salary Packages,” Modelling Salary Packages for Applicants, page 57](#)

Enrolling Salary Packages

The Package Enrolment process creates compensation rates on the Job Data - Compensation page for all employees with a confirmed package. This process saves you the administrative overhead of updating each of the employee’s records after a package has been confirmed.

You can run the package enrolment process for individual employees or for a pay group. Regardless of the selection criteria, enrolments are only completed for confirmed packages with a status of *proposed*.

When enrolling employees, the system identifies the relevant payroll information from the component definitions. Each component and additional component has a compensation rate code attached. The system uses this information to enrol employees.

Pages Used to Enrol Salary Packages

Page Name	Object Name	Navigation	Usage
Package Enrolment	RUNCTL_PKG001	Compensation, Salary Packaging AUS, Create Salary Packaging, Enroll Salary Package.	Run the Package Enrolment process. To run the Package De-enrolment process navigate to Compensation, Salary Packaging AUS, Create Salary Packaging, De-Enroll Salary Package. The two pages are identical.

Initiating Salary Package Enrolment

Access the Package Enrolment page.

Package Enrolment

Run Control ID: GN3 [Report Manager](#) [Process Monitor](#) Run

Report Request Parameters

By Employee ID **By Pay Group**

Selection Criteria

EmplID: Evers,Nicole Christine **Empl Rcd#:**

Pay Group:

Package Enrolment page

When enrolling an employee through salary packaging for the first time, the rate codes on the employee's Job Data - Compensation page are replaced with all of the salary packaging rate codes (unless the original rate code is *not* flagged as Maintained by Salary Packaging).

If the employee has been packaged before, and you are enrolling a package because of review or an amendment, then the enrolment process treats the package as a new package. All salary packaged flagged compensation rate codes are deleted and new codes inserted.

Note. Regardless of the selection criteria, the package enrolment process is completed for only *confirmed* packages.

You can see the result of the package enrolment process by viewing the impacted employee's job data record before and after running the enrolment process.

The Job Data - Compensation page displays the employee's compensation rate. It also indicates the source of the record with the Salary Packaged check box. If the record was not created by the package enrolment process, the Salary Packaged check box clears.

After you have run the package enrolment process, both the action/reason code and the Salary Packaged check box indicate that a salary packaging process inserted this record.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce," Entering Employee Compensation Information

Reviewing Salary Packages

Salary Packages are generally effective for a year and subsequently subject to annual review. Regardless of the period of the package, it is necessary to review the package near the end of its effective period and establish a new package. Reviewing a package involves:

- Reconciling the expenditure against the package.
- Remodeling where necessary.
- Confirming and enrolling the new package for payment.

Most organisations align their employee package reviews with the calendar using the calendar year, the tax year, or the financial year to determine the review cycle. This makes it easy to remember when employee packages are due for review.

However, you might align an employee's package with the employee's service or some other anniversary. This could mean that review periods are not consistent across your employee population. To handle this situation, run the Packages Due for Review report to identify any employee whose package is due for review in a specified period.

In this section, we discuss how to:

- Identify salary packages due for review.
- Remodel the employee's salary package.

Identifying Salary Packages Due for Review

View the review date for each employee package on the Package Model Table page in the Employee Salary Package component. The review date defaults when modelling the package. The default is for the review date to equal the package end date. Override this value if necessary. You can run the Packages Due for Review report to identify all employees who have salary packages due for review.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "PeopleSoft Application Fundamentals for HRMS Reports," Administer Salary Packaging Reports

Remodelling the Employee's Salary Package

Before you can remodel an employee's package, reconcile the expenditure against the existing package. In this section, we discuss both processes:

- Reconciling expenditure.
- Remodeling the salary package.

Reconciling Expenditure

You should understand the expense calculation process and the package summary information before attempting to reconcile a package. At the package period end date, employees may have overspent or underspent their budgeted package entitlements. Before modelling a subsequent package, reconcile the differences.

When reconciling a package, you can deal with the differences in a number of ways. For a package that is overspent, you recover the difference as an overpayment or reduce the value of the subsequent package. Similarly, you can pay out underspent components or include the value in the subsequent package. The method of reconciling the differences varies from organisation to organisation.

Any action taken to pay or recover differences at the end of the package year should be made through the payroll. Any adjustment to subsequent packages can be in the form of adjusted values for existing components or by defining a separate component to track the adjustment.

Remodeling the Salary Package

When you have identified the employees requiring package review, remodel their packages. This process can be as simple as inserting a new effective-dated package and confirming and enrolling the package, or it can be far more complex. The complexity depends on the changes to the employee's package.

To remodel a salary package for an employee:

1. Open the current salary package and insert a new row.

When you insert a new package, all of the current details from the current package are defaulted, including the component details. The component from and to dates default to the package start and end dates. Components with an end date in the current package, which is prior to the start date of the new package, do not default from the current package because they are already ended.

2. To remodel for the employee, ensure that the effective date of the package is outside the package start and end dates for the existing package.

If the effective date is between the package start and end dates, it is regarded as an effective-dated change to the existing package rather than a new package model.

A new package model resets package expenditure and reinitialises the component from and to dates (to match the package start and end dates). An effective-dated change does not reset package expenditure or reinitialise the from and to dates.

3. Change any of the package details at the package or component level.

The package balance is recalculated based on the changes you make. If, however, you change the template ID used for the package, all package details are cleared and you must repackage all of the details for the employee.

If you have not modified the template ID for the employee, all of the package details are retained. Because changes are likely to be minor (such as an increase in the salary component or minor adjustment to other components), using the details of the employee's current package is the most efficient method of repackaging.

Check some package component details when repackaging on review. These details include estimated distance travelled for a motor vehicle component or other component, as well as details that can change year to year that are not evident in the package display.

4. After you enter the new package details, confirm and enrol the package.

Note. If you are tracking expenditures for packages, run the package expense calculation before remodeling the package. This ensures that the final expenses have been recorded against the package.

See Also

PeopleSoft 8.8 Global Payroll for Australia PeopleBook, “Monitoring Salary Packaging Expenditure for Australia”

[Chapter 5, “Managing Salary Packages,” Enrolling Salary Packages, page 67](#)

De-enrolling Employees from Salary Packages

Sometimes it is necessary to de-enrol employees from salary packaging. You might have areas of your organisation that are administered through salary packaging and other areas that have salary- or hourly-based employees with no other packaged benefits. If this is the case, employees are likely to move from one area of the organisation to another.

To remove an employee from a salary package, update the employee’s salary package record with a package end date and de-enrol the package. Review the employee’s job data to ensure accurate payments under the conditions of the new position.

You might need to reconcile expenditure against the package before completing the de-enrolment and adjust any components over or underspent.

Note. Always run the expense calculation process before de-enrolling the employee from the package.

See Also

PeopleSoft 8.8 Global Payroll for Australia PeopleBook, “Monitoring Salary Packaging Expenditure for Australia”

[Chapter 5, “Managing Salary Packages,” Enrolling Salary Packages, page 67](#)

Initiating Salary Package De-enrolment

To access the Package De-enrolment page and run the Package De-enrolment process, navigate to Compensation, Salary Packaging AUS, Create Salary Packaging, De-Enroll Salary Package. This page is identical to the page used to run the Package Enrolment process.

Before you can run the Package De-enrolment process, indicate that the package is to be de-enrolled and review the package end date on the Package Model page.

The package de-enrolment process updates the job record with a new effective-dated row. The new Job Data record has an effective date that is the day after the package end date. The action/reason indicates that it is a De-enrol Salary Package record.

No change is made to the compensation rate when de-enrolling an employee from salary packaging. Review the job data details, especially the compensation rate, to ensure that the details of the new job or conditions are accurate.

Note. Regardless of the selection criteria, the system de-enrolls only those packages with the De-enrolment check box selected and a current package end date on the Package Model page in the Salary Package component.

See Also

[Chapter 5, “Managing Salary Packages,” Enrolling Salary Packages, page 67](#)

[Chapter 4, “Modelling Salary Packages,” Defining Employee Salary Package Details, page 43](#)

Making Effective-Dated Changes to Confirmed Salary Packages

Details in a package may change during the course of the package period. The employee might choose to discontinue a package component, or the details of a component might change because of legislation or company policy. You can reflect these changes as effective-dated changes to a package.

If you know of these changes at the time of modelling the package for the employee, it is possible to use the component from and to dates to reflect the changes.

If you do model the package to reflect changes in component details during the course of the package, the package enrolment process recognises these changes and inserts multiple records for the respective benefit, deduction, or payroll data. This ensures that accurate payments can be made without further intervention.

If, however, you do not know about changes immediately, and you have to change details later in the year, you can simply enter an effective-dated change. After you confirm and enrol the change, it is administered through payroll, in accordance with the new package details.

To make an effective-dated change to an employee package:

1. Access the current salary package by using the Package Model page in the Employee Salary Package component.
2. Insert a new effective-dated row.
3. Modify the effective date to indicate the effective date of the change you are making.

The effective date controls whether you are making a change to an existing package or model a new package.

4. If you are making an effective-dated change to an existing package, the effective date must be between the package start and end dates of the existing package.
5. If you make an effective-dated change where the effective date is equal to the effective date of a package that is already confirmed, use the model number to show that this is a later change.

By incrementing the model number to any number higher than the confirmed model, the new record is recognised as a later change for that effective date.

This section discusses how to:

- Change existing packages and model new packages.
- Work with budgets and the carry forward amounts.

Changing Existing Packages and Model New Packages

The difference in process between remodelling for an employee and making an effective-dated change in a package is subtle. Essentially, the only difference is whether the new effective date is within or outside the package period for the existing package.

Despite the subtlety in process, the business impact is more dramatic. Modelling a new package for an employee, on review or for any other reason, means that all expenditure values are reset. This means that when you next look at the Expense Summary process, it reflects only expenditures since the new model was enrolled and payments were made against that package.

When you make an effective-dated change to a package, the expenditure details for the package to date are retained. If you are viewing details of this package through the Expense Summary pages, you can see expenditure information for all components within the package period—regardless of whether they were before or after the effective-dated change. This enables you to see a complete history of the package, including the detail changes.

All of the package and component details default from the previous package, except for components that had an end date earlier than the effective date of the current package. Now you can change any of the component details, including the component dates, or add new components to fit your needs.

See Also

PeopleSoft 8.8 Global Payroll for Australia PeopleBook, “Monitoring Salary Packaging Expenditure for Australia”

Working With Budgets and the Carry Forward Amounts

The Base Components and Base Comp (Per) pages include a carry forward (C/F) amount C/F TPV/TEC that you use to ensure the accuracy of the package values when making effective-dated changes to the package. The adjustment amount ensures that the package total is correct, regardless of the timing and the type of effective-dated changes to the package.

The carry forward amount is important if you have used the budget capabilities to calculate the expected expenditure of components. The amount represents the difference between the pro-rated value of the package (up to the effective date of the change) and the budgeted value of the package for the period.

For example, you package a component that represents an employee’s bonus payment. The calculated value of the component is \$10,000. You know that you pay bonuses only once a year in February. When budgeting this component, you can identify that the \$10,000 is attributable to the February pay period. To ensure data integrity, you must ensure that the amount budgeted and the component value are equal.

When you define the budget, it has no effect on the expenditure of the component. Expenditure is controlled through the payroll enrolments (which assume a regular rate of expenditure) and any overrides done through payroll.

If you then make an effective-dated change to the package, recognise the budget you have set and adjust the package values accordingly.

For example, an employee has a package that is effective for a year, from July 7, 2000, to June 6, 2001. The package was modelled from the top down with the Total Employment Cost (TEC) set to \$120,000. The Total Package Value (TPV) was calculated to be \$85,000.

Without budgeting, you would have assumed a regular rate of expenditure of \$10,000 per month, based on the TEC of \$120,000. In this situation, any effective-dated change that is made two months into the package would assume \$20,000 has been expended and calculate the package values accordingly. This means that for the remainder of the package, the employee has \$100,000 left to expend.

By using budgeting, you can ensure that the package better reflects the real world. Because of putting money aside for holidays, bonuses paid only annually, and any other possible variables, it is likely that the rate of expenditure will be irregular. In the real world, it may be that \$75,000 of the TEC is budgeted in the first six months of the package and \$45,000 in the last six months.

In this situation, it is necessary to adjust the package value to reflect any irregularities in expenditure.

Taking the example a little further, we created a package with values of \$120,000 TEC and \$85,000 TPV. We budgeted to spend \$75,000 evenly over the first six months and \$45,000 in the last six months. We make an effective-dated change to the package after two months. This change does not alter the TEC or the TPV but rather modifies various component details. Based on the budget, we want the employee to spend only \$95,000 over the remaining 10 months of the package. This is because the employee was budgeted to have spent \$25,000 in the first two months.

When calculating the package values, we need to adjust the package by \$5,000. This amount is the difference between the prorated value of the package (up to the effective date of the change) and the budgeted value of the package for the period.

Here is the calculation of the prorated value of the example package:

$$\$120,000 / 12 \text{ (months in year)} \times 2 \text{ (months elapsed)} = \$20,000$$

The budgeted value of the package for the period is \$25,000 (assuming a regular rate of expenditure on the \$75,000 budgeted in the first six months). This value is extracted from the details stored against the package.

The difference between the two is \$5,000. This value represents the amount of the package that was budgeted before it would have been entitled, or in arrears if the package was budgeted to spend less early in the year and spend more later in the year. This amount can be seen as the carry forward amount (C/F TPV/TEC) on the effective-dated change to the package.

Note. The adjustment amount doesn't consider actual expenditure. It looks at the value of the package, the period of the package that has already elapsed, and the details entered by the user for the budgeted expenditure for the package.

See Also

[Chapter 4, "Modelling Salary Packages," Entering Salary Package Component Budget Details for Employees, page 52](#)

[Chapter 4, "Modelling Salary Packages," Entering Package Component Budget Details for Applicants, page 61](#)

[Chapter 4, "Modelling Salary Packages," Setting Up Annual Base Components for Employees, page 46](#)

[Chapter 4, "Modelling Salary Packages," Setting Up Period Base Components for Employees, page 55](#)

Running Salary Packaging Reports

Throughout the entire Salary Packaging process there are a number of reports that you can run to help with your package modeling, package reviews and reporting simply on package details. PeopleSoft Human Resources supplies a group of four standard reports to help you manage Salary Packaging.

Pages Used To Run The Salary Packaging Reports

Page Name	Object Name	Navigation	Usage
Packages Due For Review	RUNCTL_PKG003	Compensation, Salary Packaging AUS, Create Packaging Reports, Packages Due for Review.	Generate the Salary Packaging - Models Due for Review report which displays all employees with packages ready for review.
Package Models	RUNCTL_PKG004	Compensation, Salary Packaging AUS, Create Packaging Reports, Package Models.	Generate the Salary Package Model report which enables you to report on an applicant or an employee's salary package.
Package Details	RUNCTL_PKG007	Compensation, Salary Packaging AUS, Create Packaging Reports, Package Details.	Generate the Salary Packaging Package Details report which reports on the amounts budgeted for each component of a package in each pay period.
FBT Reconciliation	RUNCTL_PKG006	Compensation, Salary Packaging AUS, Create Packaging Reports, FBT Reconciliation.	Generate the Salary Packaging FBT Reconciliation report which assists in the reporting of benefits and liabilities to the Australian Taxation Office at the end of the Fringe Benefits Tax Year—March 31. The report includes values calculated during the Package Expense Calculation. To ensure that you get accurate totals included in the FBT Reconciliation report, you must execute the Package Expense Calculation at the end of the FBT Year for which to run the FBT Reconciliation report. You must complete this before running the report.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” Administer Salary Packaging Reports

Glossary of PeopleSoft Terms

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

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

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

data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
data row	Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.
data validation	In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.
DAT file	This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.
delivery method	In PeopleSoft Enterprise Learning Management, identifies a learning activity's delivery method type. An activity can have one or more delivery methods.
delivery method type	In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.
distribution	The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.
double byte character	If you're working with Japanese or other Asian employees, you can enter the employee's name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].
dynamic tree	A tree that takes its detail values 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	Metastings are special expressions included in SQL string literals. The metastings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
objective	In PeopleSoft Enterprise Learning Management, an individual's learning goal. An example of a learning goal is a competency gap.
override	In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.
pagelet	Each block of content on the homepage is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

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

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

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

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

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

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

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

URL

See *uniform resource locator (URL)*.

user interaction object

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

variable

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

warehouse

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

worksheet

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

workflow

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

worklist

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

zero-rated VAT

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

Index

A

- Additional Comp (AUS) page 26, 29, 31, 43, 53
- additional documentation viii
- Addnl Comp (Per) (AUS) page 59
- Addnl Comp (Per) (AUS) page (applicants) 62
- Addnl Components (AUS) page 59, 61
- Addtnl Comp (Per) (AUS) page 43, 56
- Appl to Empl Copy (AUS) page 63
- Applicant Model (AUS) page 58–60
- application fundamentals vii
- AUS FBT Stat Interest (AUS) page 19
- AUS Salary / Tax (AUS) page 56
- Australia
 - Additional Comp (AUS) page 26, 29, 31, 43, 53
 - Addnl Comp (Per) (AUS) page 59
 - Addnl Comp (Per) (AUS) page (applicants) 62
 - Addnl Components (AUS) page 59, 61
 - Addtnl Comp (Per) (AUS) page 43, 56
 - Appl to Empl Copy (AUS) page 63
 - Applicant Model (AUS) page 58–60
 - Base Comp (Per) (AUS) page 43, 55, 59
 - Base Comp (Per) (AUS) page (applicants) 62
 - Base Component (AUS) page 29
 - Base Components (AUS) page 43, 46, 59
 - Base Components (AUS) page (applicants) 61
 - Budget Entry (AUS) page 43, 52, 59
 - Budget Entry (AUS) page (applicants) 61
 - Calculated Comp (AUS) page 29, 32
 - Ern/Ded Included (AUS) page 16, 18
 - Expense Data (AUS) page 29, 34
 - FBT Reconciliation (AUS) page 75
 - FBT Stat Interest (AUS) page 19–22
 - FBT Vehicle Rates (AUS) page 20, 22
 - FBT/GST Rate (AUS) page 20
 - FBT/GST Rate Table (AUS) page 20
 - Package De-enrolment (AUS) page 71
 - Package Details (AUS) page 75
 - Package Enrolment (AUS) page 67
 - Package Model (AUS) page 43
 - Package Models (AUS) page 75
 - Package Rule (AUS) page 37
 - Package Template (AUS) page 36
 - Packages Due For Review (AUS) page 75
 - Pay Calendar Table (AUS) page 16–17
 - Pay Calendar Table (GP) (AUS) page 16
 - Salary / Tax (AUS) page 56
 - Salary / Tax (AUS) page (applicants) 62
 - Salary Packaging
 - budgets carry forward amount 73
 - business processes 1, 5
 - changing confirmed packages 72
 - confirming packages 66
 - copying applicant packages 62
 - de-enrolling 71
 - de-enrolment defined 66
 - default templates and rules 40
 - default TPV and TEC compensation rate codes 39
 - defining applicant packages 58, 60
 - defining calendars 17
 - defining component liabilities 26
 - defining contributing components 32
 - defining employee details 43
 - defining expense details 34
 - defining non-packaged earnings 18
 - defining templates 36
 - enrolling packages 67
 - enrolment defined 65
 - entering applicant component budget details 61
 - entering car parking FBT details 51
 - entering component details 49
 - entering employee component budget details 52
 - entering motor vehicle general details 51
 - identifying reviews 69
 - implementing 1
 - integration points 6

- integration with Recruitment 57, 59
 - linking additional components and components 31
 - maintaining tax scales 25
 - managing overview 65
 - modelling 41
 - modelling applicant packages 57
 - modelling employee packages 42
 - overview 5
 - phases 8
 - re-modelling packages 69
 - reviewing packages 69
 - set up tables 8
 - setting up 13
 - setting up additional components 26
 - setting up applicant annual base components 61
 - setting up applicant period base components 62
 - setting up base components 29
 - setting up business expense codes 16
 - setting up company payroll tax 23
 - setting up compensation rate codes 17
 - setting up components 28
 - setting up deductions 18
 - setting up default pay frequencies 39–40
 - setting up defaults 39
 - setting up earnings 18
 - setting up employee annual base components 46
 - setting up employee period base components 55
 - setting up payroll components 15
 - setting up rules 37
 - setting up tables 2, 4
 - setting up tax options 19
 - setting up templates 36
 - viewing annual additional employee components 53
 - viewing applicant additional annual components 61
 - viewing applicant additional period components 62
 - viewing applicant component PAYG tax liabilities 62
 - viewing employee additional period components 56
 - viewing employee component PAYG tax liabilities 56
 - viewing FBT and GST tax details 20
 - viewing FBT statutory interest rates 21–22
 - Salary Packaging,
 - FBT motor vehicle statutory percentage details 22
 - modelling overview 41
 - setting up tables 2
 - Salary Packaging, FBT
 - viewing statutory interest rates 19
 - Salary Packaging, reports
 - running 75
 - Salary/Tax (AUS) page 43, 59
 - State Payroll Tax (AUS) page 20, 23
 - Tax Scales (AUS) page 20, 25
 - total employment cost
 - defined 41
 - total package value
 - defined 42
- B**
- Base Comp (Per) (AUS) page 43, 55, 59
 - Base Comp (Per) (AUS) page (applicants) 62
 - Base Component (AUS) page 29
 - Base Components (AUS) page 43, 46, 59
 - Base Components (AUS) page (applicants) 61
 - Budget Entry (AUS) page 43, 52, 59
 - Budget Entry (AUS) page (applicants) 61
- C**
- Calculated Comp (AUS) page 29, 32
 - comments, submitting xi
 - common elements xi
 - Consolidated Publications Incorporated (CPI) viii
 - contact information xi
 - country-specific documentation x
 - cross-references x
 - Customer Connection Website viii
- D**
- documentation
 - country-specific x
 - printed viii
 - related viii

updates viii

E

Ern/Ded Included (AUS) page 16, 18
Expense Data (AUS) page 29, 34

F

FBT Reconciliation (AUS) page 75
FBT Stat Interest (AUS) page 20–22
FBT Vehicle Rates (AUS) page 20, 22
FBT/GST Rate (AUS) page 20
FBT/GST Rate Table (AUS) page 20

G

glossary 77

N

notes x

P

Package De-enrolment (AUS) page 71
Package Details (AUS) page 75
Package Enrolment (AUS) page 67
Package Model (AUS) page 43
Package Models (AUS) page 75
Package Rule (AUS) page 37
Package Template (AUS) page 36
Packages Due For Review (AUS) page 75
Pay Calendar Table (AUS) page 16–17
Pay Calendar Table (GP) (AUS) page 16
PeopleBooks
 ordering viii
PeopleCode, typographical
 conventions ix
PeopleSoft application fundamentals vii
prerequisites vii
printed documentation viii

R

related documentation viii
reports
 Salary Packaging
 running 75

S

Salary / Tax (AUS) page (applicants) 62
Salary/Tax (AUS) page 43, 59
State Payroll Tax (AUS) page 20, 23
suggestions, submitting xi

T

Tax Scales (AUS) page 20, 25
terms 77
typographical conventions ix

V

visual cues x

W

warnings xi

