PeopleSoft®

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce

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About This PeopleBook Preface

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements, such as fields and check boxes, 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.

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. 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 applications.

Note. Application fundamentals PeopleBooks are not applicable to the PeopleTools product.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. 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 the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed 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, https://www.peoplesoft.com/corp/en/login.jsp

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 PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplebookspress@mmapartner.com.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes

Resource	Navigation
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	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 letter *O*.
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 the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.

Typographical Convention or Visual Cue	Description
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

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.

If the note is preceded by *Important!,* the note 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.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: "(FRA) Hiring an Employee"

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

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 Used in 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.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
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).
Request ID	An ID that represents a set of selection criteria for a report or process.
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.
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.
User ID	An ID that represents the person who generates a transaction.

PeopleSoft Enterprise Human Resources Administer Workforce Preface

This preface discusses:

- PeopleSoft Products.
- PeopleSoft Enterprise Human Resources application fundamentals.
- PeopleBook structure.

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

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Human Resources Administer Workforce.

PeopleSoft Enterprise HRMS Application Fundamentals

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

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

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

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS 8.9 Application Fundamentals Preface"

PeopleBook Structure

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

The PeopleBooks structure conveys a task-based hierarchy of information. Each chapter describes a process that is required to set up or use the application. Chapter sections describe each task in the process. Subsections within a section describe a single step in the process task.

Some PeopleBooks may also be divided into parts. PeopleBook parts can group together similar implementation or business process chapters within an application or group together two or more applications that integrate into one overall business solution. When a book is divided into parts, each part is divided into chapters.

The following table provides the order and descriptions of chapters in a PeopleBook

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements used in the PeopleBook, if necessary.
Getting Started With…	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • A high-level documentation 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.
Navigation	(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages. **Note.** Not all applications have delivered custom navigation pages.
Understanding…	(Optional) This is an introductory chapter that broadly explains the product and the functionality within the product.

Chapters	Description
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. **Note.** There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of a product, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. **Note.** There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.
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.
Delivered Workflow Appendix	(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application. **Note.** Not all applications have delivered workflows.
Reports Appendix	(Optional) This appendix contains an abbreviated list of all of the product's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

CHAPTER 1

Getting Started with Administer Workforce

This chapter discusses:

- Human Resources Administer Workforce overview.
- Human Resources Administer Workforce business processes.
- Human Resources Administer Workforce integrations.
- Human Resources Administer Workforce implementation.

Human Resources Administer Workforce Overview

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

The Administer Workforce business process includes five basic steps:

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

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

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

   When you bring a new person into your organization, create a record that includes this information:

   - Personal data, such as name, address, personal relationships, and organizational relationships, such as employee or contingent worker.
   - Job data, such as supervisor, department, job code, and compensation details.

3. Entering additional data into the record.

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

   - Tenure with your organization.
   - Prior work experience.
   - Company property and credit cards issued to the employee.
   - Business expenses.

- Emergency contact information.
- Visas, passports, and other identification data.
- Driver's license information.
- Bank accounts.
- Volunteer activities.
- Employee membership in unions, works councils, or labor agreements.
- Country-specific information for workers in Australia, Belgium, Brazil, Canada, France, Germany, Hong Kong, India, Italy, Japan, Malaysia, Mexico, The Netherlands, New Zealand, Singapore, Spain, Switzerland, the United Kingdom, or the United States.

4. Updating the record.

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

5. Viewing and reporting on worker data.

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

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Labor Administration, "Getting Started with Manage Labor Administration"

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting, "Understanding Base Compensation and Budgeting"

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements

Human Resources Administer Workforce Business Processes

PeopleSoft Enterprise Human Resources Administer Workforce provides these business processes:

- Administer adding a person to the workforce.
- Manage workforce data.
- Administer country-specific functionality.
- Manage country-specific workforce data.
- (USF) Administer Personnel Action Requests and automatic actions.
- (USF) Manage leave.
- Manage workforce reporting.

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

Human Resources Administer Workforce Integrations

PeopleSoft Enterprise Human Resources Administer Workforce integrates with these PeopleSoft applications:

- All PeopleSoft Enterprise HRMS applications.
- Other PeopleSoft applications.
- Other third-party applications.

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

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

Human Resources Administer Workforce Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

PeopleSoft Enterprise Human Resources Administer Workforce also provides component interfaces to help you load data from your existing system into the Administer Workforce business process tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists all of the components that have component interfaces:

Component	Component Interface	References
CHKLST_ITEM_TBL	CI_CHKLST_ITEM_TBL	See Chapter 2, "Setting Up the Administer Workforce Business Process," Creating Checklists, page 18.
CNT_CLAUSE_TABLE	CNT_CLAUSE_TABLE	See Chapter 7, "Entering Additional Data in Human Resources Records," Pages Used to Set Up and Track Employment Contracts, page 183.
SALARY_PLAN_TABLE	SALARY_PLAN	See Chapter 5, "Increasing the Workforce," Common Elements Used in this Section, page 83.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, with information about where to find the most current version of each.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS 8.9 Application Fundamentals Preface"

PeopleSoft Setup Manager for PeopleSoft Enterprise HRMS and Campus Solutions 8.9 PeopleBook

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Component Interfaces

CHAPTER 2

Setting Up the Administer Workforce Business Process

This chapter discusses how to:

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

Defining Personnel Actions and Reasons

To set up the Personnel Actions and Reasons tables, use the Actions (ACTION_TBL), Reason Summary (ACTION_TBL), FPS Action (FPMACTION_PNL2), Action Reasons (ACTION_REASON_TBL), and Action Reason Table (RUN_PER710) components.

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

- Define personnel actions.
- Define personnel action reasons.

Understanding Personnel Action Reasons

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

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

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

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

Positions and Action Reasons

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

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

Global Assignments and Action Reasons

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

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

Pages Used to Define Personnel Actions and Personnel Action Reasons

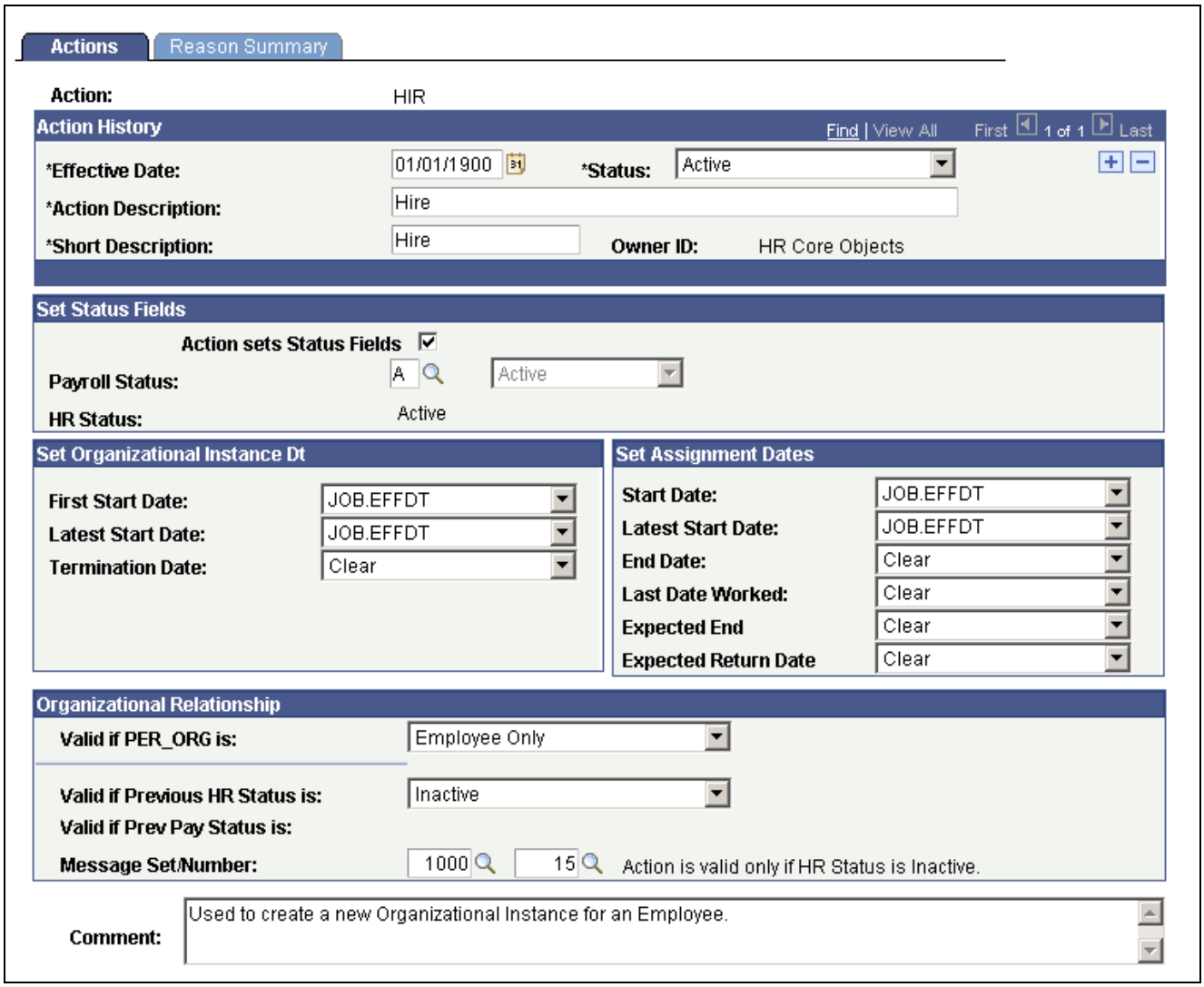
Page Name	Object Name	Navigation	Usage
Actions	ACTION_TBL_GBL	Set Up HRMS, Product Related, Workforce Administration, Actions	Define or review an action code and its values
Reason Summary	ACTION_TBL2	Set Up HRMS, Product Related, Workforce Administration, Actions, Reason Summary	Display the list of reasons for a specific action code
FPS Action	FPMACTION_PNL2	Set Up HRMS, Product Related, Workforce Administration, Actions, FPS Action	(French Public Sector). This page is displayed if you have French Public Sector selected on the Installation table. Use this page to assign the FPS components that can use the action code. This page is discussed in the *PeopleSoft Enterprise Human Resources PeopleBook: Manage French Public Sector*. See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage French Public Sector*, "Setting Up French Public Sector Tables," Assigning FPS Components That Can Use the Action.
Action Reason	ACTION_REASON_TBL	Set Up HRMS, Product Related, Workforce Administration, Action Reasons	Define or modify personnel action reasons.
Action Reason Table	RUN_PER710	Set Up HRMS, Product Related, Workforce Administration, Action Reason Report	Run the Action Reason Table report (PER710). This report lists the reason codes for each personnel action code and arranges them alphabetically by action.

See Also

Chapter 7, "Entering Additional Data in Human Resources Records," Entering Temporary Assignments, page 194

Defining Personnel Actions

Access the Actions page.



Actions page

Set Status Fields

Action sets Status Fields Select this check box to identify actions that cause changes to Status and Date fields for the person receiving this action. When this check box is selected, the Set Organizational Instance Dt and Set Assignment Dates regions, as well as the other fields in the Set Status Fields region, are displayed.

Payroll Status Select the payroll status (EMPL_STATUS) of the person receiving this action. Values are: *Active, Deceased, Leave With Pay, Leave of Absence, Retired, Retired With Pay, Retired-Pension Administration, Short Work Break, Suspended, Terminated, Terminated Pension Pay Out,* and *Terminated With Pay.*

HR Status Identifies the status of the person receiving this action for HR purposes.

Set Organizational Instance Dt (Set Organizational Instance Date)

First Start Date and **Latest Start Date** Select the action table value to use when this action causes the job record for a person to be updated. The First Start Date is the first date that this instance

is active for a person receiving this action. For example, in an employee relationship, this is the Hire Date. The Latest Start Date is the latest date that this instance was renewed. For example, in an employee relationship, this is the re-hire date. The HIR or ADD actions modifies both the First Start Dateand the Latest Start Date to the effective date of the Job row. On a Rehire or Renew action, only the Latest Start Date is changed. These dates are only captured on the organizational instance level, not for additional assignments. The values are: *JOB.EFFDT*and *No Action*

Termination Date Select the action table value used to determine how to set the termination date for an assignment. The values are: *Clear, JOB.EFFDT-1,* and *No Action.*

Set Assignment Dates

Start Date Select the action table value used to determine how to set the date on which an individual assignment starts. the Hire, Rehire, Add, and Renew actions, as well as the Additional Assignments and Host Assignments actions set this value

The values are: *JOB.EFFDT* and *No Action.*

Latest Start Date Select the action table value used to determine how to set the date on which an individual assignment is restarted.

The values are: *JOB.EFFDT* and *No Action.*

End Date Select the action table value used to determine when an assignment is stopped. The values are: *Clear, JOB.EFFDT-1,* and *No Action.*

Last Date Worked Select the action table value used to determine the last date that the person was actively working prior to a termination or a leave action. The values are: *Clear, JOB.EFFDT-1,* and *No Action.*

Expected End Select whether or not to clear the expected end date on the job record. The values are: *Clear* and *No Action.*

Expected Return Date Select whether or not to clear the expected return date on the job record. For example, when a person goes on temporary leave. When the person returns from leave, the expected return date should be cleared. The values are: *Clear* and *No Action.*

Organizational Relationship

Valid if PER_ORG is Indicate whether this action is valid only for certain organizational relationships. Values are: *Contingent Worker Only, Contingent Worker or POI, EMP, CWR, or POI, Employee Only, Employee or Contingent Worker,* or *Person of Interest Only.*

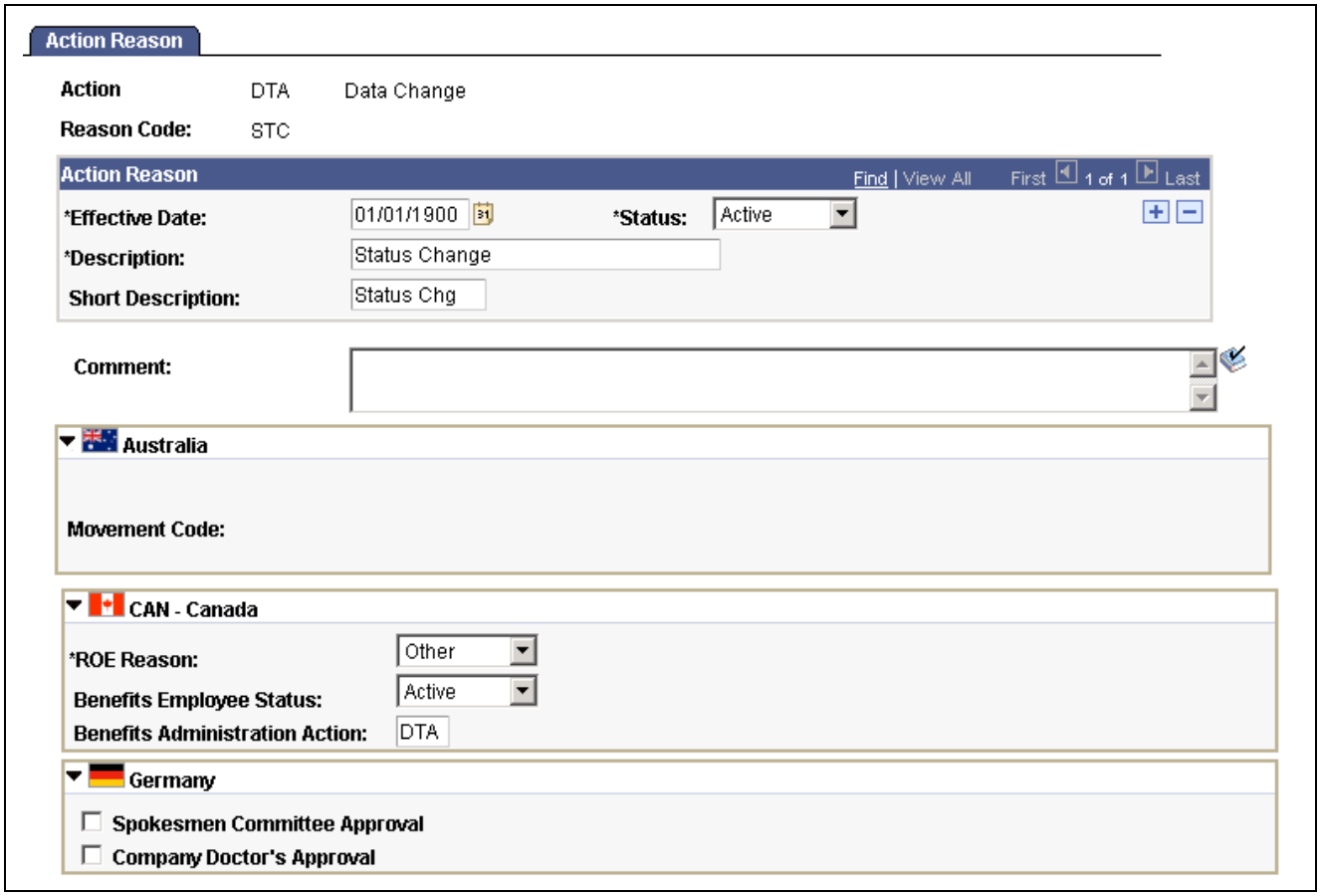
Valid if Previous HR Status is: Indicate that this action is only valid if the job assignment is in the selected HR status. For example, an action of HIR cannot be entered if the prior HR Status is Active. The values are: *Active*and *Inactive*.

Valid if Prev Pay Status is (Valid if Previous Pay Status is): Indicate that this action is only valid if the job assignment is in the selected status. For example, a return from leave action can only be entered if the previous pay status in a Leave status. The values are: *Any Leave, Disability Leave, Suspended,*and *Short Work Break*.

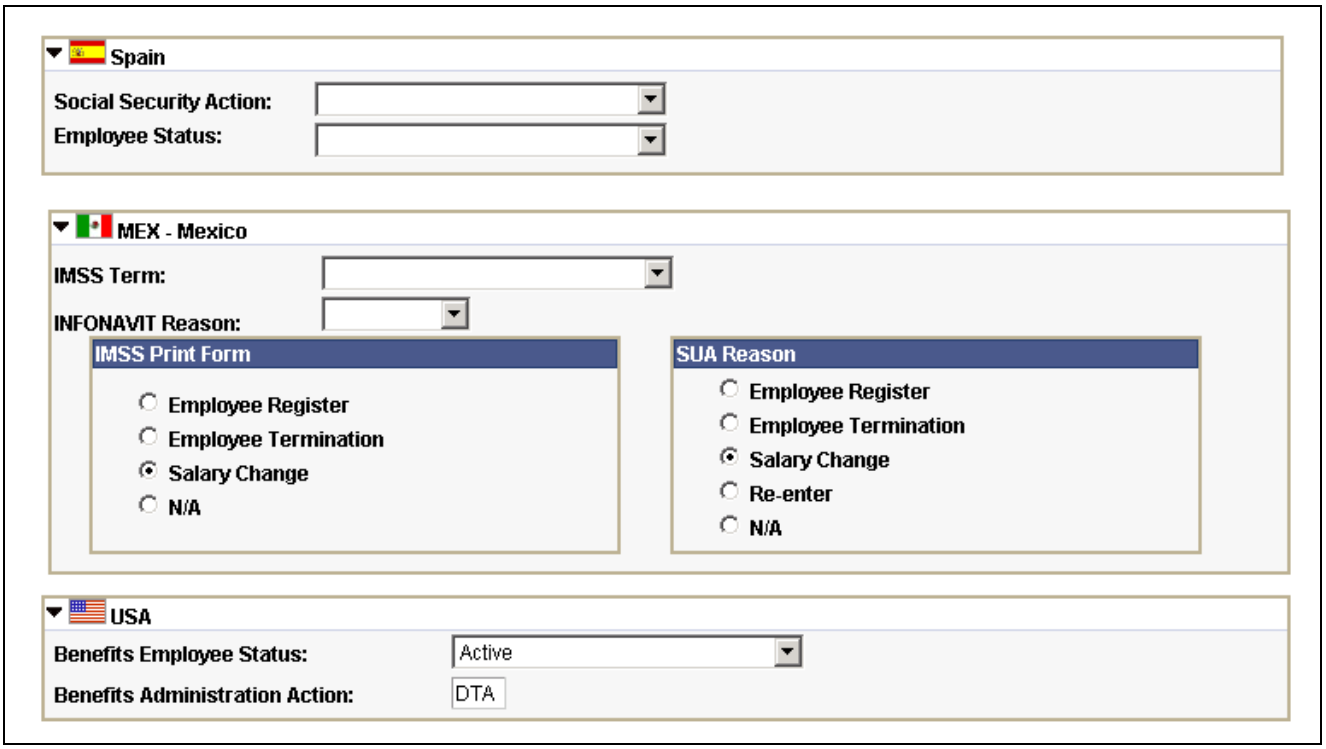
Message Set/Number Choose the Message Set Numberand Message Number to determine the error message used for the Valid if Previous HR Status is or Valid if Prev Pay Status is settings.

Defining Personnel Action Reasons

Access the Action Reason page.



Action Reason page (1 of 2)



Action Reason page (2 of 2)

(AUS) Australia

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

(CAN) Canada

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

Benefits Employee Status Select the status associated with this action.

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

(DEU) Germany

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

Company Doctor's Approval Select this check box, if relevant, for this action reason.

(ESP) Spain

Social Security Action Select the social security action associated with this action reason.

Employee Status Select the employee status associated with this action reason.

(MEX) Mexico

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

IMSS Term Select the reason for termination. Values are: *Agreement, Collective Termination, Employee Death, Employee Transfer, Inability, Lay-off, Leave, Mental or Physical Disability, N/A, Pension-Off, Retirement, Voluntary Renounce,* and *Work Risk Disability.*

INFONAVIT Reason Select a reason to indicate to INFONAVIT why the INFONAVIT loan payments will stop. Values are: *Death, Disability, Disengage, Never Work, Other, Retirement,* and *Transfer.*

IMSS Print Form Select the reason for a change in a worker's information This is done to notify IMSS when an person is hired, rehired, terminated, or has a salary change. Values are: *Employee Register, Employee Termination, Salary Change,* and *N/A*.

SUA Reason Select the reason that gets printed on the SUA notification. Values are: *Employee Register, Employee Termination, Salary Change, Re-enter,* and *N/A*.

(USA) United States

Benefits Employee Status Select the status associated with this action.

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

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Labor Administration, "Setting Up Labor Administration Data"

(USF) Defining Award Actions

To set up the (USF) Award Actions tables, use the Award Action Data (GVT_AWD_ACTN), and Award Type Table (RUN_FGPER810) components.

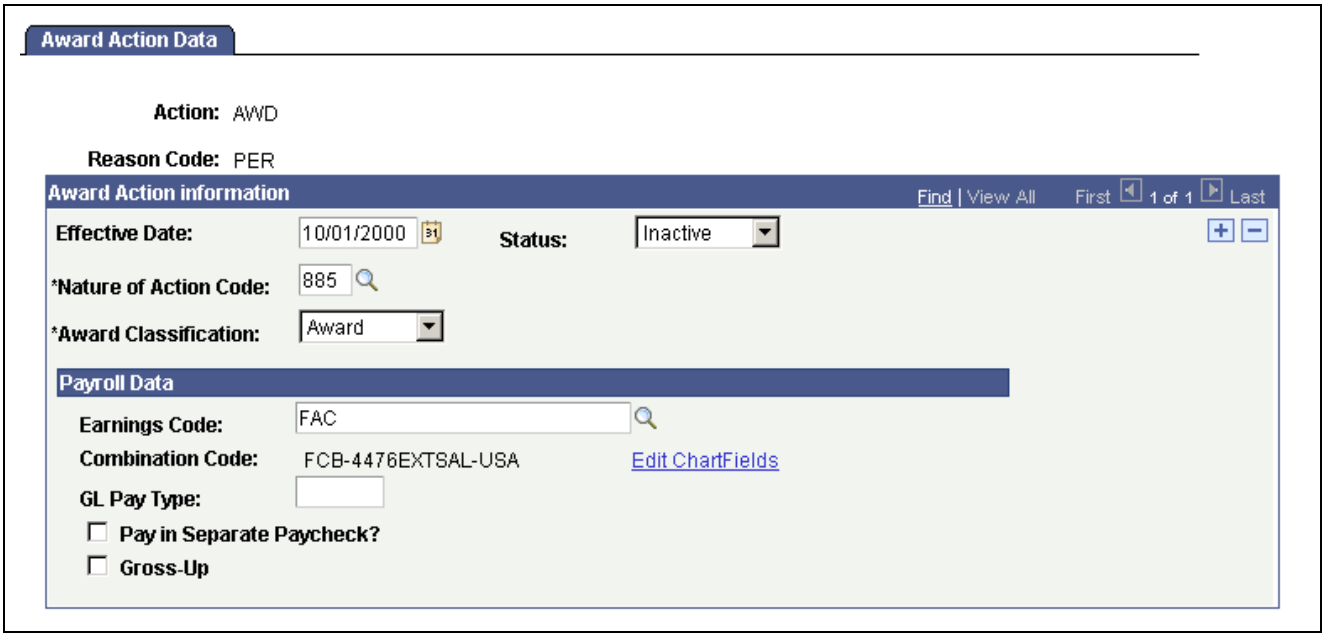
This section discusses how to set up award actions.

Pages Used to Define Award Actions

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

Defining Award Codes

Access the Award Action Data page.



Award Action Data page

Nature of Action Code Enter the reason associated with this award action.

Award Classification Select the award classification, either *Award* or *Bonus*.

Earnings Code Select an earnings code to associate with this award action.

Account Code Select an account code to associate with this award action.

GL Pay Type (general ledger pay type) Select the pay type to associate with this award action.

Pay in Separate Paycheck? Select if this award action should be paid in a separate check.

Gross-Up Select to indicate the award or bonus amount must be grossed-up for payroll purposes.

See Also

Chapter 16, "(USF) Processing Personnel Action Requests," Granting Performance Awards, page 424

Defining Employee Identification

To set up the Employee Identification tables, use the Visa/Permit Table (VISA_PERMIT_TABLE), Supporting Documents Table (SUPPORT_DOC_TABLE), and Drivers License Type Tbl (DRIVE_LIC_TBL) components.

This section discusses how to:

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

Pages Used to Define Employee Identification

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

Defining Visas and Work Permits

Access the Visa/Permit Table page.

Visa/Permit Table page

You must have previously defined the visa or permit classifications on the Supporting Documents Table page.

Visa/Permit Classification Select the appropriate visa or permit classification, if applicable.

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

Defining Additional Employment Setup Data

To set up the additional employment setup data tables, use the Ethnic Groups (ETHNIC_GROUP_TBL), Religions (RELIGION_TBL_GBL), Volunteer Organization Table (VOLUNTEER_ORG_TABL), Provider Info (NEE_PROVIDER_TBL), Empl Class Table (EMPL_CLASS_TABLE), and Duties Type (TEMP_DUTIES_TBL) components.

This section lists the pages used to define additional employment data.

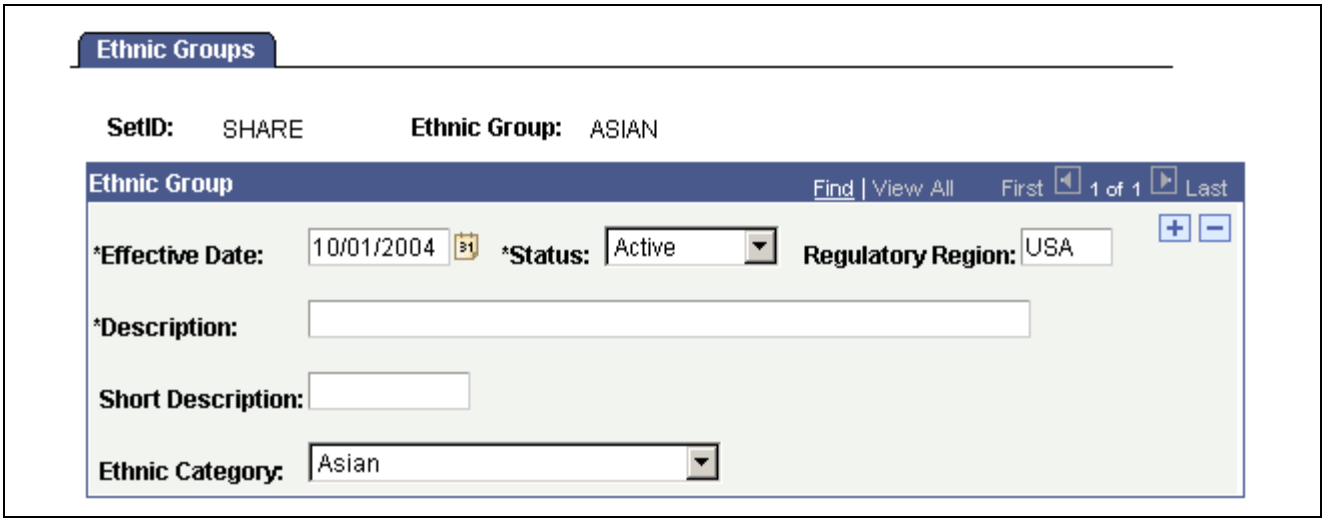
Pages Used to Define Additional Employment Data

Page Name	Object Name	Navigation	Usage
Ethnic Groups	ETHNIC_GROUP_TBL	Set Up HRMS, Product Related, Workforce Administration, Ethnic Groups	Define ethnic groups. Regulations in some countries require ethnic group tracking by employers. The system tables contain predetermined values for defining ethnic groups and religions. You can add or edit values and descriptions.
Religions	RELIGION_TBL_GBL	Set Up HRMS, Product Related, Workforce Administration, Religions	Define religions.
Volunteer Organization Table	VOLUNTEER_ORG_TABL	Set Up HRMS, Product Related, Workforce Administration, Volunteer Organizations	Add volunteer organization data that your company recognizes or sponsors.
Provider Info (provider information)	NEE_PROVIDER_TBL	Set Up HRMS, Product Related, Workforce Administration, Non-Employee Provider	Define the provider, agency, or employer of a contingent worker. Link this information to a worker on the Employment Information page or Contract Data page.
Empl Class Table (employee class table)	EMPL_CLASS_TABLE	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Employee Class, Empl Class Table	Set up employee classes to further categorize your workforce. Employee classes are assigned on the Job Data - Job Information page (JOB_DATA_JOBCODE). **Note.** (GBR) The Northern Ireland Fair Employment Monitoring report (UKNI001) uses the employee class to determine the classification for workers. If your organization submits this report, you must use the required employee classes for the report to work correctly.

Page Name	Object Name	Navigation	Usage
Duties Type	TEMP_DUTIES_TBL	Set Up HRMS, Product Related, Workforce Administration, Temporary Duties	Define or modify duty types for temporary assignments. This field only appears on the Job Code page of Job Data when the action is Temporary Assignment (TAS) and the Installation table has Auto Job Suspend selected. The value can indicate what type of duties are included in the assignment. See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements*, "(GBR) Meeting Regulatory Requirements for the United Kingdom," Running the Northern Ireland Report.

Defining Ethnic Groups

Access the Ethnic Groups page.



Ethnic Groups page

Regulatory Region Enter the country or region used to monitor diversity reporting for this ethnic group.

Ethnic Category (USA) Select the category for this ethnic group. You may select one or more categories for each ethnic group.

Values include:

- *American Indian/Alaska Native*
- *Asian*

- *Black/African American*
- *Hispanic/Latino*
- *Native Hawaiian/Oth Pac Island* (other Pacific Island)
- *Not Specified*
- *White*

Creating Checklists

To set up the checklists tables, use the Checklist Item Table (CHKLST_ITEM_TABLE) and Dynamic Link (DL_LINK_TBL) components.

This section provides an overview of checklists and discusses how to set up standard checklists.

Understanding Checklists

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

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

To make a checklist:

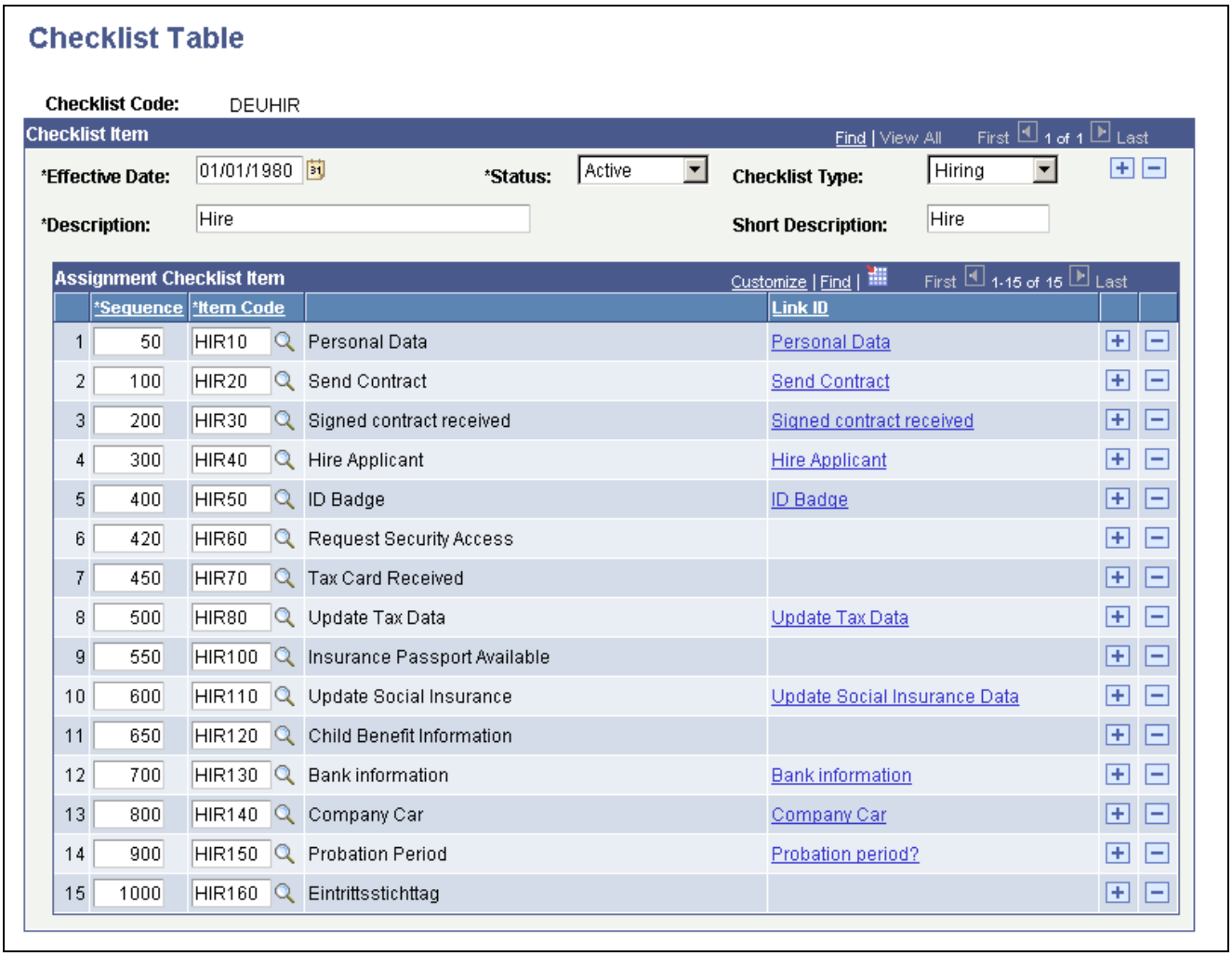
1. Define links to PeopleSoft pages that you may want to associate with a checklist item using the Dynamic Link page.
2. Create checklist items using the Checklist Item Table page.
3. Create a checklist by adding items to a checklist using the Checklist Table page.

Pages Used to Create Checklists

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

Setting Up Standard Checklists

Access the Checklist Table page.



Checklist Table

Checklist Code: DEUHIR

Checklist Item — Find | View All — First 1 of 1 Last

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

*Description: Hire Short Description: Hire

Assignment Checklist Item — Customize | Find | First 1-15 of 15 Last

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

Checklist Table page

Checklist Type Select the type of checklist that you want to create. Values include Hiring, Transfer, Terminate, Org Instance, Training, Medical, and Other.

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

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

CHAPTER 3

Setting Up Country-Specific Tables

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

- (FRA) Set up French workforce tables.
- (DEU) Set up German workforce tables.
- (NLD) Set up Dutch SAMEN countries.
- (ITA) Set up Italian workforce tables.
- (JPN) Set up intercompany transfer company data.
- (JPN) Set up Japanese supervisor levels.
- (MYS and SGP) Set up festive advance religions tables for the Singapore and Malaysia.
- (NZL) Set up New Zealand disability codes.
- (ESP) Set up Spanish workforce tables.
- (BRA) Set up Brazilian establishments.

Understanding Country-Specific Table Setup

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

You need to set up only the tables that are relevant to your organization's business needs.

See Also

Chapter 2, "Setting Up the Administer Workforce Business Process," page 5

(FRA) Setting Up French Workforce Tables

To set up the French workforce tables, use the FRA CPAM Table (CPAM_TABLE_FRA), FRA CRAM table (CRAM_TBL_FRA), Hour Type table (HOURS_TYPE_FRA), and Occupational Illness (OCC_ILLNESS_FRA) components.

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

- Define hours type codes.
- Enter French occupational illness codes.

Understanding French Social Security Tracking Code Maintenance

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

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

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

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

See Also

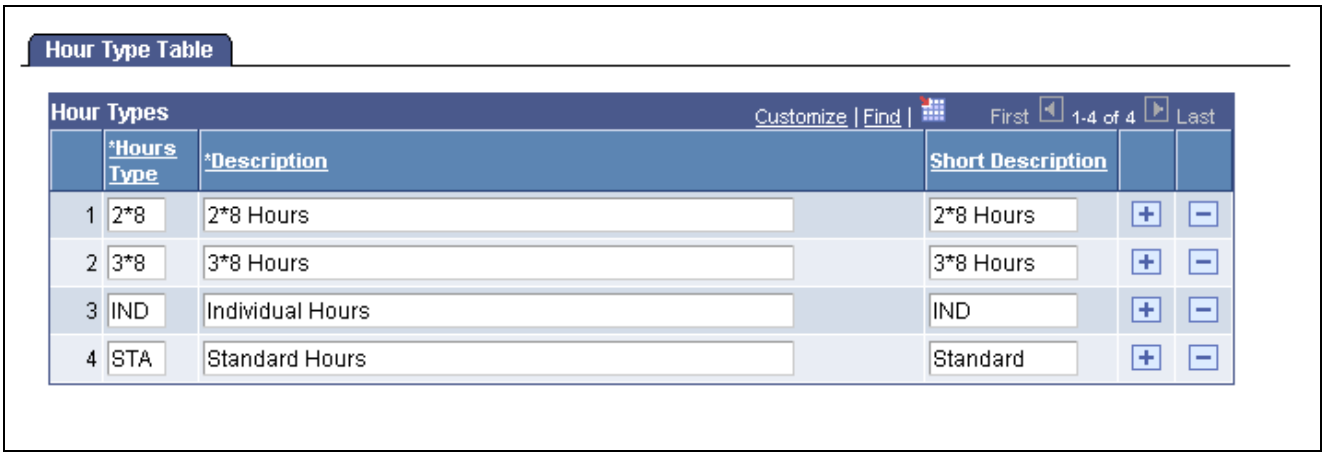
PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Monitor Health and Safety, "Creating and Tracking Incidents"

Pages Used to Set Up French Workforce Tables

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

Defining Hours Type Codes

Access the Hour Type Table page.



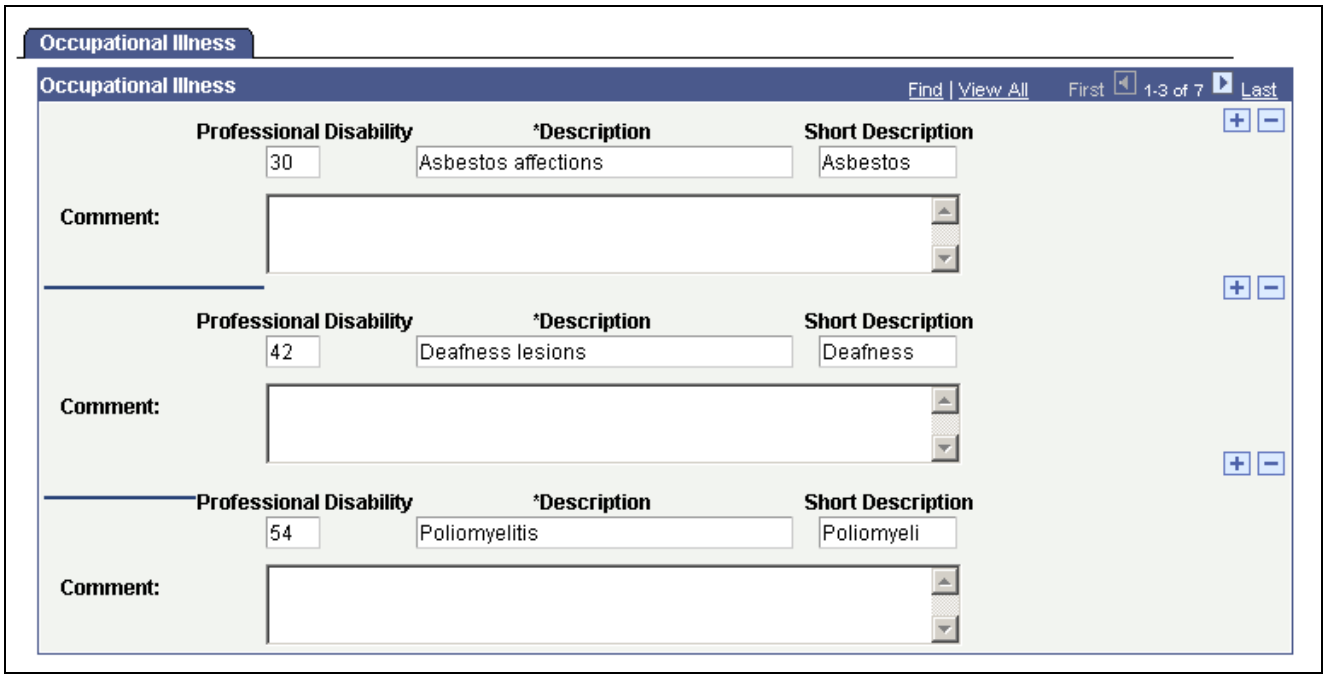
Hour Type Table page

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

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

Entering French Occupational Illness Codes

Access the Occupational Illness page.



Occupational Illness page

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

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

Professional Disability Enter codes for the occupational illnesses that you want to track in your system.

(DEU) Setting Up German Workforce Tables

To set up the German workforce tables, use the Accident Insurance table (ACCDT_INS_TABLE), BA Cd table (BA_CD_TABLE), Function Code Table (FUNCTION_CD_TBL), Nation Duvo table (NATION_DUVO_TABLE), Industrial Inspection (INDUST_INSP_GER), and SI Unit (SI_UNIT_GER) components.

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

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

Understanding Accident Insurance

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

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

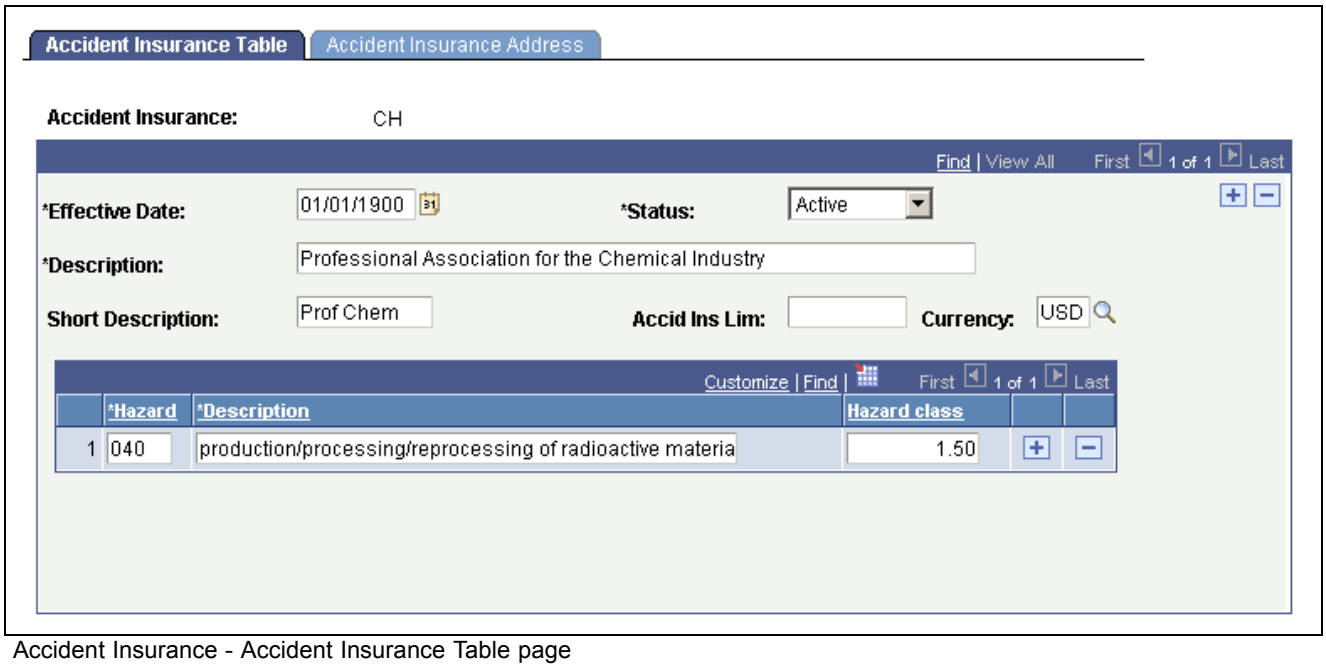
Pages Used to Set Up German Workforce Tables

Page Name	Object Name	Navigation	Usage
Accident Insurance - Accident Insurance Table	ACCDT_INS_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Accident Insurance, Accident Insurance Table	Define accident insurance codes for German employees.
Accident Insurance - Accident Insurance Address	ACCDT_INS2_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Accident Insurance, Accident Insurance Address	Enter address information for this accident insurance provider.
BA Cd Table (Bundesanstalt fur Arbeit Code Table)	BA_CD_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, BA Codes	Add or update *Bundesanstalt fur Arbeit* job codes. PeopleSoft maintains the BA Code table so that you can add or update it. All job codes are published by the German Federal Labor Office (*Bundesanstalt fur Arbeit*) in *Verzeichnis der Berufsbezeichnungen* and are required on reports to the German Federal Labor Office.

Page Name	Object Name	Navigation	Usage
Function Code Table	FUNCTION_CD_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Function Code	Add or maintain job codes for conducting statistical analyses of your workforce in Germany. For example, you can use the codes that you establish here to examine how many consultants, administrators, support staff, or sales representatives make up your workforce.
Nation Duvo Table	NATION_DUVO_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Nation Duvo	Add or update nation DEUEV information.
Industrial Inspection	INDUST_INSP_GER	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Industrial Inspection	Set up German industrial inspection codes that you associate with locations in your organization. **Note.** Industrial inspection codes are not effective-dated and have no status.
SI Unit (social insurance unit)	SI_UNIT_GER	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Social Insurance Unit	Set up German social insurance unit codes that you associate with locations in your organization.

Defining Accident Insurance Codes

Access Accident Insurance - Accident Insurance Table page.



Accident Insurance - Accident Insurance Table page

Hazard Enter the code for the hazard type.

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

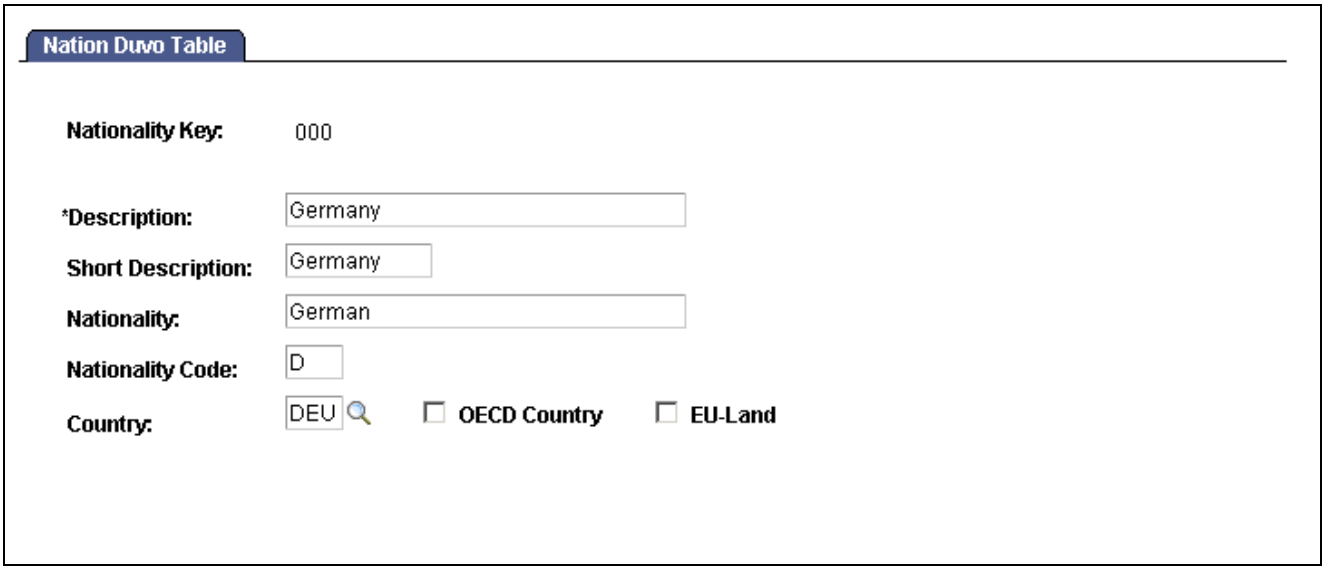
Hazard Class Enter the class, or degree, of the covered hazard.

Entering German Nation DEUEV Codes

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

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

Access the Nation Duvo Table page.



Nation Duvo Table page

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

Nationality Enter the nationality associated with this country. For example, the nationality associated with The Netherlands is *Dutch.*

Nationality Code The DEUEV Directive specifies a unique two-character nationality code for each nationality key. These nationality codes are different from the three-character ISO country codes stored on the Country table.

Country Indicate an ISO country code to be associated with the DEUEV Directive nationality key.

OECD Country (Organization of Economic Cooperation and Development country)	Select to indicate the nationality key is for an OECD country. Germany carefully regulates the types of industries in which citizens of non-OECD countries, like Iraq, can work. For example, non-OECD nationals are restricted from working in defense-related industries or for companies that produce products involving protected trade technologies.
	Note. There isn't always a one-to-one correspondence between ISO countries on the Country table and the nationality keys on the Nation DEUEV table. The German DEUEV Directive makes nationality distinctions that have no direct relationship to ISO country standards.
EU-Land (European Union country)	Select to indicate this is European Union country. Workers from European Union nations are tracked for purposes of reporting to the German Social Insurance administration.

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

(NLD) Setting Up Dutch SAMEN Countries

This section provides an overview of SAMEN (*Wet Stimulering Arbeidsdeelname Minderheden*) country setup and discusses how to update the list of SAMEN countries.

To set up the Dutch SAMEN Country tables, use the SAMEN Country Table (SAMEN_CNTRY_NLD) component.

Understanding SAMEN Country Setup

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

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

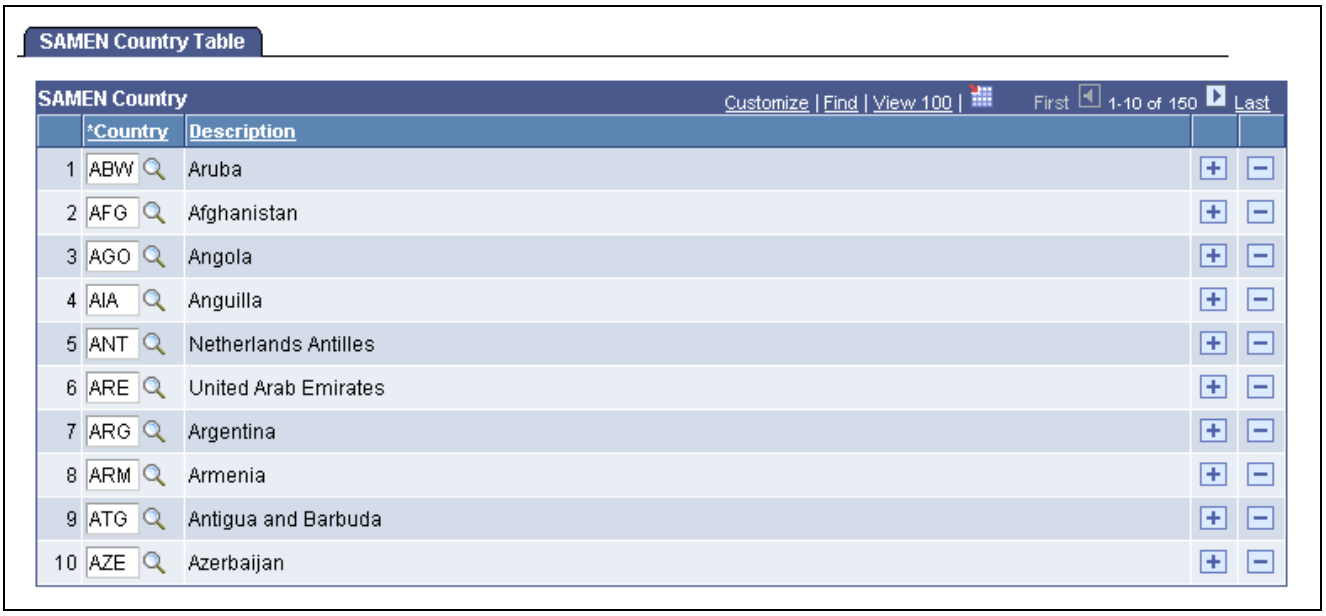
Note. NATO countries (except Turkey) and EEC countries can't, by law, be included on the list of SAMEN countries.

Page Used to Set Up Dutch SAMEN Country Table

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

Updating the List of SAMEN Countries

Access the SAMEN Country Table page.



SAMEN Country Table page

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

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

(ITA) Setting Up Italian Workforce Tables

To set up the Italian Workforce tables, use the ITA C.I.A. table (CIA_TBL_ITA), Cities table (CITY_TABLE_ITA), ITA INAIL table (INAIL_TBL_ITA), ITA INPDAI table (INPDAI_TBL_ITA), ITA INPS table (INPS_TBL_ITA), ITA PREV table (PREV_TBL_ITA), Company Codes (COMP_CD_ITA), Company/Estab Codes (COMP_ESTAB_CD_ITA), IT Country FCode (COUNTRY_TABLE_ITA), ITA Seniority Notification (SENIORIT_NOTIF_ITA), Turnover Action (TRV_ACTREAS_ITA), and Productive Unit (UNITA_PROD_TBL) components.

This section discusses setting up Italian workforce tables and how to:

- Define *Istituto Nazionale per la Previdenza Sociale* (INPS) codes.

- Define seniority notification periods.

Pages Used to Set Up Italian Workforce Tables

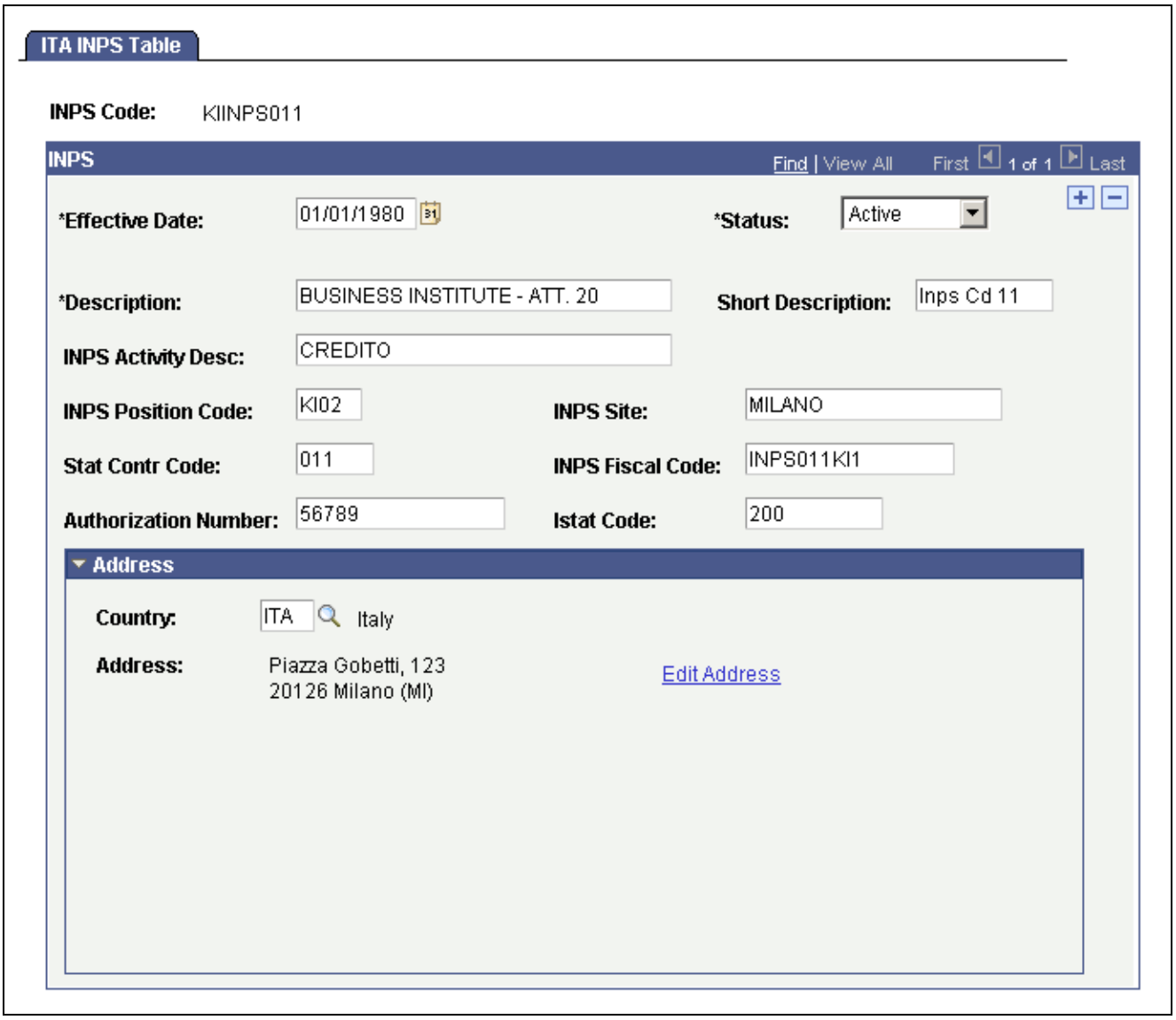
Page Name	Object Name	Navigation	Usage
ITA C.I.A. Table (*Contratto Intergrativo Aziendale*)	CIA_TBL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, C.I.A., ITA C.I.A. Table	Enter company integrative contract information.
ITA City Table	CITY_TABLE_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Cities, ITA City Table	Use the Italian City Table page to maintain the city data. Update the table by downloading the file supplied annually from the *Ministero delle Finanze* website and the running the Italian City Update process. You can enter the postal codes for cities to expedite data entry during the hiring process
ITA INAIL Table	INAIL_TBL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, INAIL Codes, ITA INAIL Table	Define the INAIL (*Instituto Nazionale per l'Assicurazione degli Incidenti sul Lavoro*) position code and rate for INAIL contribution.
ITA INPDAI Table	INPDAI_TBL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, INPDAI Codes, ITA INPDAI Table	Define the INPDAI (*Istituto Nazionale di Previdenza per I Dirigenti di Aziende Industriali*) position codes for pension funds.
ITA INPS Table	INPS_TBL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, INPS Codes, ITA INPS Table	Define INPS (*Istituto Nazionale per la Previdenza Sociale*) data for social security contributions and information needed for social security reporting (DM10).
ITA PREV Table	PREV_TBL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, PREV Codes, ITA PREV Table	Define PREVINDAI codes, descriptions, and PREVINDAI position codes.
Company Codes - INPS Codes	COMP_INPS_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company Codes, INPS Codes	Link the company with INPS codes.

Page Name	Object Name	Navigation	Usage
Company Codes - INAIL Codes	COMP_INAIL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company Codes, INAIL Codes	Link the company with INAIL codes.
Company Codes - INPDAI Codes	COMP_INPDAI_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company Codes, INPDAI Codes	Link the company with INPDAI codes.
Company Codes - PREV Codes	COMP_PREV_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company Codes, PREV Codes	Link the company with PREV codes.
Company Codes - C.I.A. Codes	COMP_CIA_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company Codes, C.I.A. Codes	Link the company with C.I.A. codes.
Company/Estab Codes - INPS Codes	EST_INPS_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company/Estab Codes, INPS Codes	Link the company and establishment with INPS codes.
Company/Estab Codes - INAIL Codes	EST_INAIL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company/Estab Codes, INAIL Codes	Link the company and establishment with INAIL codes.
Company/Estab Codes - INPDAI Codes	EST_INPDAI_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company/Estab Codes, INPDAI Codes	Link the company and establishment with INPDAI codes.
Company/Estab Codes - PREV Codes	EST_PREV_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company/Estab Codes, PREV Codes	Link the company and establishment with PREV codes.
Company/Estab Codes - C.I.A. Codes	EST_CIA_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company/Estab Codes, C.I.A. Codes	Link the company and establishment with C.I.A. (*Contratto Intergrativo Aziendale*) codes.

Page Name	Object Name	Navigation	Usage
IT Country FCode	COUNTRY_DEFN_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Country Fiscal Codes, ITA Country FCode	Define the city fiscal code.
ITA Seniority Notification	SENIORIT_NOTIF_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Seniority Notification Periods, ITA Seniority Notification	Define seniority termination notification periods for employment categories.
Turnover Action	TRV_ACT_REAS_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Turnover Reasons, Turnover Action	Setup action reasons for job turnover actions.
Productive Unit	UNITA_PROD_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Production Unit, Productive Unit	Define production units based on your company's agreements with the unions.

Defining INPS Codes

Access the ITA INPS Table page.



ITA INPS Table page

INPS Activity Desc (INPS activity description) Enter company activity description to be reported on the INPS declarations.

INPS Position Code Enter company INPS position codes.

INPS Site Enter INPS sites to which the company must send the declarations.

Stat Contr Code(statistical contribution code) Enter the statistical contribution code to be reported on the INPS declarations.

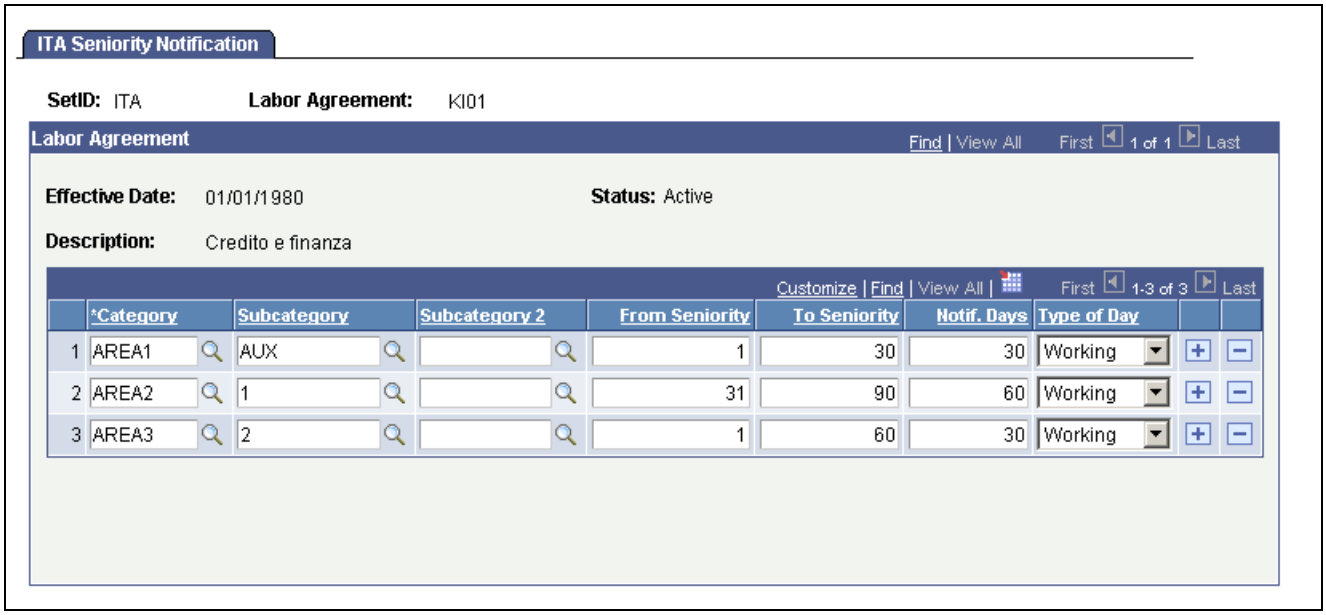
INPS Fiscal Code Enter the company fiscal code.

Authorization Number Enter the authorization codes to be reported on the INPS declarations.

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

Defining Seniority Notification Periods

Access the ITA Seniority Notification page.



ITA Seniority Notification page

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

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

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

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

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

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

Type of Day Indicate whether the notification uses working days or calendar days.

(JPN) Setting Up Intercompany Transfer Company Data

To set up intercompany transfer company data, use the IC Trans External Company/Dept (INTCPX_CPY_JPN) and IC Trans External Superv Lvl (INTCPX_SPV_JPN) components.

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

Understanding Setup of Company Data for Intercompany Transfers

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

To set up company data for intercompany transfers for Japan:

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

See Also

PeopleSoft Enterprise Global Payroll 8.9 PeopleBook, "Working with Payee Data"

Chapter 11, "(JPN) Tracking Intercompany Transfers (Shukkou)," Indicating the Home or Host Compensation Owner, page 304

Pages Used to Set Up Intercompany Transfer Company Data

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

(JPN) Setting Up Japanese Supervisor Levels

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

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

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

Table 1: Supervisor Levels

Supervisor Level	Description
01	Director
02	Senior Manager

Table 2: Departments

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

Table 3: Position, Supervisor Level, and Departments

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

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

Page Used to Set Up Japanese Supervisor Levels

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

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

To set up festive advance religions, use the Religions MYS/SGP (RELIGION_TBL_FA) component.

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

This section lists the pages used to set up festive advance religions for Singapore and Malaysia.

Page Used to Set Up Festive Advance Religions for Singapore and Malaysia

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

(NZL) Setting Up New Zealand Disability Codes

To set up New Zealand disability codes, use the Disability Codes (DISABILITY_TBL_NZL) component.

This section discusses how to define disability codes used to track employee disabilities for New Zealand.

Page Used to Set Up New Zealand Disability Codes

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

(ESP) Setting Up Spanish Workforce Tables

To set up Spanish workforce tables, use the Social Security Country Code (SOCS_CNTRY_ESP), Industry Activity (INDUSTRY_ACT_ESP), Insurance Company (INSUR_COMPANY_ESP), Social Security Risk Code (SOCS_RISKCD_ESP), Social Security Scheme (SOCS_SCHEME_ESP), Social Security Company Setup (SOCS_SETUP_ESP), and Hiring Center Table (HIRING_CENTER_ESP) components.

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

This section discusses how to:

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

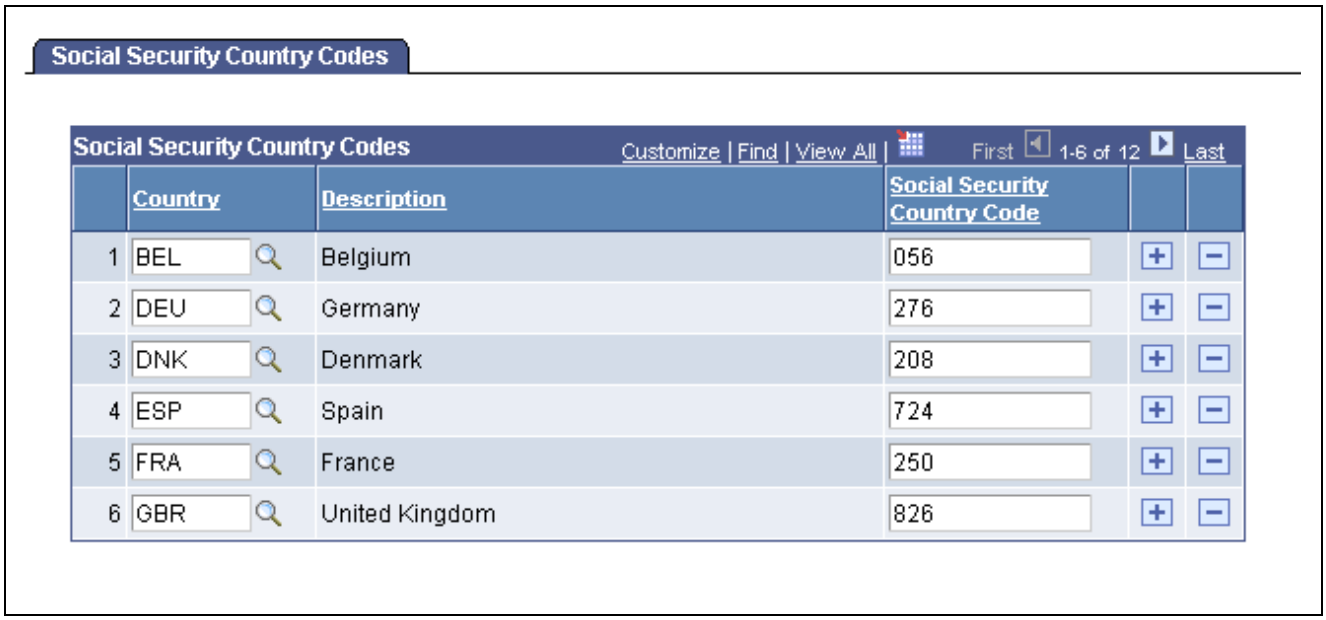
Pages Used for Spanish Workforce Tables

Page Name	Object Name	Navigation	Usage
Social Security Country Codes	SOCS_CNTRY_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Country Codes Table	Enter country codes valid for social security reporting purposes.
Industry Activity	INDUSTRY_ACT_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Industry Activity Table	Enter industry activity codes and descriptions. The industry activity code helps determine the employer social security number.
Insurance Company	INSUR_COMPANY_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Insurance Company Table	Enter insurance company descriptions and address information.
Social Security Risk Code	SOCS_RISKCD_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Soc. Sec. Risk Code Table	View the risk codes that can apply to employees in your organization.

Page Name	Object Name	Navigation	Usage
Scheme	SOCS_SCHEME_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Soc. Sec. Scheme Table, Scheme	Review or define maximum and minimum social security ceilings, as well as review or define the minimum hourly rate for each social security scheme.
Work Group	SOCS_WRKGRP_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Soc. Sec. Scheme Table, Work Group	Define maximum and minimum social security bases by work group, as well as the minimum hourly rate used to calculate the base for part-time employees.
Contribution	SOCS_CONTRIB_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Soc. Sec. Scheme Table, Contribution	Define the contribution rates and percentages for both employees and employers used in the social security calculation.
Company Setup	SOCS_SETUP_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Soc. Sec. Company Setup	Enter specific company information, including data needed for social security purposes.
Hiring Center	HIRING_CENTER_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Hiring Center Table	Define the hiring centers you will attach to employee personnel records on the Contract Data page. You connect every Spanish employee with a hiring center.

Entering Country Codes for Social Security Reporting

Access the Social Security Country Codes page.



Social Security Country Codes page

Country Enter the standard ISO country code.

Social Security Country Code Enter the country code used for social security processing.

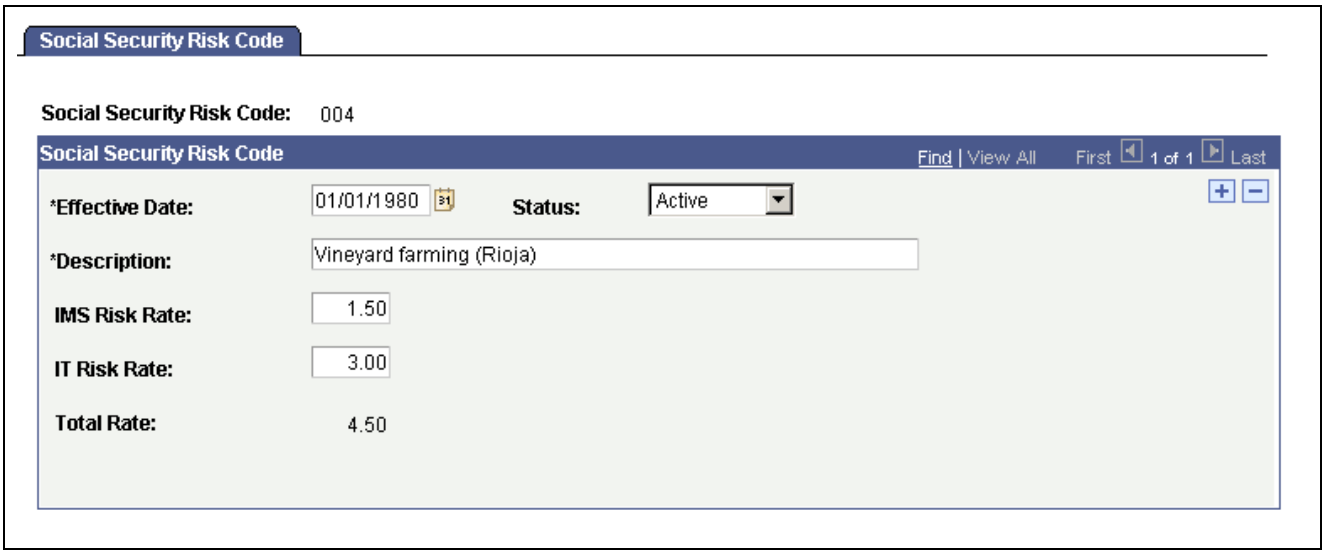
Entering Insurance Company Descriptions and Address Information

Access the Insurance Company page.

Edit Address Click to enter or modify address information.

Viewing Risk Codes

Access the Social Security Risk Code page.



Social Security Risk Code page

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

The PeopleSoft system delivers all social security risk codes as system data.

Social Security Risk Code — The code that you entered to access this page. This is the code defined on this page.

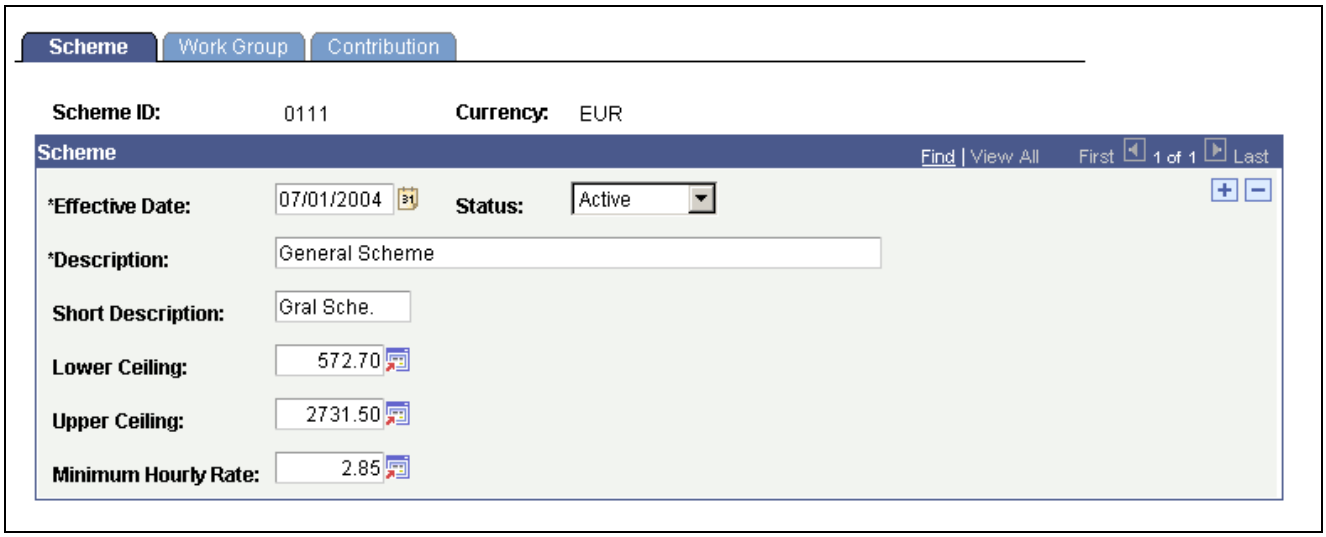
IMS Risk Rate (*Riesgo de Invalidez/Muerte/ Supervivencia*) — Displays the IMS risk rate that applies to this social security risk code. The Spanish government assigns IMS risk rate codes that assess the risk of work-related disability, death, or survival.

IT Risk Rate (*Riesgo de Incapacidad Temporal*) — Displays the IT risk rate that applies to this social security risk code. The Spanish government assigns IT risk rate codes to assess the risk of work-related temporary disability, such as respiratory problems for miners or injuries for construction workers.

Total Rate — The system automatically calculates the total rate, the sum of the IMS risk rate, and the IT risk rate.

Defining Maximum and Minimum Social Security Ceilings

Access the Scheme page.



Scheme page

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

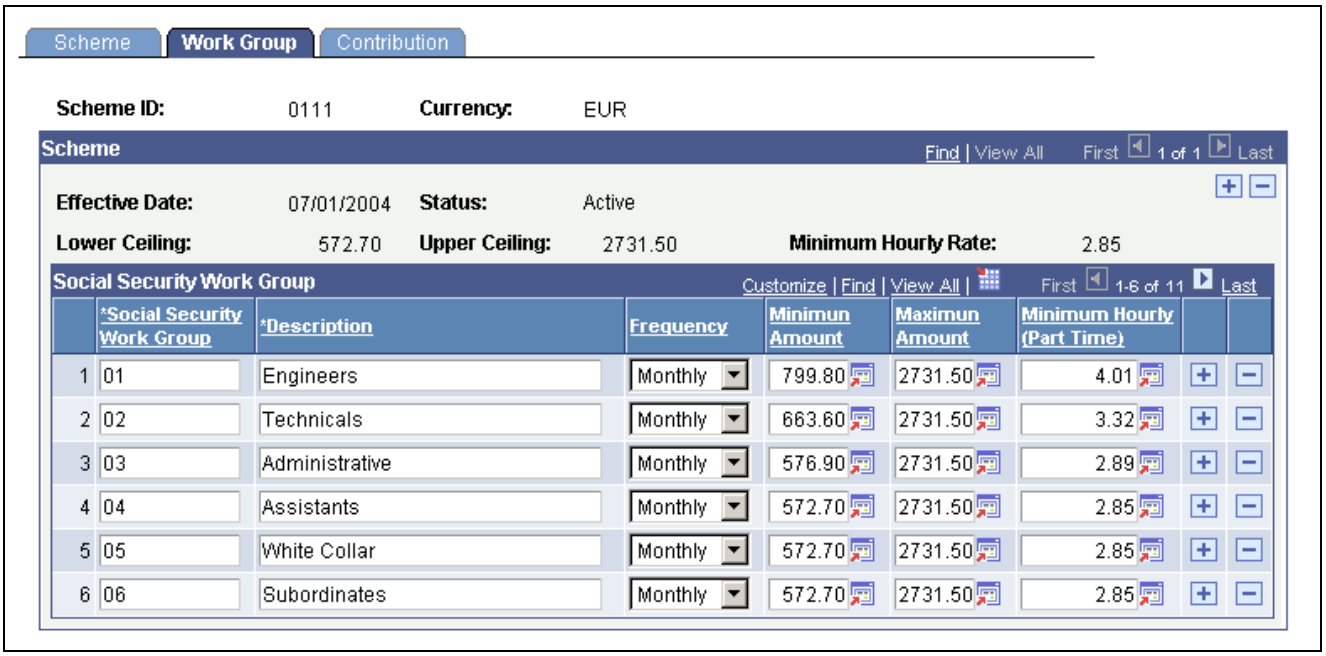
Upper Ceiling Enter the upper ceiling amount used to calculate the professional contingencies funding base.

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

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

Defining Maximum and Minimum Social Security Bases by Work Group

Access the Work Group page.



Work Group page

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

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

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

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

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

Minimum Hourly (Part Time) Enter the minimum hourly rate used to calculate the common contingencies funding base for part-time employees.

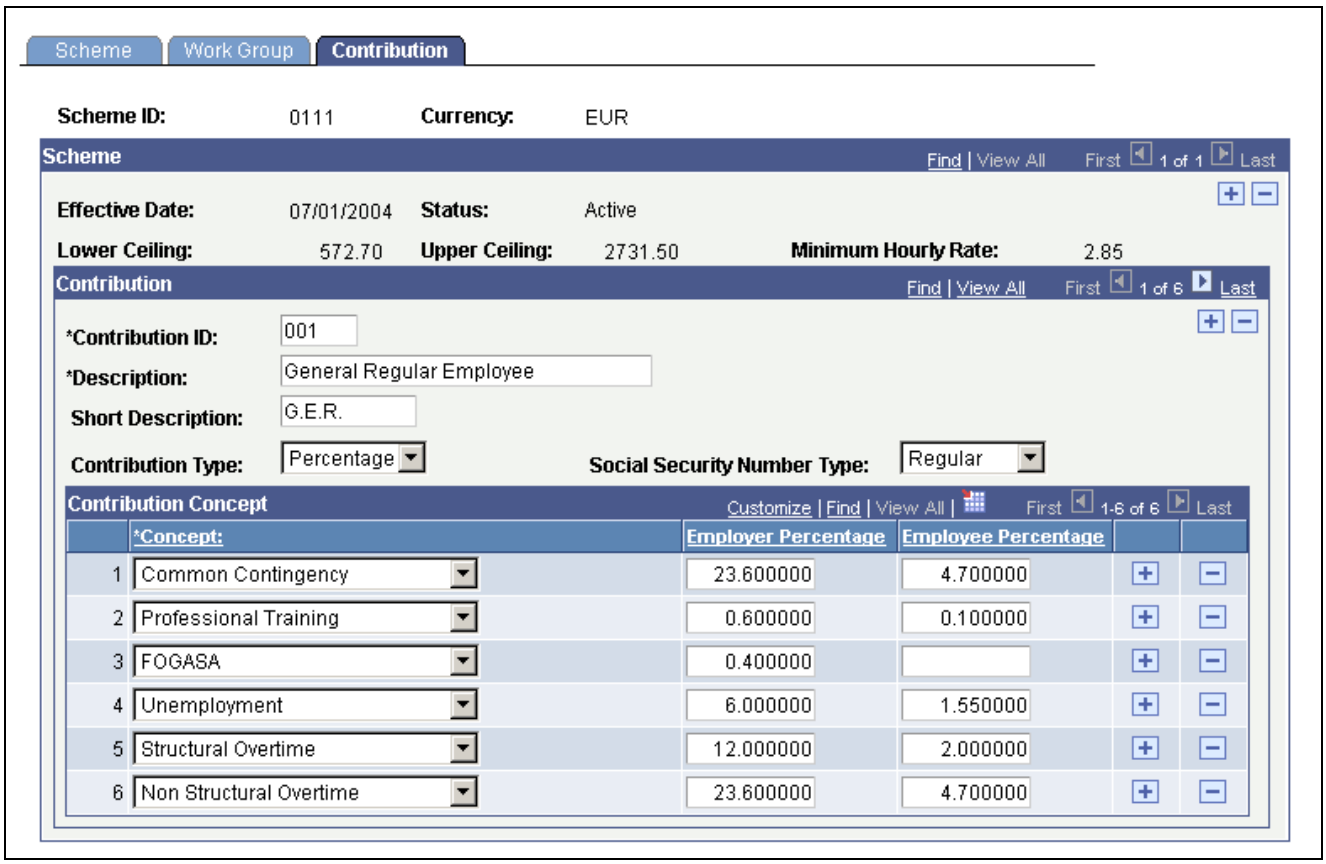
Important! To trigger the correct part-time calculation of the base, you must specify whether the employee is working on a full or part-time basis in the Full/Part field on the Job Information page.

See Also

Chapter 5, "Increasing the Workforce," Entering Job Information, page 94

Defining Contribution Rates and Percentages

Access the Contribution page.



Contribution page

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

Contribution ID

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

Possible values for the contribution ID are:

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

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

Social Security Number Type

Select one of the following values:

- *Regular:* Select to define the percentages used to calculate the contributions of employees with regular contracts.
- *Apprentice:* Select to define rates used to calculate the contributions of apprentices.
- *Training:* Select to define rates used to calculate the contributions of employees with training contracts.

Contribution Type

Select *Percentage* if you will be entering percentages in the Employer Percentage or Employee Percentage fields. If you select *Percentage,* the Employer and Employee Rate fields become unavailable for data entry.

Select *Rate* if you will be entering rates in the Employer or Employee Rate fields. If you select *Rate,* the Employer and Employee Percentage fields become unavailable for data entry.

Important! You should always select *Percentage* for regular employees, and *Rate* for apprentices and trainees.

Concept

Indicates the type of contributions for which the system displays corresponding employee or employer contribution rates or percentages in the Contribution-Concepts grid. Possible values are:

- *Common Contingency*
- *FOGASA*
- *Non Structural Overtime*
- *Permanent Disability D & S*
- *Professional Training*
- *Structural Overtime*
- *Temporary Disability*
- *Unemployment*

Employer Rate

Displays the employer contribution rate associated with the concept listed in the left-hand column of the grid. If you are defining a new rate, enter the rate in this field.

Note. Only contributions of apprentices and trainees are based on fixed rates.

Employer Percentage

Displays the employer contribution percentage associated with the concept listed in the left-hand column of the grid. Social security contributions of regular employees are calculated as percentages of a funding base. If you are defining a new percentage, enter the percentage in this field.

Employee Rate

Displays the employee contribution rate associated with the concept listed in the left-hand column of the grid. If you are defining a new rate, enter the rate in this field.

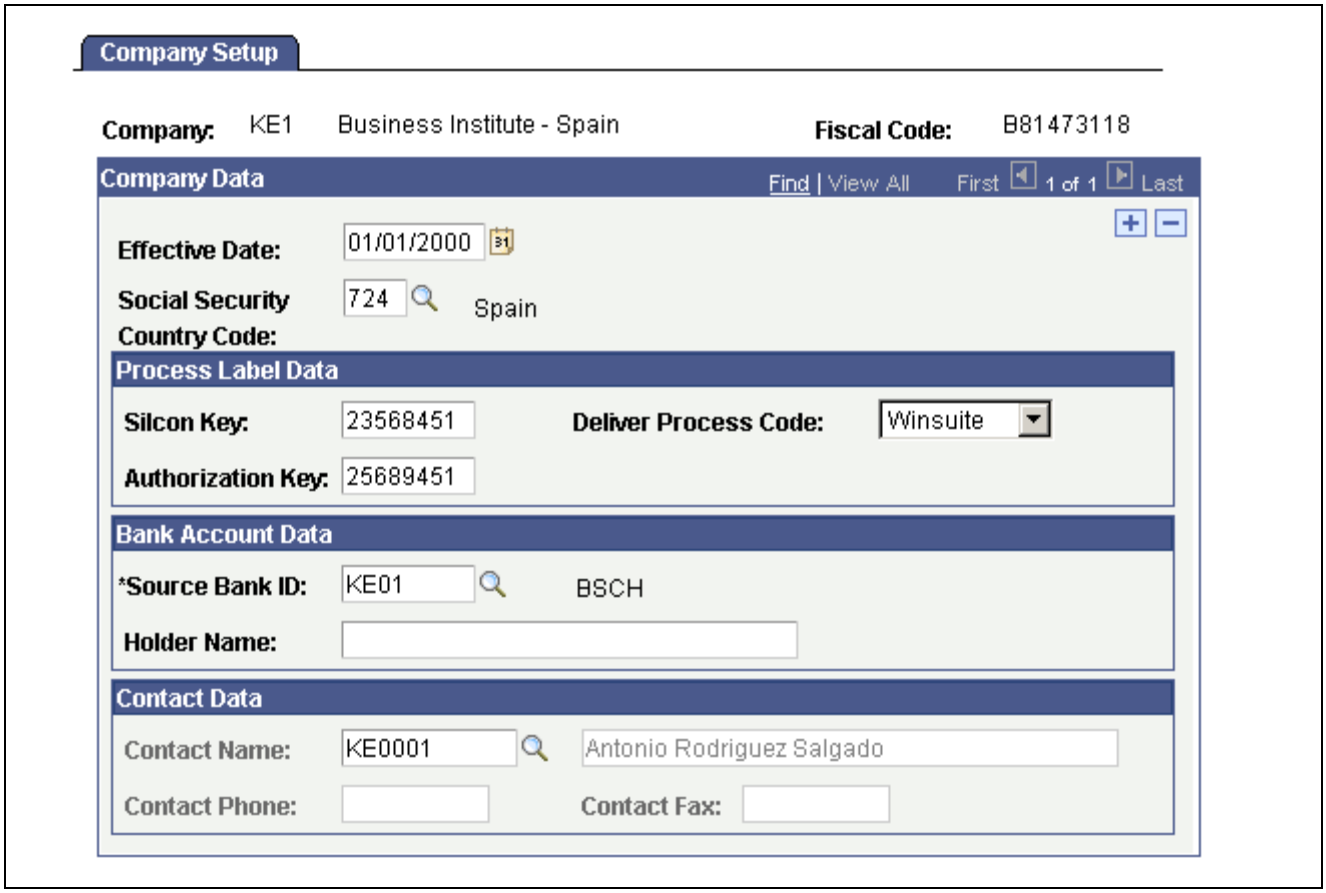
Employee Percentage

Displays the employee contribution percentage associated with the concept listed in the left-hand column of the grid. Social security contributions of

regular employees are calculated as percentages of a funding base. If you are defining a new percentage, enter the percentage in this field.

Entering Company Information

Access the Company Setup page.



Company Setup page

Social Security Country Code Enter the social security country code for the company.

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

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

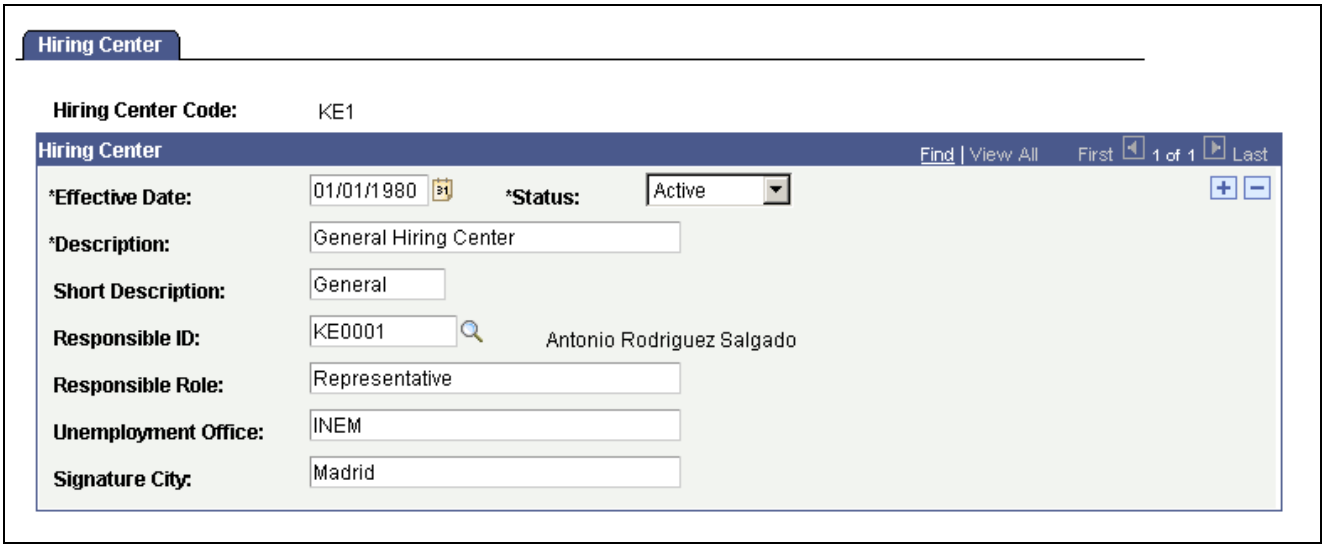
Authorization Key Enter the authorization code to access Winsuite provided by the Social Security General Treasury.

Source Bank ID Enter the name of the bank the company uses.

Holder Name Enter the name the company uses at the bank.

Defining Spanish Hiring Centers

Access the Hiring Center page.



Hiring Center page

Hiring Center Code The hiring center code that you entered to access this page.

Responsible ID Select the employee ID of the person in your organization who is responsible for signing employment contracts at this hiring center.

Responsible Role Enter a description of the job responsibilities of the person who you designated in the Responsible ID field.

Unemployment Office Enter a description of the unemployment office for this hiring center.

Signature City Spanish contracts must be stamped with the date and the name of the city where the contract was signed. Enter the city's name here.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Working with System Data Regulation in HRMS"

(BRA) Setting Up Brazilian Establishments

To set up Brazilian establishments, use the Establishment ID Type (ESTAB_TYPE_BRA), Establishment BRA (ESTAB_TBL_BRA), and Centralization Data BRA (CENTRALIZATION_BRA) components.

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

Note. All Brazilian establishments must belong to a company.

This section discusses how to:

- Enter types of establishment ID codes.

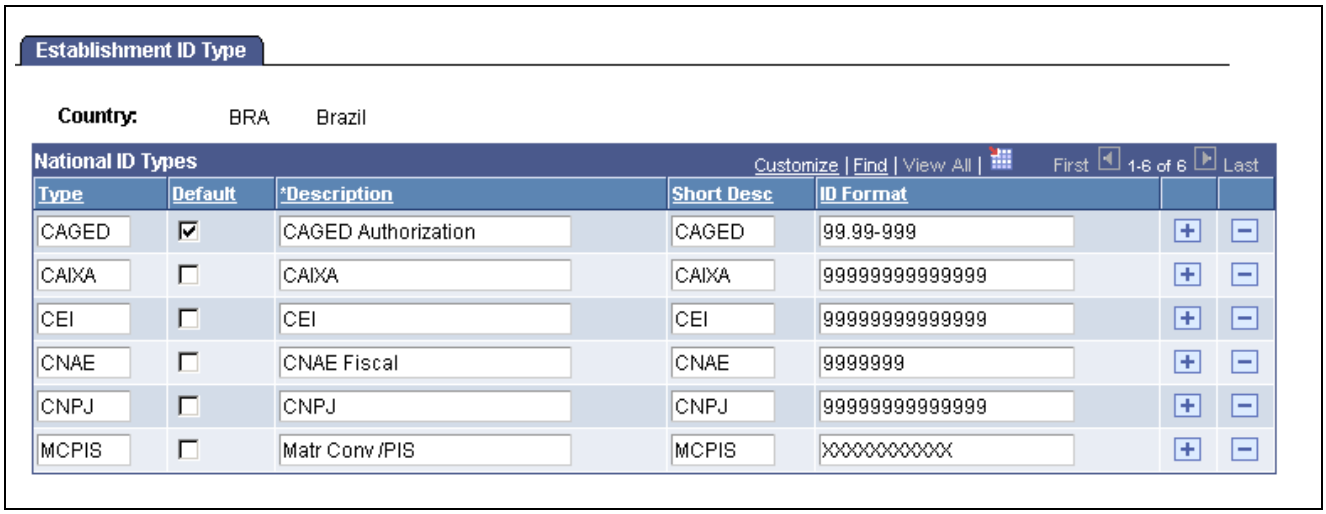
- Set up establishments.
- Group establishments for centralized data.

Pages Used to Set Up Establishments

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

Enter Types of Establishment ID Codes

Access the Establishment ID Type page.



Establishment ID Type page

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

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

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

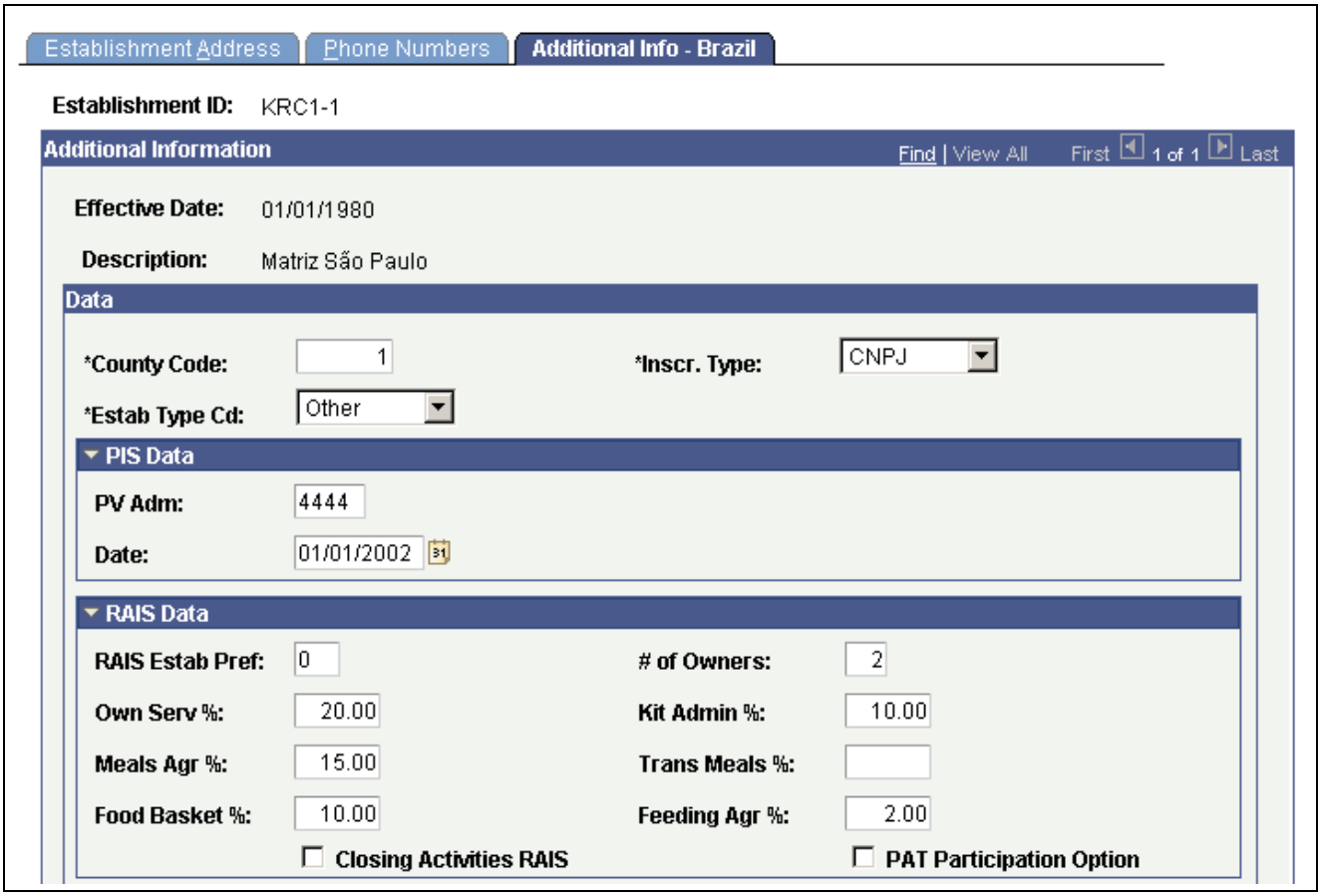
The system has edit masks that apply special formatting to some of the ID types you enter on this page. The system applies the following formatting to these ID types:

- CNPJ: 99.999.999/9999-99

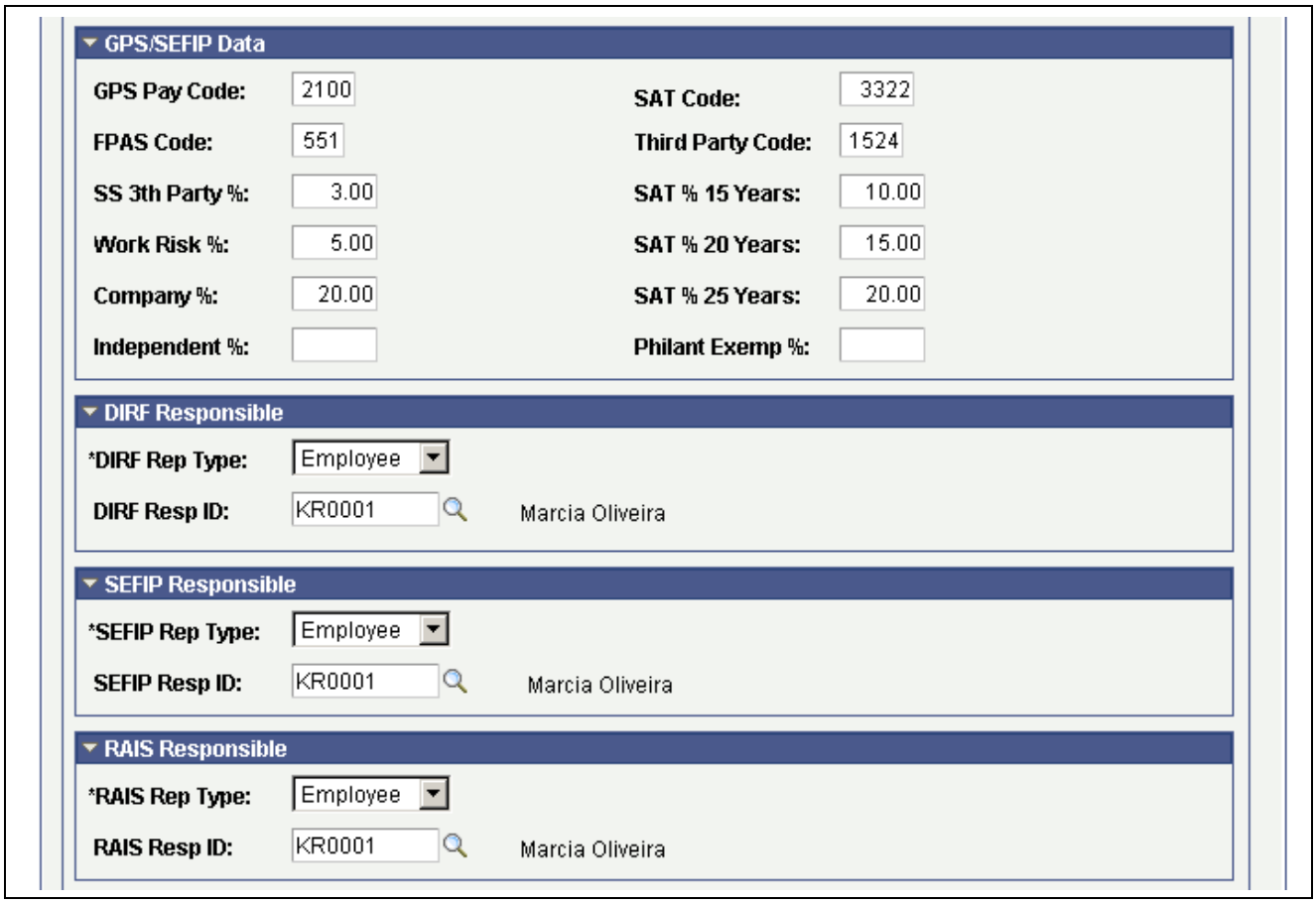
- CNAE: 99.99-9

Setting Up Establishments

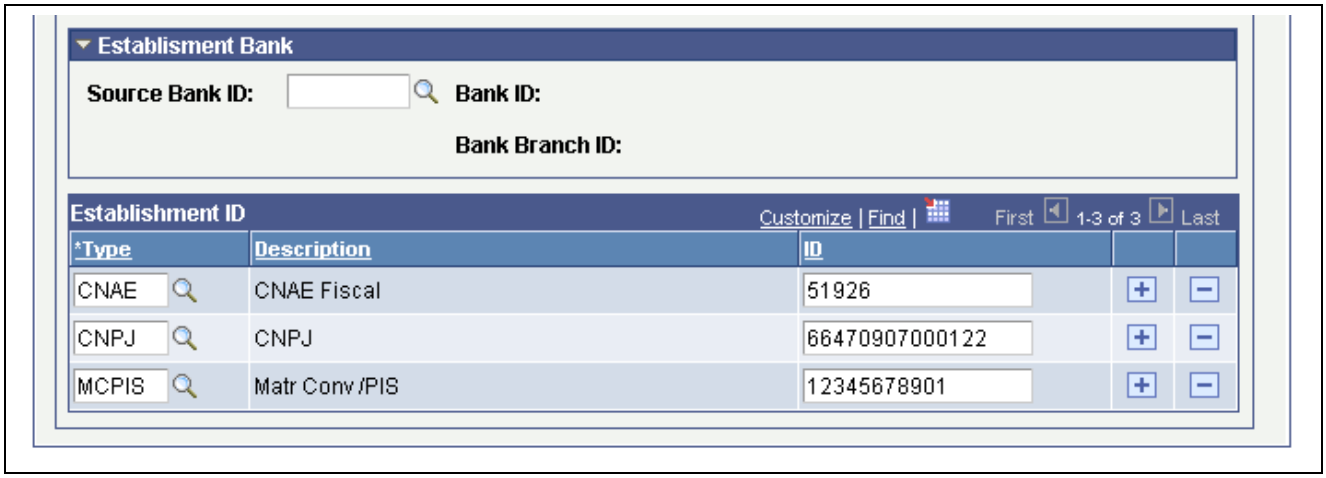
Access the Additional Info - Brazil page.



Additional Info - Brazil page (1 of 3)



Additional Info - Brazil page (2 of 3)



Additional Info - Brazil page (3 of 3)

County Code Enter the county code.

Inscr. Type (inscription type) Select the company inscription type. Values are: *CNPJ* or *CEI.*

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

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

PIS Data

Enter information used to generate the *Programa de Integração Social* (PIS) report.

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

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

RAIS Data

Enter information used to generate the *Relação Anual de Informações Sociais* (RAIS) report.

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

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

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

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

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

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

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

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

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

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

GPS/SEFIP Data

Enter information used to generate the *Guia de Recolhimento da Previdência Social/ Sistema Empresa de Recolhimento do FGTS e Informações à Previdência Social*(GPS/SEFIP) report.

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

SAT Code Enter the work accident insurance code.

FPAS Code Enter the FPAS (*Fundo de Previdência e Assistência Social*) social assistance and pension fund code. The activity type of the company determines this code.

The system identifies all third parties and their respective percentages assigned to this code and generates a total percentage of collection for the establishment.

Third Party Code Enter the code of the third-party that collected service from the establishment. The system uses these codes to identify the third parties involved in a specific collection.

The SEFIP report uses this code to get the GFIP value.

SS 3th Party % (social security third-party percentage) Enter the total percentage of social security contributed by a third-party for a specific collection. The system uses this value to obtain the Other Entities Amount on the social security payment form (GPS).

SAT % 15 Years (SAT percentage up to 15 years), **SAT % 20 Years** (SAT percentage up to 20 years), and **SAT % 25 Years** (SAT percentage up to 25 years) Enter the percentages that apply to only the eligible employees for each case of special retirement (with 15, 20, and 25 years of service). The system uses this percentage to obtain the special retirement component of the INSS total amount for collection.

Worth Risk % Enter the establishment's identified predominant worth risk percentage. The system uses this percentage to obtain worth risk component of the INSS total amount for collection.

Company % Enter the percentage to use to obtain the company component of the INSS total amount for collection.

Independent % Enter the percentage to use to obtain the independent component of the INSS total amount for collection.

Philant. Exemp % (philanthropy exemption percentage) Enter the percentage to use to obtain the philanthropy exemption component of the INSS total amount for collection.

DIRF Responsible

Complete this group box only for *Declaração de Informações à Receita Federal* (DIRF) centralizing establishments.

DIRF Rep Type (DIRF representative type) Select whether the party responsible for generating the DIRF file is a *Company, Employee,* or *Non Empl* (non-employee).

DIRF Resp ID (DIRF responsible ID) Enter the company code or employee ID of the party responsible for generating the DIRF file.

SEFIP Responsible

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

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

RAIS Responsible

Complete this group box only for RAIS centralizing establishments.

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

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

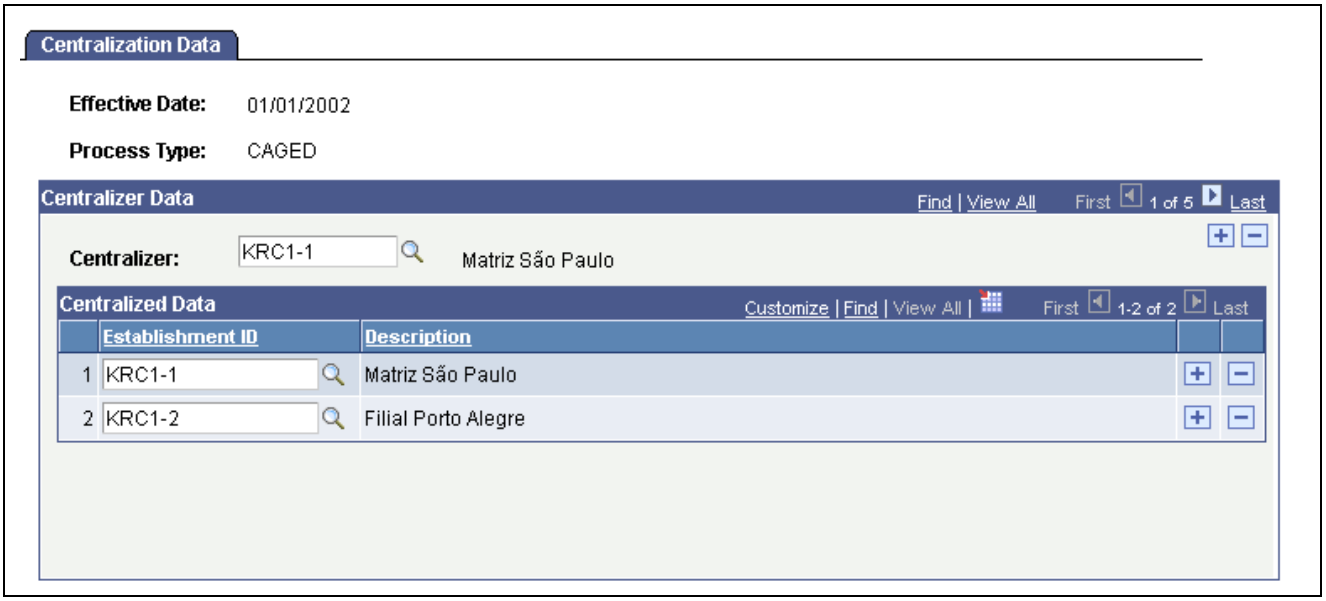
Establishment ID

Type Enter an establishment ID type.

ID Enter the establishment's ID.

Grouping Establishments for Centralized Data

Access the Centralization Data page.



Centralization Data page

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

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

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

CHAPTER 4

Adding a Person in PeopleSoft Human Resources

This chapter discusses how to:

- Add a person in PeopleSoft Enterprise Human Resources.
- Control data access for persons of interest (POIs) without jobs.

Adding a Person

To create a person record, use the Add a Person component (PERSONAL_DATA_ADD). Use the (CI_PERSONAL_DATA) component interface to load the data into the table for this component.

This section provides an overview of identification assignment, lists common elements, and discusses how to:

- Enter name and biographical data.
- Enter contract information.
- Enter country-specific person data.
- Create organizational relationships and maintain checklists.

Note. You should create and save either a Job Data or a Person of Interest (POI) Relationship record for a new person at the time you create the new person.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Understanding Identification Assignment

When you open the Add a Person component, the system requests a person ID. There are two ways to assign IDs:

- Automatically

  If you use automatic ID assignment, the system adds IDs sequentially as you add new people.

  The system maintains the last assigned ID on the Installation Table - Last ID Assigned page.

  See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HRMS," Specifying the Starting Number for System-Assigned Numbers.

- Manually

You enter the IDs, using any system that you choose for the organization. With manual entry, you don't need to assign IDs sequentially.

Assigning IDs manually is the only way that you can include alphabetical characters in the IDs.

Note. To avoid maintaining two different sets of IDs, it is recommended that you use only one method to assign them: either always assign them manually or always let the system assign them.

Common Elements Used in This Component

Smoker and **As of** — Indicate if the person is a smoker and enter the date on which the person started smoking. A person's smoker status affects benefits eligibility and rate determination in PeopleSoft Enterprise Human Resources Manage Base Benefits and is required for regulatory reporting.

Ethnic Group — Select an ethnic group. You set up ethnic groups on the Ethnic Groups page.

(AUS) Affirmative action reports and the ATSI (Aboriginal and Torres Strait Islander) code come from this page.

(USA) Values are based on U.S. Federal Equal Employment Opportunities ethnic categories. Use ethnic group information to compile the establishment's affirmative action plan and to generate several equal employment opportunity (EEO) reports.

(GBR) Values are based on U.K. equal opportunity ethnic categories.

Military Status — Enter the person's military status.

Preferred — Select the person's preferred email address or phone number.

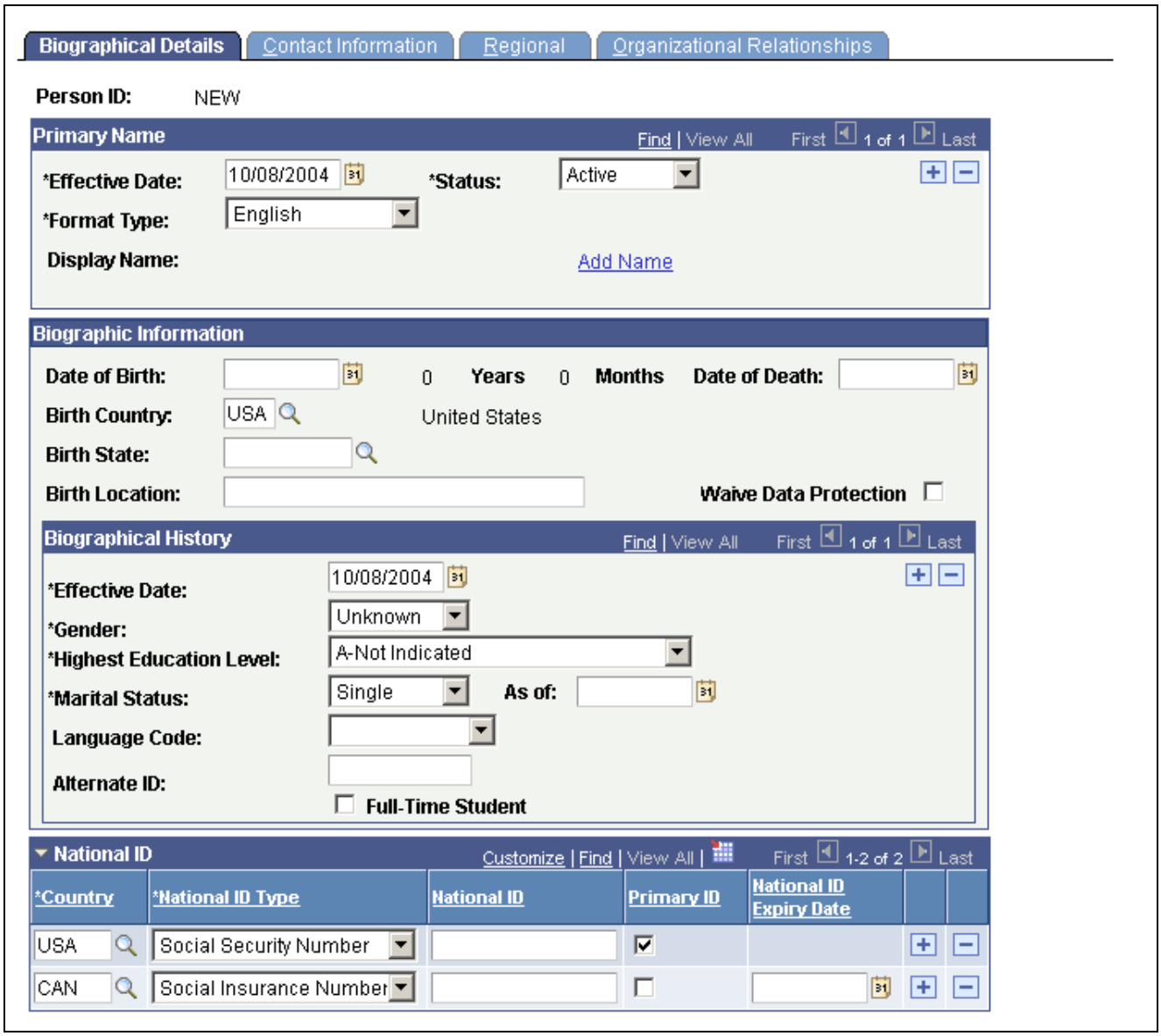
Pages Used to Add a Person

Page Name	Object Name	Navigation	Usage
Biographical Details	PERSONAL_DATA1	Workforce Administration, Personal Information, Biographical, Add a Person, Biographical Details	Enter name and other biographical information.
Edit Name	NAME_DFT_SEC	Workforce Administration, Personal Information, Biographical, Add a Person, Biographical Details Click the Add Name link on the Biographical Details page.	Edit and refresh name information.
Contact Information	PERSONAL_DATA2	Workforce Administration, Personal Information, Biographical, Add a Person, Contact Information	Enter or edit a person's contact information.

Page Name	Object Name	Navigation	Usage
Address History	ADDR_HISTORY_SEC	Workforce Administration, Personal Information, Biographical, Add a Person, Contact Information Click the Add Address link on the Contact Information page.	Enter the effective date, country, and status for the address and refresh the address data when you make changes.
Edit Address	EO_ADDR_SEC	Workforce Administration, Personal Information, Biographical, Add a Person, Contact Information Click the Add Address link on the Contact Information page and then click Update Addresses on the Address History page.	Edit address information.
Regional	PERSONAL_DATA3	Workforce Administration, Personal Information, Biographical, Add a Person, Regional	Enter country-specific personal information.
Organizational Relationships	PERSONAL_DATA4	Workforce Administration, Personal Information, Biographical, Add a Person, Organizational Relationships	Select an organizational relationship and checklist to create for this person.
Update Personal Data-Future	PRCSRUNCNTL	Set Up HRMS, System Administration, Database Processes, Update Personal Data-Future	Run this process shortly after midnight to update the Personal Data component. The process will update data with new, effective information that is not currently in the component. The Update Personal Data-Future process runs the HR_PERSDATA application engine program.

Entering Name and Biographical Data

Access the Biographical Details page.



Biographical Details page

Person ID If you are adding a new person and are using system-assigned IDs, the field displays the value *NEW* until you save this record. Otherwise, the system displays the value that you enter to access the page.

Primary Name

Display Name Click to add or edit a name.

Biographical Information

Date of Birth Enter the person's date of birth. If you leave this field blank, a warning message appears when you save the record. You can continue entering information after you acknowledge the message. Though the birth date isn't required for the Administer Workforce business process, the system uses it to

calculate a person's age in some benefit and payroll tasks. It also calculates dates, such as the U.K. expected retirement date, based on the person's age.

Birth Country Select a country. Based on the selected country, the system might display additional fields.

Birth Location Usually a city, town, or village.

Date of Death This field does not appear during the hiring process. Use this field when updating a person's records.

Waive Data Protection European community employment and personal privacy legislation specifies that personnel information can't be passed across countries in the European Union without authorization from the employee. Select this check box if you obtain the employee's consent to share personal data with users in other European Union member nations.

Biographical History

Highest Education Level Select a value.

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

Marital Status and **As of** Select the person's marital status. Values are: *Common Law, Divorced, Head of Household, Married, Separated, Single, Unknown,* and *Widowed.* When a marital status is changed, the default as of date is the same as the biographical history effective date.

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

Note. Laws in the Netherlands require tracking effective-dated marital status information for employees.

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

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

Alternate ID To use a second type of ID for a person, enter the ID.

Full-Time Student Select if the person is a full-time student.

National ID

Country Select the country that issued the worker's national ID.

National ID Type The system enters the value that you establish for this country on the National ID Type Table page. You can override this default.

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

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

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

(GBR) For the U.K. the normal format of two letters followed by six digits and then one letter for National Insurance identification appears by default. Other options that are dependent on employee status are available.

Tax Ref (SGP) Select if the worker's national registration ID is used as the person's employer tax reference number. This field is for information only.

National ID Expiry Date (CAN) Enter the expiration date for this National ID.

(CAN) Verifying Social Insurance Numbers for Canadian Employees

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

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

(NLD) Verifying Social Security IDs for Dutch Employees

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

(USA) Reporting to Government Agencies When the Social Security Number Is Unknown

When the social security number (SSN) is missing, the system enters the default number that is defined on the National ID Type table, usually all 9s. However, reports and files that are created by PeopleSoft Enterprise Payroll for North America for submission to government agencies, such as the IRS or Social Security Administration, convert missing or unknown SSNs to the specific format that is required by the government agency. For example, a missing or unknown SSN is reported to the IRS using all zeros on the W-2 file.

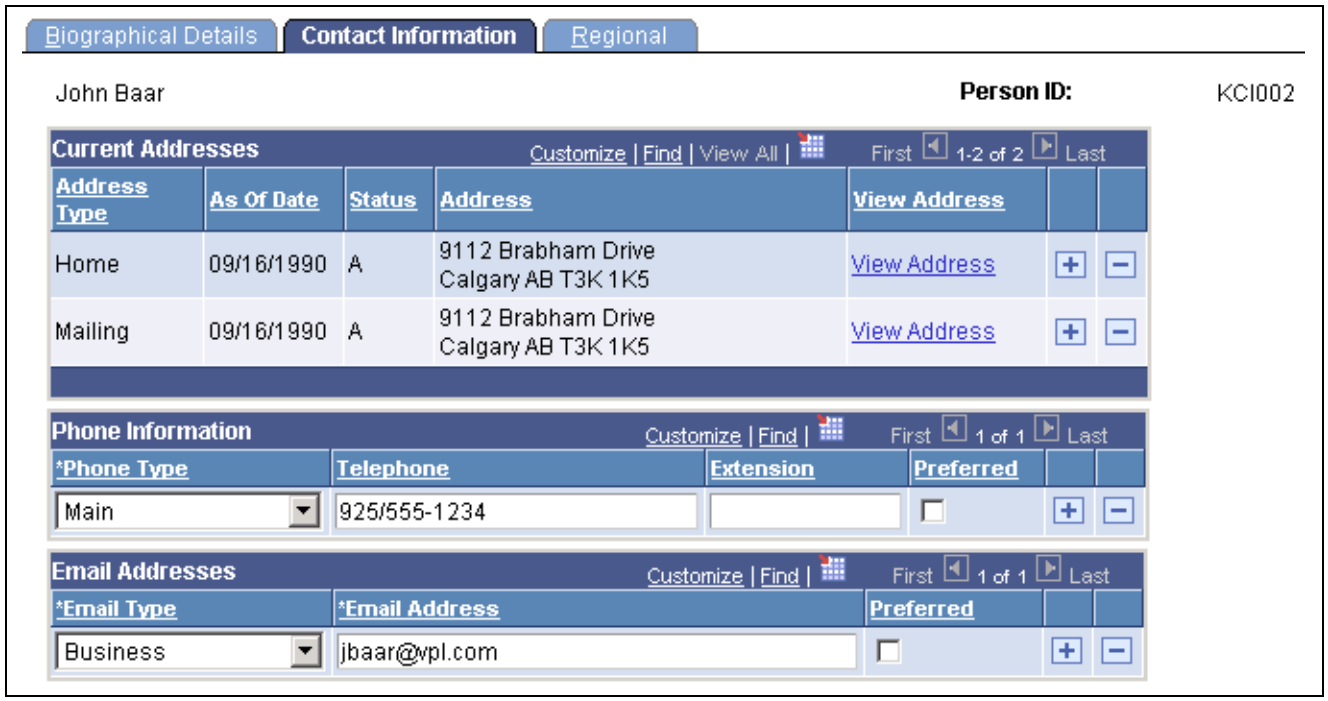
See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Monitor Health and Safety, "Processing Rehabilitation, Claims, and Examination Data," Tracking Employee Medical Exam Results

Chapter 7, "Entering Additional Data in Human Resources Records," page 179

Entering Contact Information

Access the Contact Information page.



Contact Information page

Current Address

Address Type Select the type of address that appears in this row. The system automatically displays*Home* for the first address that you enter.

Note. You must have one address with a type of *Home* in order for the system to successfully calculate taxes for this person in PeopleSoft Enterprise HRMS: North American Payroll.

Add Address Click to add an address and access the Edit Address page to edit addresses.

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

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

Phone Information

Phone Type and **Telephone** Select the phone type and enter the phone number. The system formats the number based on the standard phone number format for the person's country as indicated in the address. If no special formatting is specified for the selected address country, the format is *000/000-0000*.

Select *Main* to designate a phone number as the individual's primary contact number.

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

Email Addresses

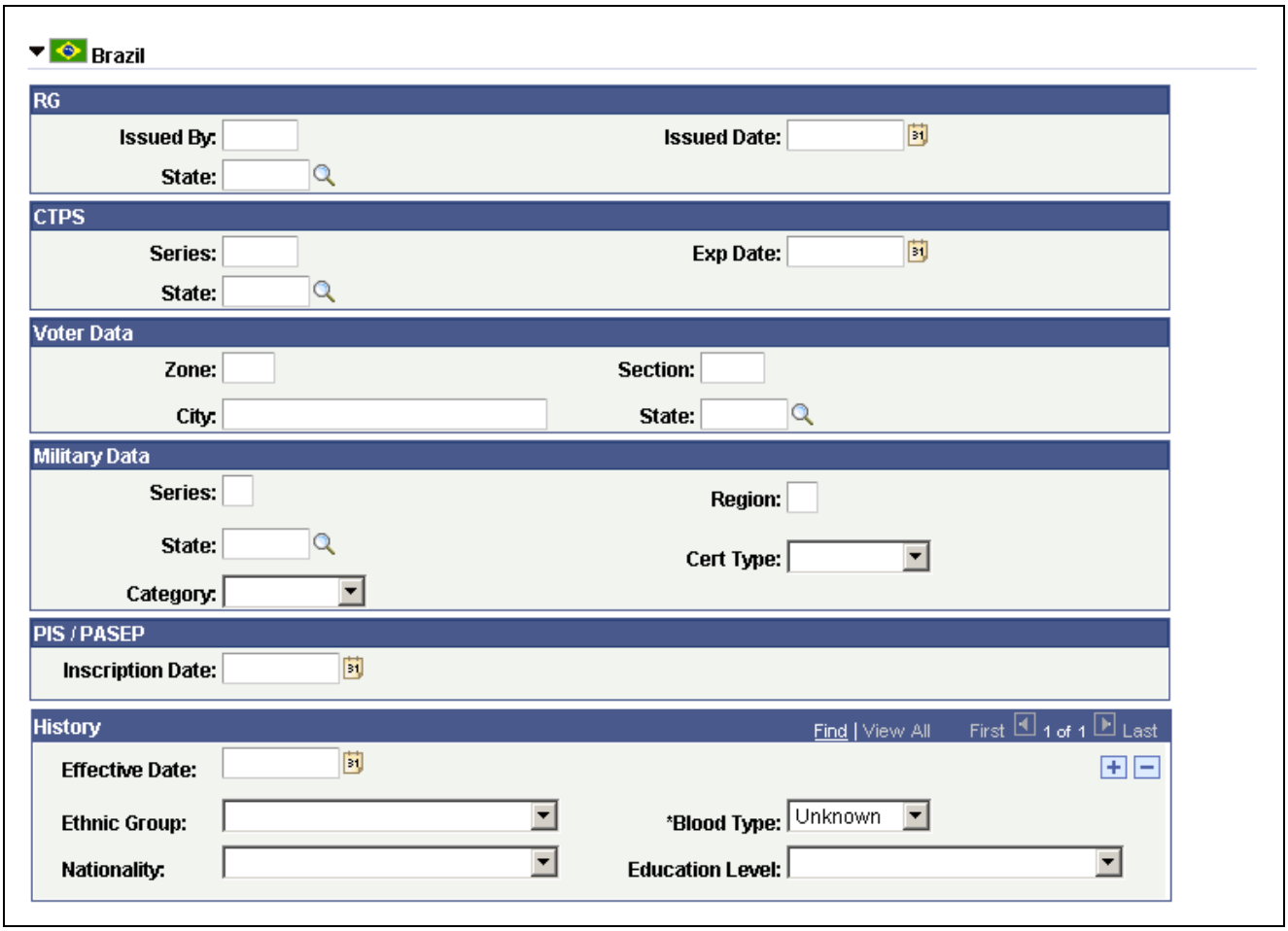
Email Type and **Email Address** Select an email type and enter the employee's email address.

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

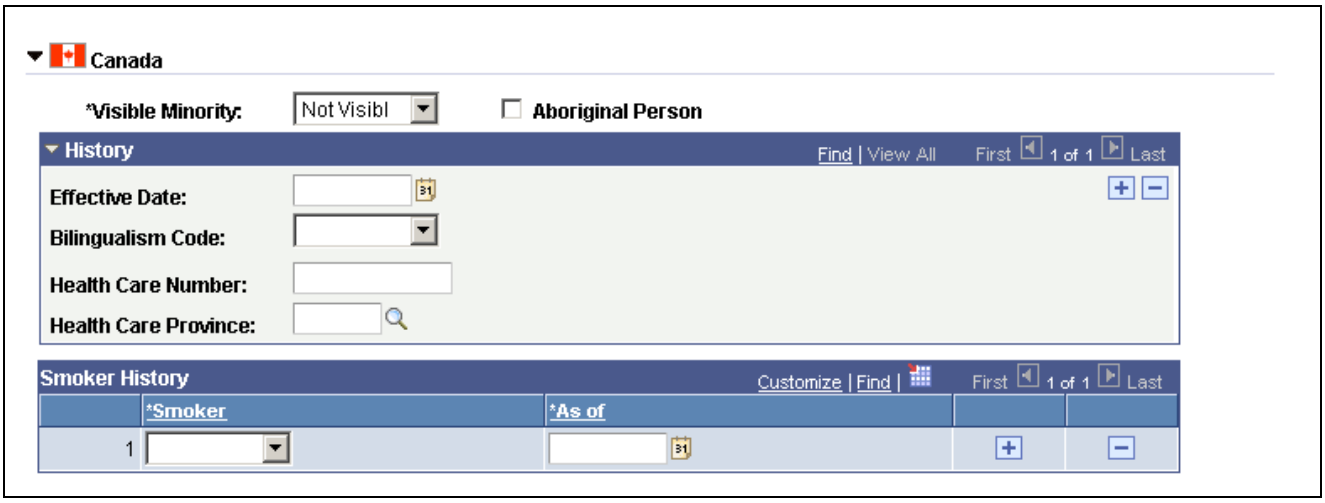
Entering Country-Specific Person Data

Access the Regional page.

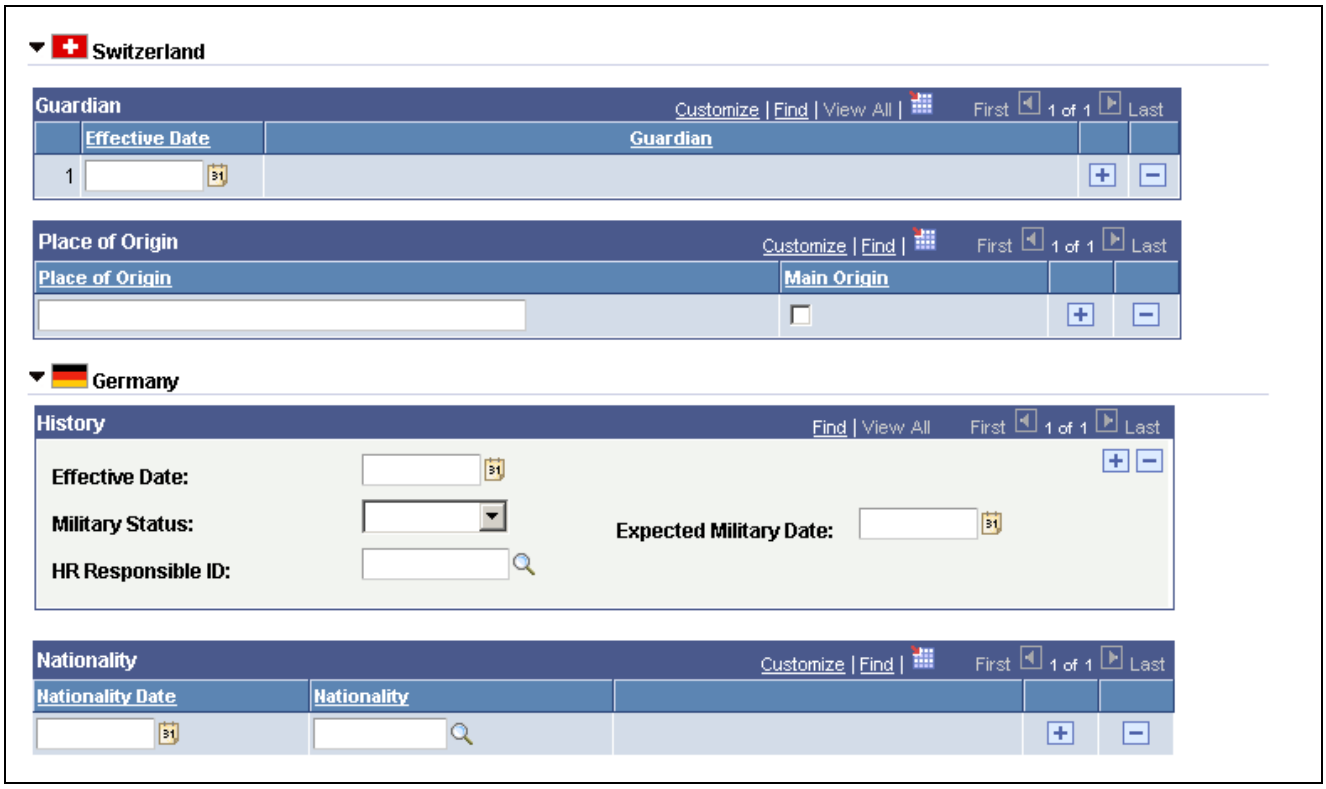
Regional page (1 of 10)



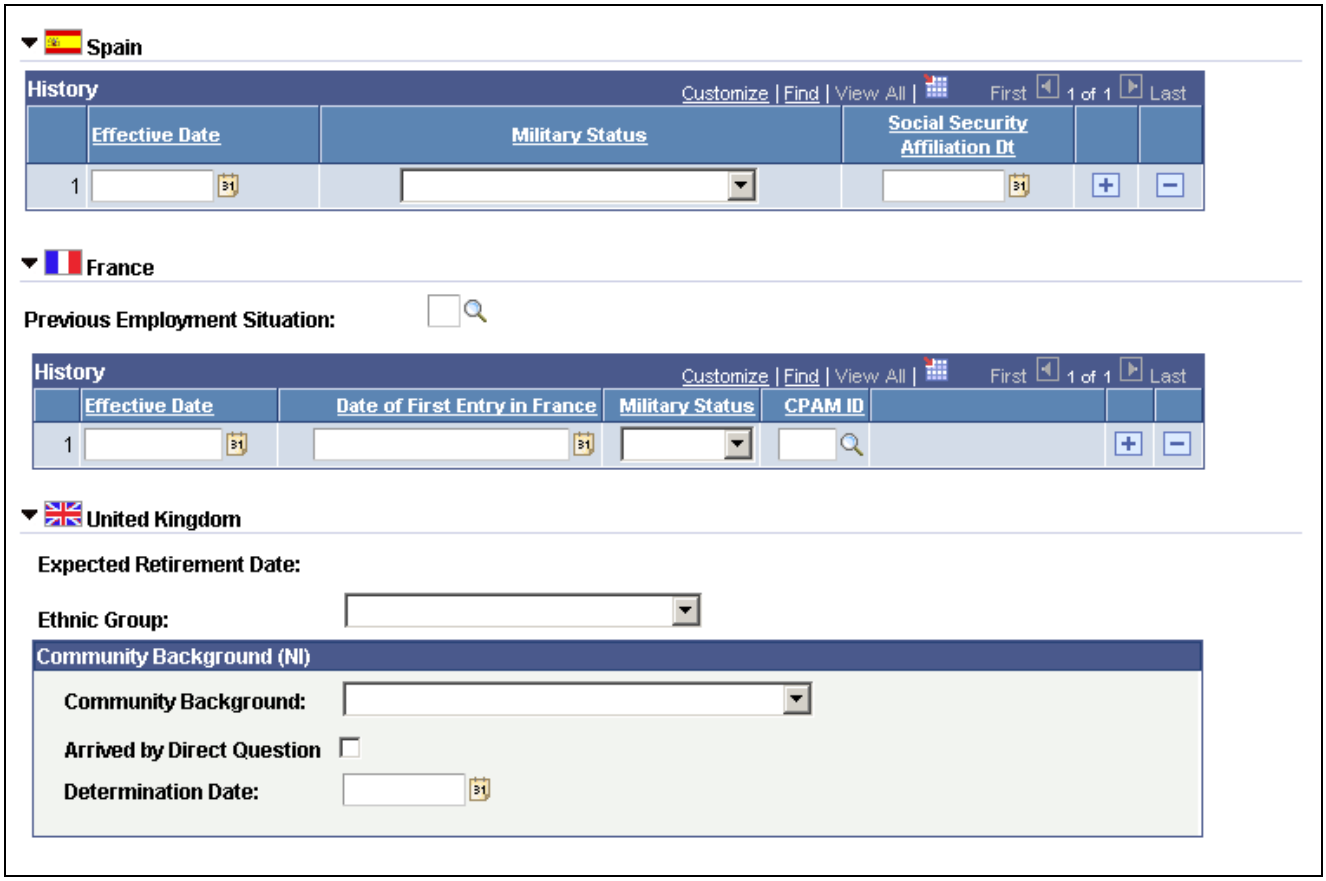
Regional page (2 of 10)



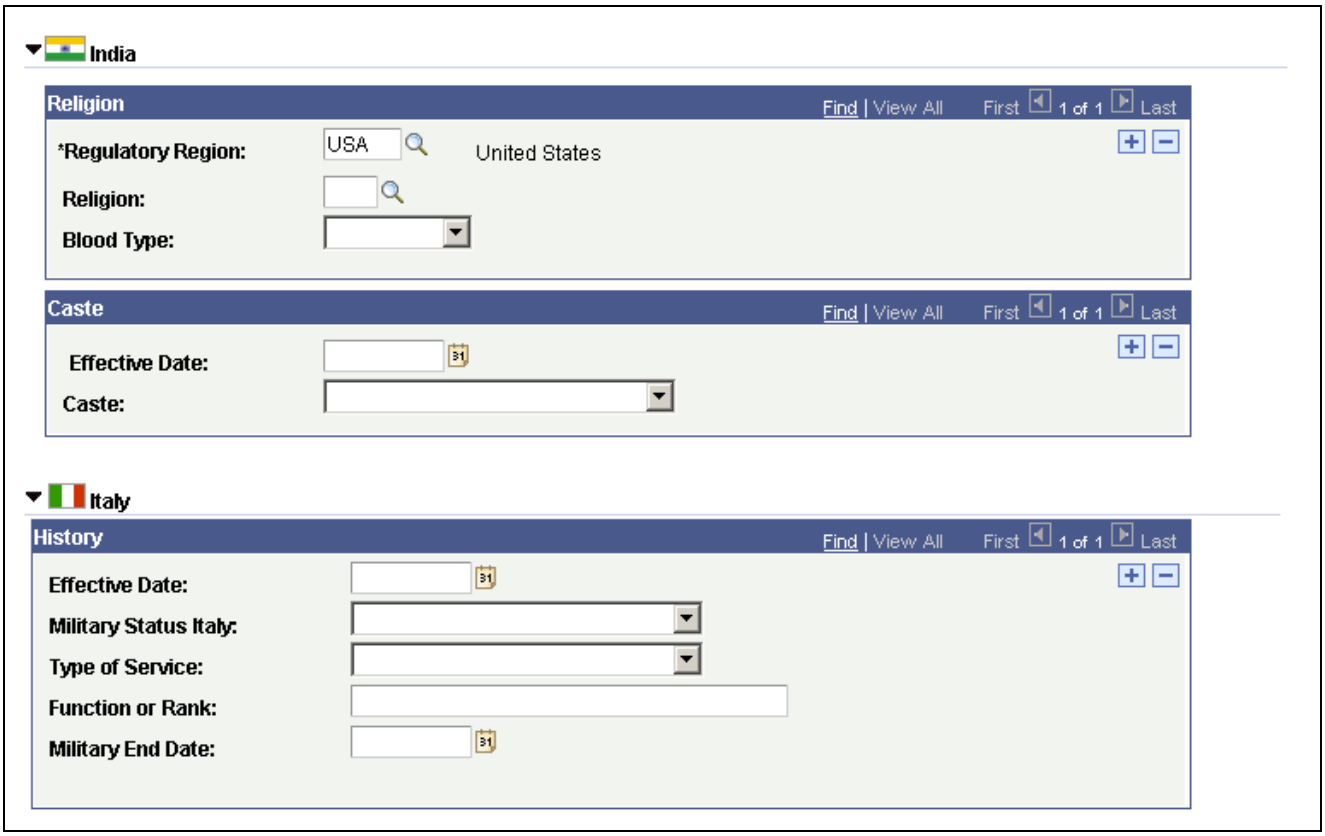
Regional page (3 of 10)



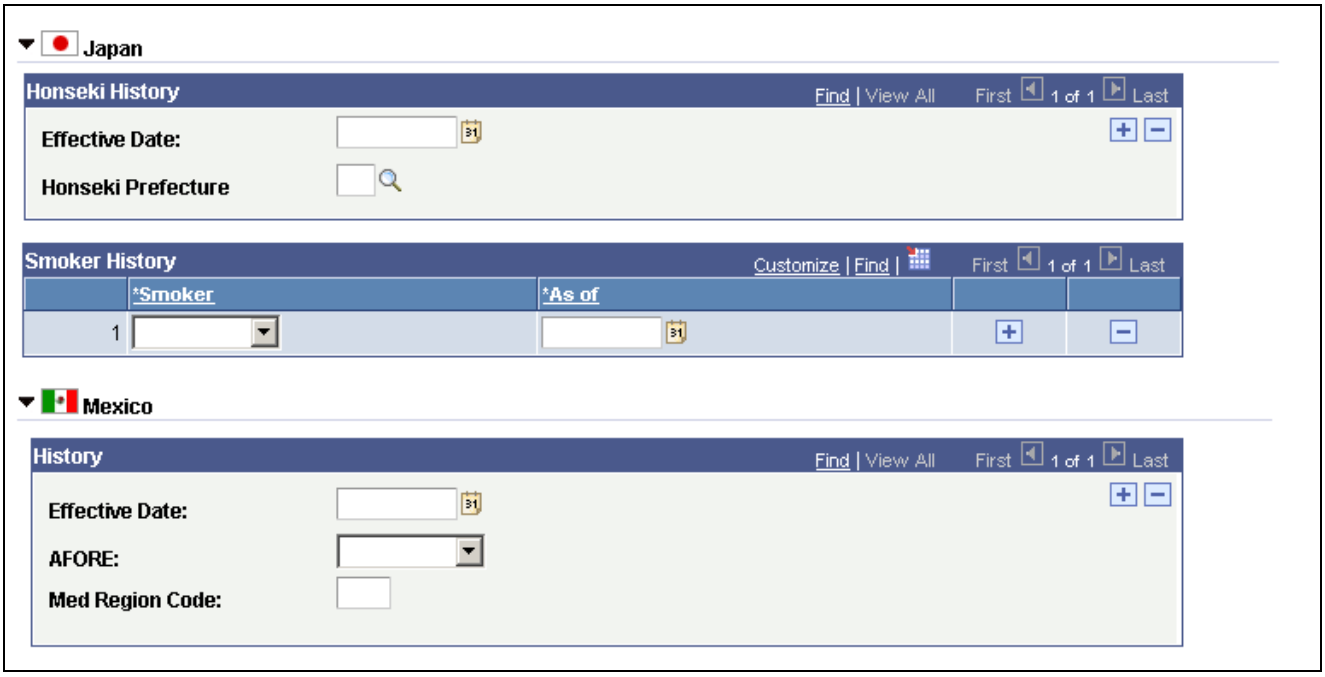
Regional page (4 of 10)



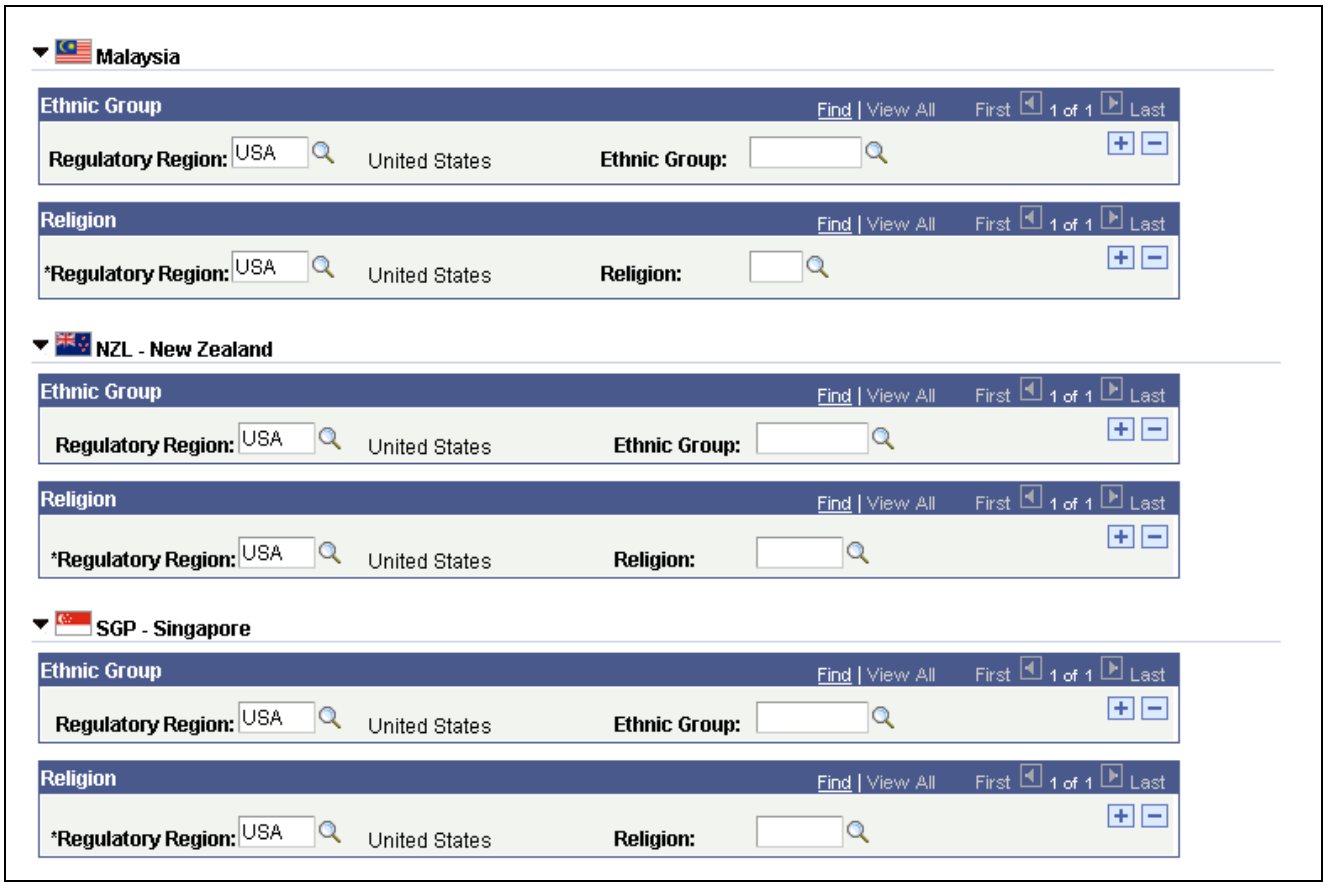
Regional page (5 of 10)



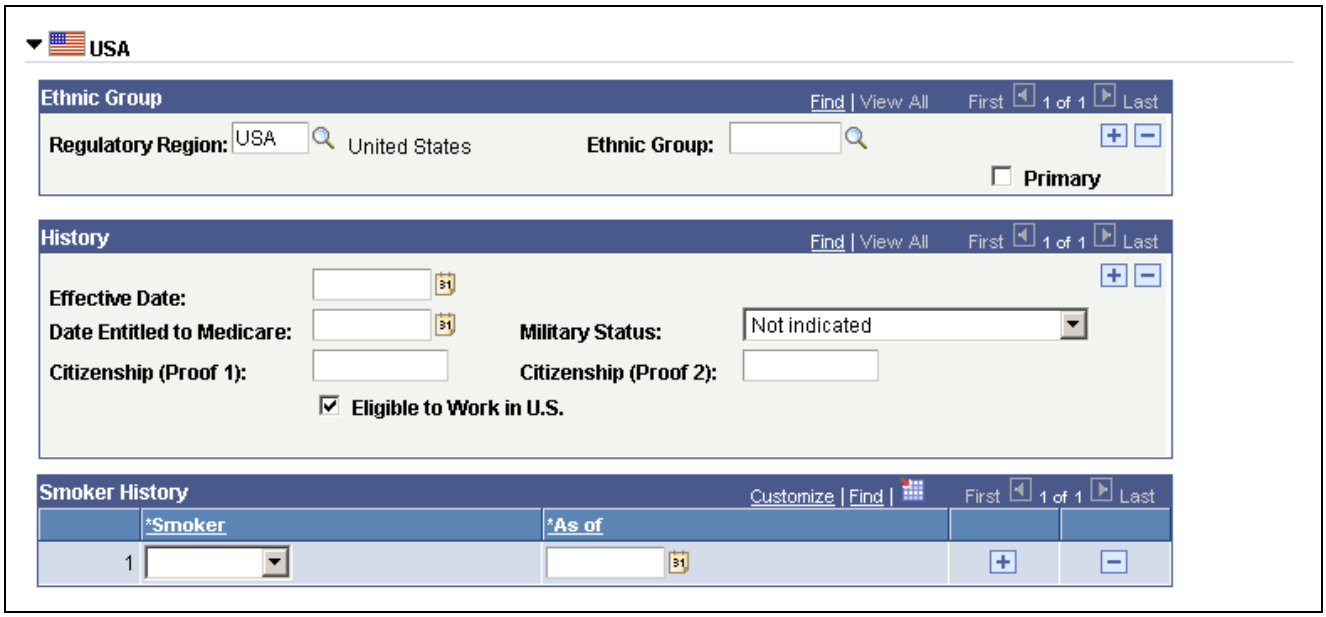
Regional page (6 of 10)



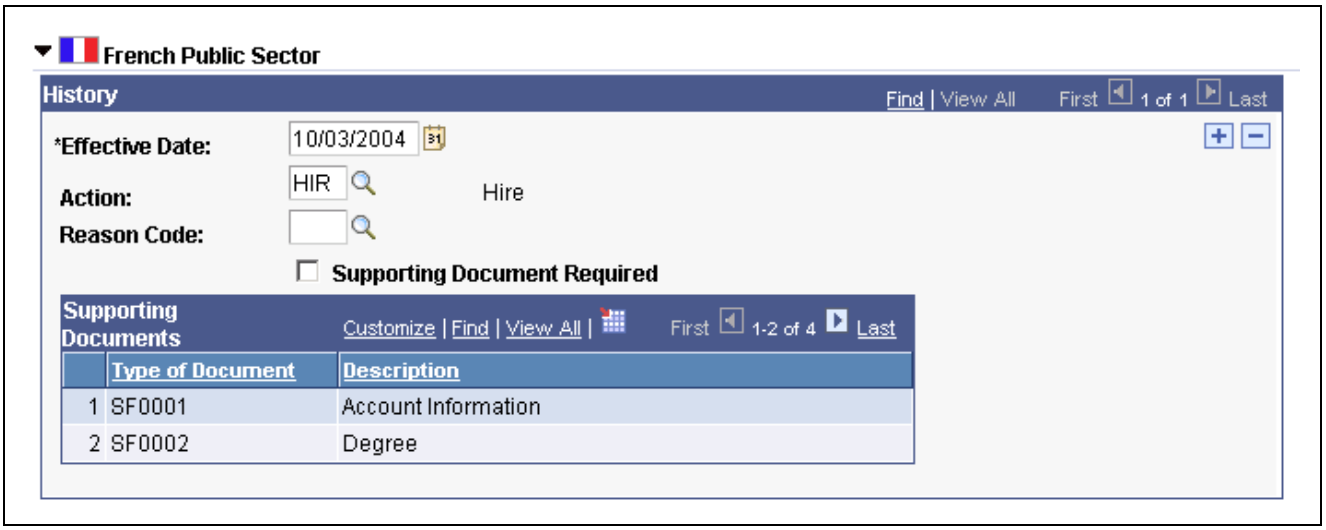
Regional page (7 of 10)



Regional page (8 of 10)



Regional page (9 of 10)



Regional page (10 of 10)

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

(BRA) Brazil

Issued By — Enter the *Registro Geral* (RG) issuing entity. This information is required if you enter the individual's RG number in the National ID group box.

Issued Date and **State** — Enter this information, which is required if you enter the individual's RG number.

Series — Enter the work card number.

Exp Date (expiration date) — Enter the work card's expiration date. This information is required if a *Carteira de Trabalho e Previdência Social* (CTPS) number is provided.

State — Enter the political subdivision of the CTPS issuing agency. This information is required if a CTPS number is provided.

Zone, Section, City, and **State** — Enter this information, which is required if a voter registration card is provided.

Series, Region, and **Category** — Enter this information, which is required if a reserve certificate is provided.

State — Enter the political subdivision of the issued reserve certificate. This information is required if a reserve certificate is provided.

Cert Type (certificate type) — Enter the type of military service. Values are: *Aeronautic, Army, Marine,* or *Other.* This information is required if a reserve certificate is provided.

Inscription Date — Enter the date of registration at PIS / PASEP. This information is required if the PIS/PASEP number is provided in the National ID group box.

(CAN) Canada

Visible Minority — Select a code to indicate if the person's ethnic background is apparent based on physical appearance.

Aboriginal Person Select if the person is a Canadian aboriginal person.

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

Health Care Number and **Health Care Province** Enter a number and select the health care province.

(CHE) Switzerland

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

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

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

(DEU) Germany

Expected Military Date If the person hasn't already completed military service, enter the date when service is expected to begin.

HR Responsible ID Select the ID of the human resources representative responsible for this person.

Nationality Date Enter the effective date of the person's nationality status. If the employee is a native citizen of the country, enter the person's birth date. If the person is a naturalized citizen, enter the date on which the person became a citizen.

Nationality Enter the person's nationality by selecting a nationality code.

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

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

(ESP) Spain

Social Security Affiliation Dt (social security affiliation date) Enter the date when the person is assigned a Spanish social security number.

(FRA) France

Date of First Entry in France Leave blank if the person is a native-born French citizen. If the person is foreign-born, enter the date on which the person first arrived in France. This

data is used to maintain work visa information for foreign workers who are employed in France.

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

(FPS) French Public Sector

The information that you enter here is mandatory for including an employee in the French Public Sector security system.

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

(GBR) United Kingdom

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

A person's expected retirement date is based on the birth date that you enter on the Name/Location page. For men in the U.K., the expected retirement date is always the 65th birthday. For women, it is the 60th birthday. The British government is introducing measures to raise the state pension age for women. The retirement age for women will gradually increase to 65 years between 2010 and 2020. This table shows the expected retirement dates for women in the U.K.:

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

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

(GBR) Community Background

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

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

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

Determination Date Enter the date on which you determine the person's community background category.

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

(IND) India

Blood Type Select the person's blood type or select *Unknown*. When the blood type is entered on this page at the time that an employee is hired, a component interface updates the employee's blood type on the physical exam record. Thereafter, this field is disabled and displays by default the blood type data from the physical exam record.

Caste Select the person's caste.

(ITA) Italy

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

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

Military End Date Indicate the date on which the person's military service ended, if applicable.

(JPN) Japan

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

(MEX) Mexico

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

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

(MYS) Malaysia and (SGP) Singapore

In Malaysia and Singapore, you use the Ethnic Group and Religion fields for eligibility and calculation of festive advances.

(USA) United States

Date Entitled to Medicare (Optional) Enter the date on which this person is entitled to receive Medicare coverage.

Citizenship (Proof 1) and **Citizenship (Proof 2)** Enter two forms of ID (for example, *passport* and *Social Security card)* to prove U.S. citizenship (required by U.S. law).

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

See Also

Chapter 3, "Setting Up Country-Specific Tables," Understanding French Social Security Tracking Code Maintenance, page 22

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements, "(CAN) Meeting Regulatory Requirements for Canada"

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Maintaining Payroll Data"

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Benefits, "Setting Up Base Benefits Core Tables"

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up Local Country Functionality," (JPN) Setting Up Japanese Control Tables

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Understanding HRMS," Effective Dates

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Working with Languages"

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Working with System Data Regulation in HRMS," Understanding PeopleSoft HRMS System Data Regulation

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Benefits, "Setting Up Base Benefits Core Tables"

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS 8.9 Application Fundamentals Preface," Common Elements Used in PeopleSoft HRMS

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements, "(AUS) Meeting Regulatory Requirements for Australia"

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements, "(CAN) Meeting Regulatory Requirements for Canada"

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements, "(FRA) Meeting Regulatory Requirements for France"

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage French Public Sector, "Updating Employee Records," Tracking Supporting Documents

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements, "(GBR) Meeting Regulatory Requirements for the United Kingdom"

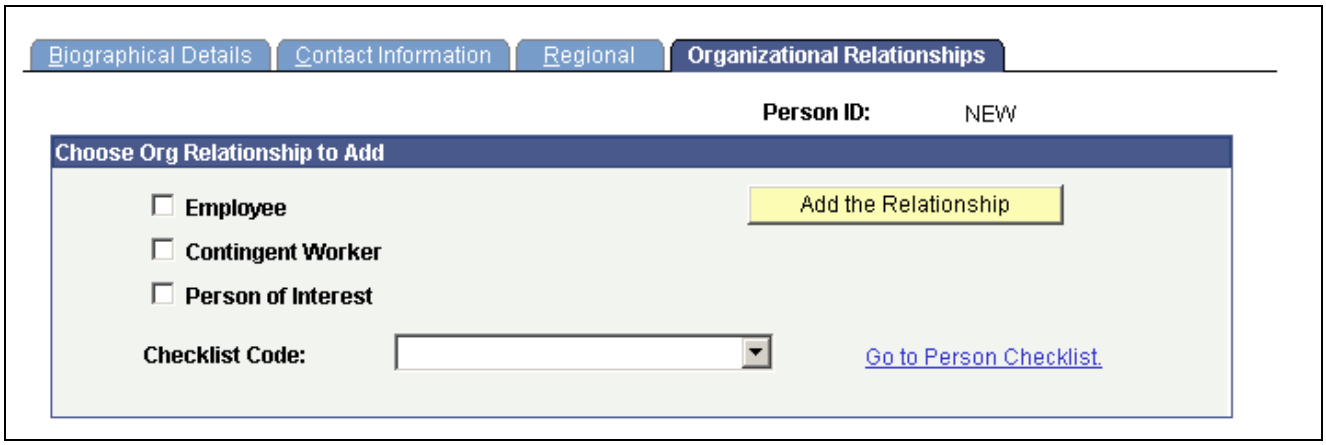
PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements, "(USA) Meeting Regulatory Requirements for the United States"

PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler

PeopleTools 8.45 PeopleBook: PeopleTools Global Technology

Creating Organizational Relationships and Maintaining Checklists

Access the Organizational Relationships page.



Organizational Relationships page

Choose Org Relationship to Add

Select Employee, Contingent Worker, or Person of Interest to indicate the organizational relationship of this person.

If you select Person of Interest, select one of the available person of interest types:

- *External Instructor*
- *External Trainee*
- *Global Payroll Employee*
- *Other*
- *Stock - Board Member*
- *Stock - Non-HR Employee*

You can assign any of the POI types that are defined on the POI_TYPE_TBL. After a person is created, the POI relationships can be added in various places. POIs without Jobs can be added from Enterprise Learning and from within Campus Solutions. POIs with Jobs relationships are created from within the relevant applications, such as Stock, Global Payroll, Absence Management, Benefits, and Pension.

To create a checklist for the person on the Employee Checklist page at the same time, select the appropriate checklist.

Note. Contingent workers are not paid in Payroll for North America. Customers using the E&G contract pay functionality, need to add contract workers using the Add Employment Instance component or select Employee on the Organizational Relationships page.

Add the Relationship Click this button to save the data on this component. If you selected Employee or Contingent Worker, the system moves you to either the New Employment Instance component (JOB_DATA_EMP) or the New Contingent Worker Instance component (JOB_DATA_CWR).

If you select Person of Interest, the system will move you to either the Person of Interest Job Data component (JOB_DATA_POI) or the Add a POI Reltn to a Person component (PERS_POI_ADD), depending on the POI type you selected.

Note. You can only select one relationship when you create the Personal Data record, but you can create additional relationships directly from the New Employment Instance, New Contingent Worker Instance, Add Person of Interest Job, and Add a POI Type to a Person components.

Note. If you create a person but do not create and save a job data record or POI type record for them, the system will save the person as a POI without job with a POI Type of Unknown. When you do create and save a record for the person on the Add an Employment Instance component, Add a Contingent Worker component, Add a POI Instance component, or Add a POI Reltn. component, the system will delete the Unknown POI without job instance for that person.

(FPS) French Public Sector

If you have French Public Sector installed and you select Employee, you select one of these types of employee:

- *Commercial Employee*
- *French Public Sector Employee*

If you select *French Public Sector Employee,* the system displays these fields: Business Unit, Department, and Job Code. Complete these fields for the new employee.

Use the *French P Sector Employee* checklist for French public sector employees.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage French Public Sector*, "Hiring French Public Sector Employees".

See Also

Chapter 4, "Adding a Person in PeopleSoft Human Resources," Controlling Data Access for POIs Without Jobs, page 73

Chapter 5, "Increasing the Workforce," Adding Organizational Instances for Employees, Contingent Workers, and POIs, page 83

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "(E&G) Administering Contract Pay"

Controlling Data Access for POIs Without Jobs

This section provides an overview of security for POIs without jobs and discusses how to add and maintain POI types.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Understanding Security for POIs Without Jobs

When a POI does not have a job record you need to enter additional information about them in order to control user access to their data.

Data access for POIs without jobs is primarily controlled by POI type. Assign the person a POI type in the Add a POI Relationship component (PERS_POI_ADD) or Maintain a Person's POI Reltn component (PERS_POI_MAINTAIN).

You can add additional security criteria by assigning the person to one or more business units, locations, or institutions.

For example, a person has the POI type of External Instructor and the following security types:

Security Type	Security Key
Location	CCBC1
Business Unit	CFBBU
Institution	PSSTA

The following users have access to this person:

- User A, who has access to all External Instructor POIs.
- User B, who has access to all External Instructor POIs in the location CCBC1.
- User C, who has access to all External Instructor POIs in the business unit CFBBU.
- User D, who has access to all External Instructor POIs in the institution PSSTA.

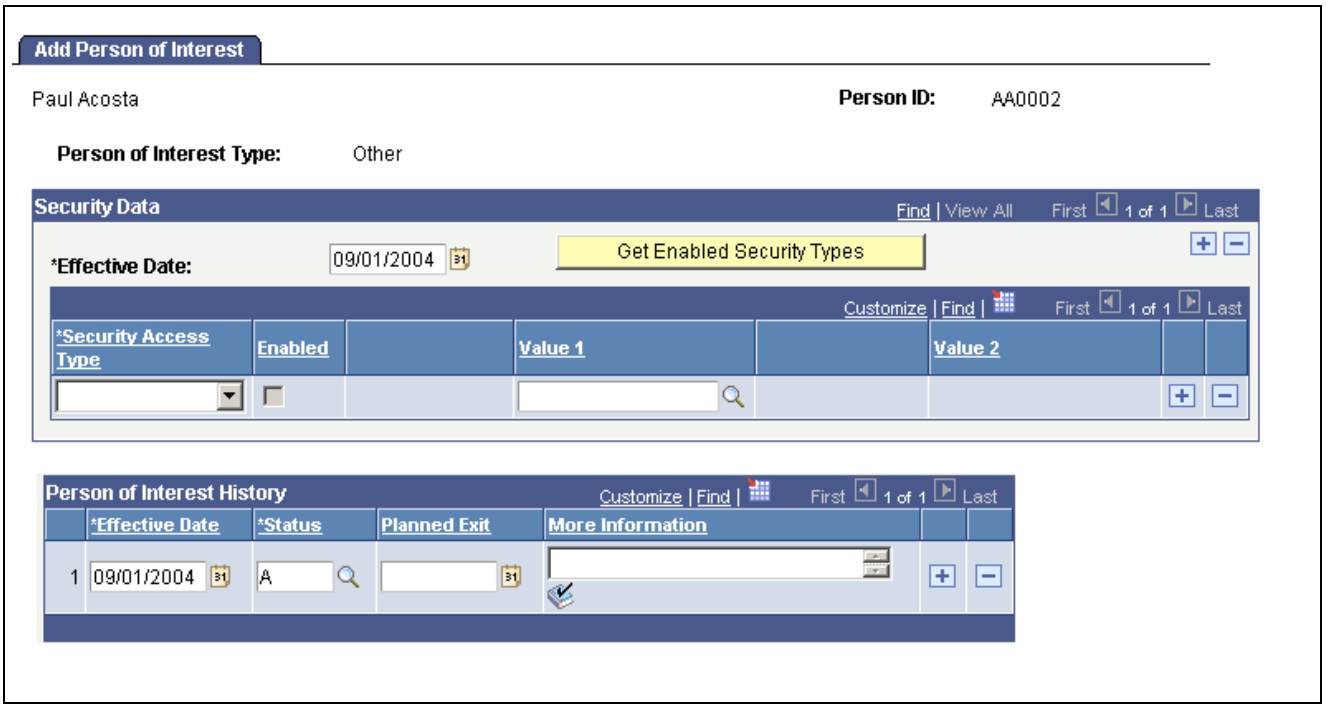
Note. Data permission security for employees, contingent workers, and POIs with jobs is controlled by data you enter on the person's job record.

Pages Used to Control Access to the Data of POIs Without Jobs

Page Name	Object Name	Navigation	Usage
Add Person of Interest, Edit POI Relationship	PER_POI_TRANS	• Workforce Administration, Personal Information, Organizational Relationships, Add a POI Relationship, Add Person of Interest • Workforce Administration, Personal Information, Organizational Relationships, Maintain a Person's POI Reltn, Per Poi Trans	Use these pages to set up and maintain a person of interest's POI type and security access keys.

Adding and Maintaining POI Types

Access the Add Person of Interest page or the Edit POI Relationship page.



Add Person of Interest page

Person of Interest Type Select a person of interest type when you create a record for the person. You can create multiple records for a person with different POI types on the Add New POI Type component.

Security Data

Get Enabled Security Types Click to add a row to the Security Data grid for each security type that has been enabled for the people without jobs.

Security Access Type To restrict user access to this person's data using values in addition to the POI type, select a security access type.

Security Key 1 and **Security Key 2** If you select a security access type of *Business Unit* or *Institution,* select the business unit or institution associated with this person for security purposes.

If you select a security access type of *Location*, first select the appropriate business unit for the location's SetID in Security Key 1 and the location associated with this person for security purposes in Security Key 2.

Add the Specific Transaction Click to move to the component that tracks additional data for this POI type.

You can enter multiple rows in this group box to set up multiple security access types and keys. PeopleSoft includes the Business Unit, location, and institution security types as part of the system data. You can choose to disable any of these security types.

Click the Get Enabled Security Types button to find out which security types are enabled. You can enter data for a type that has not been enabled, allowing you to capture additional data on a POI without a job without having to modify the system. To do this, you must create a new security type on the Security Access Type page for the People without Jobs Security Set and enter a new field name. Then use the new field name in this component and capture the required data for this POI.

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, “Setting Up and Administering HRMS Security”.

Person of Interest History

Maintain a history of this person of interest type using the effective date field and by adding new rows as necessary. Make the person inactive if they are not being used in system.

Note. Some of the POI Types without Jobs use application-specific transaction tables to capture the history of this relationship. The system makes this table available for External Trainee or Other POIs. You can track information about Students and External Instructor POIs on other system components intended for this purpose For example, the External Instructor POI Type is tracked in the Enterprise Learning Instructor Table components. This is defined on the POI Type setup table.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Training*, “Defining Training Courses and Programs,” Setting Up Course Instructors.

See *PeopleSoft Enterprise Learning Management PeopleBook*

Planned Exit Select the date the person will exit this person of interest type, if known. This field is for information only.

CHAPTER 5

Increasing the Workforce

This chapter provides overviews of job data, user security considerations, and discusses how to:

- Add organizational instances for employees, contingent workers, and persons of interest (POIs).
- Add additional assignments.
- Review organizational relationships.
- (BRA) Run Brazil employment reports.
- (CAN) Run the Canadian Hire List report.

Understanding Job Data

You can add a new job record to the system in several ways. Each way uses its own component. Although the components are made up of the same pages, each one is configured to help you enter the correct data for a particular situation.

Before you create a job record for a person, you must add them to the system in the Personal Information component (PERSONAL_DATA_ADD).

See Chapter 4, "Adding a Person in PeopleSoft Human Resources," page 55.

Component	Menu	Use To
Add Employment Instance (JOB_DATA_EMP).	• Workforce Administration, Job Information • Workforce Administration, Personal Information, Organizational Relationships	Add a new employment organizational instance for a person who doesn't have applicant information in the system.
• (FPS) Hire Employee (EE_HIRE). • (USF) Hire Employee USF (EE_HIRE).	(FPS) Workforce Administration, Increase Workforce, FPS Business Rules. (USF) Workforce Administration, Increase Workforce.	Add a new employee who doesn't have applicant information in the system.

Component	Menu	Use To
• Hire (ER_APP_HIRE_LAUNCH). • (AUS) Copy Applicant to Employee AUS (PKG_APP_CPY). • (FPS) Hire. • (USF) Hire USF (ER_GVT_HIRE_LAUNCH).	Recruiting, Hire Applicants Recruiting, Hire Applicants, FPS Business Rules.	Add a job applicant with information in the system, added through the Recruit Workforce business process. When you use these components to hire an applicant, the information that you've already entered in the system becomes part of the worker's record, including the referral source information. You assign IDs to job applicants differently than you do to people who are added to the system through the Personal Data component. All other fields on these pages are documented in this chapter. **Note.** (USF) Federal users can find information on hiring job applicants in the Recruit Workforce business process. (FPS) French Public Sector users can find information on hiring job applicants in the Recruit Workforce business process. (AUS) Australian users can find information on hiring job applicants in the Recruit Workforce business process.
Add Contingent Worker Instance (JOB_DATA_CWR).	• Workforce Administration, Job Information • Workforce Administration, Personal Information, Organizational Relationships	Add a contingent worker organizational instance.
Add POI Instance (JOB_DATA_POI).	• Workforce Administration, Job Information • Workforce Administration, Personal Information, Organizational Relationships	Add a POI organizational instance for a person who does not comprise the workforce but for whom you require a job record.
Add Additional Assignment (ADD_PER_ORG_ASGN). (FPS) Add Concurrent Empl Record FPS (HIRE_DATA_BIS). (USF) Concurrent Hire USF (EE_CONC_HIRE).	Workforce Administration, Job Information **Note.** Access the Concurrent Job component from the Add Additional Assignment component (ADD_PER_ORG_ASGN).	Add an additional employment instance for an employee or contingent worker.
Job Data (JOB_DATA).	Workforce Administration, Job Information	Update (including adding temporary assignments) the job record of an employee, contingent worker, or POI.

Each of these components consist of the same job data pages. The data that you enter on these pages is used throughout PeopleSoft Enterprise Human Resources and PeopleSoft Enterprise HCM to manage the people in the system. The process of entering additional data for employees or contingent workers that is not covered in the job data pages discussed in this chapter can be found elsewhere in this PeopleBook.

Note. The components that you use to add and update job records are made up of a number of different pages. To navigate through the entire component, click the Job Data, Employment Data, Earnings Distribution, and Benefits Program Participation links at the bottom of the pages.

See Chapter 6, "(USF) Hiring Employees," page 141.

See Chapter 9, "Managing Country-Specific Workforce Data," page 265.

See Chapter 13, "Updating Person and Job Information," page 339.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage French Public Sector*, "Hiring French Public Sector Employees".

Understanding the Job Data Pages

The information that you enter when you add a new employment, contingent worker, or POI instance is the foundation for most of the business processes that you carry out later. That information includes the following:

- General employment information.

  Includes business title and work phone. This information is optional, but useful for reporting purposes.

- Specific job data.

  Includes the person's department, job code, company, supervisor, and compensation information.

- Earnings data.

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

- Benefits program.

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

Differences Between the Add Employment Instance, Add Contingent Worker Instance, and Add POI Instance Components

The Add Contingent Worker Instance and Add POI Instance components are almost identical to the Add Employment Instance component with the following exceptions:

Page	Add Employment Instance Fields	Add Contingent Worker Instance Fields	Add POI Instance Fields
Work Location	The default value for the Action field is *Hire*	The default value for the Action field is *Add Non-Employee*	The default value for the Action field is *Add Person of Interest*
Work Location	Payroll Status	Job Status	Job Status

Page	Add Employment Instance Fields	Add Contingent Worker Instance Fields	Add POI Instance Fields
Payroll	Employee Type	Pay Type	Pay Type
Employment Information		Provider ID	Provider ID

Security Considerations for Users Managing Employees and Contingent Workers

PeopleSoft Enterprise Human Resources enables human resources administrators to create job records for people in departments that they can't access for updates. This enables them to transfer workers from one department to another.

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

Managing Job Data When You Use the Manage Positions Business Process

If you drive part or all of PeopleSoft Enterprise Human Resources by position, the process of adding a new job data record is somewhat different from the one that is described in this chapter. You still enter some data on the pages that are described in this chapter, but because you've already set up most job-related data on the Position Data component (POSITION_DATA), the system inserts default data automatically in many fields.

Full Position Management	Partial Position Management
Position-related fields are unavailable for entry in several Administer Workforce pages. When you select a position number for the person in the Position Number field, the system updates the position-related fields with the values associated with the position in the Position Data component.	The position-related fields are available for entry until you enter a position number in the Position Number field and move out of the field. The system updates the position-related fields with the values associated with the position in the Position Data component and makes them unavailable for entry.

Adding Versus Updating Job Records

After you set up job records for a member of the workforce, you can enter more data, build a comprehensive history of the person's career with the organization, and support workforce-related planning and decision-making for all areas of the organization.

The pages that you use when you add an organizational instance are the same ones that you use later to update existing job data records but are contained on different components. Use the Job Data component to update job data information.

Warning! PeopleSoft can't guarantee the results if you use the Add Employment Instance, Add Contingent Worker Instance, Add POI Instance, or Add Additional Assignment components to modify existing data. Use these components only when creating a new organizational instance.

See Chapter 13, "Updating Person and Job Information," page 339.

See Chapter 15, "(USF) Administering Personnel Action Requests," page 393.

(JPN) Assigning Internal Identification Numbers

This feature enables you to assign to a person's job record identification numbers that have some meaning to the organization . For example, the third digit of an internal ID may indicate employment type; the fifth might indicate work location; and the sixth, job type. You can store a standard ID, which doesn't have meaning and is used for keying the database, and an alternative, meaningful ID that can be changed as the person's circumstances change.

The system assigns IDs to people as you add them to the system in the Personal Information component. The system uses this ID to identify the person in all job records. Enter a meaningful internal ID number for a person in the Internal EmplID field on the Work Location page to capture information about the person's job situation.

You can update the internal ID each time that you insert a new row into the Job Data component. You can see those changes at a glance on the employee's Job Summary page, and you can search employees by their internal IDs.

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

The following examples illustrate how a person's internal emplID changes as their relationship to the organization changes, while their standard ID remains constant.

Example 1

In the Internal EmplID column of the following table, the first two numbers indicate the year (1994) that the person is hired as a full-time employee and the 2 in 20091 indicates part-time employment:

Effective Date	Action	Reason	ID	Internal EmplID	Notes
April 1, 1998	Pay rate change	Merit	45883	94010333	
April 1, 1994	Rehire	New position	45883	94010333	Rehired as full-time employee.
March 31, 1994	Termination		45883	20091	
April 1, 1990	Hire	Temporary assignment	45883	20091	Hired as contingent worker.

Example 2

In the Internal EmplID column of the following table, the first two numbers indicate the year (1990 and 1995) that the person is hired as an employee with the company and the next three numbers indicate the company (014 and 034) that the person is working for:

Effective Date	Action	Reason	ID	Internal EmplID	Notes
May 31, 1996	Transfer	Completion of intercompany transfer	64096	90014278	Transferred back to home company.
May 8, 1995	Transfer	Intercompany transfer	64096	95034278	Transferred to host company.
April 1, 1990	Hire	New graduates	64096	90014278	Hired as a full time employee.

Prerequisites

Before you add a new organizational instance:

- Set up the Administer Workforce control tables.

  See Chapter 2, "Setting Up the Administer Workforce Business Process," page 5.
- Set up the Administer Workforce country-specific control tables.

  See Chapter 3, "Setting Up Country-Specific Tables," page 21.
- Create personal data records for employees, contingent workers, and POIs.

  See Chapter 4, "Adding a Person in PeopleSoft Human Resources," page 55.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Working with Regulatory Regions"

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Installing PeopleSoft HRMS"

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Working with Languages"

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables"

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up Personal Information Foundation Tables"

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up Jobs"

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "(USF) Setting Up Human Resources Management Tables"

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up Banks and Bank Branches"

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up Local Country Functionality"

Adding Organizational Instances for Employees, Contingent Workers, and POIs

This section lists common elements and discusses how to:

- Enter employee job location and position information.
- Enter job information.
- Enter national labor agreement data.
- Enter payroll processing data.
- Enter salary plan information.
- Enter compensation information.
- Enter optional employment-related data.
- Distribute job earnings.
- Specify benefit program enrollment.
- Create a checklist.

See Chapter 5, "Increasing the Workforce," Adding Additional Assignments, page 130.

Common Elements Used in this Section

Benefits Program Participation	Click to Access the Benefit Program Participation page.
Cross Border Worker	Select if the person lives in one country and works in another. These people have special tax and social security needs.
Employment Data	Click to access the Employee Information page.
Earnings Distribution	Click to access the Job Earnings Distribution page.
FA Holiday Type (festive advance holiday type)	Select the festive advance holiday type.
Festive Advance Eligible From	Select the date on which the person becomes eligible for the selected festive advance pay program.
Festive Advance Pay Program	Select the festive advance pay program for the person.
Job Data	Click to access the Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Compensation pages.
Military Status	Select the person's current military status.
Owns 5% (Or More) of Company	Select if the person owns five percent or more of the company. The system uses this field to identify highly compensated employees for the Non-Discrimination Testing – 401(k)/401(m) report (NDT004) in the Manage Base Benefits business process of PeopleSoft Enterprise Human Resources.
Regulatory Region	Select the regulatory region.

Religion Select the religion. You set up religion on the Religions page.

Note. (AUS and NZL) Set this field to *Not Applicable.*

Security Clearance If the person receives a security clearance, enter the level of clearance: *Classified, Secret,* or *Top Secret.*

See Also

Chapter 6, "(USF) Hiring Employees," page 141

Chapter 7, "Entering Additional Data in Human Resources Records," page 179

Chapter 13, "Updating Person and Job Information," page 339

Pages Used to Add Organizational Instances for Employees, Contingent Workers, and POIs

Page Name	Object Name	Navigation	Usage
Work Location	JOB_DATA1	• Workforce Administration, Job Information, Add Employment Instance, Work Location • Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance, Work Location • Workforce Administration, Job Information, Add Contingent Worker Instance, Work Location • Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance, Work Location	Enter position and location information for a person's job, including the regulatory region, company, department, and location.

Page Name	Object Name	Navigation	Usage
Job Information	JOB_DATA_JOBCODE	• Workforce Administration, Job Information, Add Employment Instance, Job Information • Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance, Job Information • Workforce Administration, Job Information, Add Contingent Worker Instance, Job Information • Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance, Job Information	Enter information about a person's job, including status, employee class, shift, or standard hours.
Job Labor	JOB_LABOR	• Workforce Administration, Job Information, Add Employment Instance, Job Labor • Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance, Job Labor • Workforce Administration, Job Information, Add Contingent Worker Instance, Job Labor • Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance, Job Labor	Enter National Labor agreement data if the employee or contingent worker belongs to a National Labor agreement.

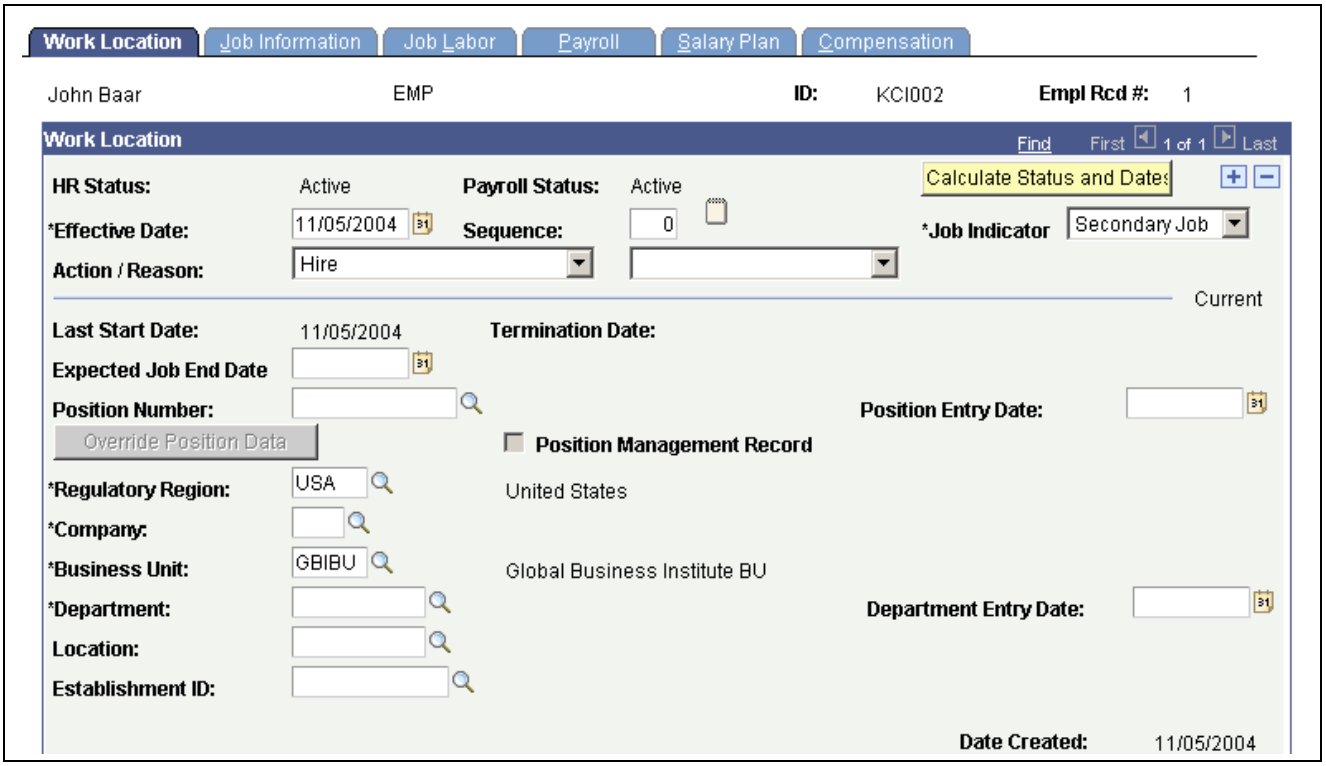
Page Name	Object Name	Navigation	Usage
Payroll	JOB_DATA2	• Workforce Administration, Job Information, Add Employment Instance, Payroll • Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance, Payroll • Workforce Administration, Job Information, Add Contingent Worker Instance, Payroll • Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance, Payroll	Enter payroll processing data. The payroll system and pay group information that you enter here affects component compensation processing on the Compensation page.
Salary Plan	JOB_DATA_SALPLAN	• Workforce Administration, Job Information, Add Employment Instance, Salary Plan • Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance, Salary Plan • Workforce Administration, Job Information, Add Contingent Worker Instance, Salary Plan • Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance, Salary Plan	Enter information about a person's salary plan.

Page Name	Object Name	Navigation	Usage
Compensation	JOB_DATA3	• Workforce Administration, Job Information, Add Employment Instance, Compensation • Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance, Compensation • Workforce Administration, Job Information, Add Contingent Worker Instance, Compensation • Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance, Compensation	Enter compensation information.
Employment Information	EMPLOYMENT_DTA1	Click the Employment Data link at the bottom of the component. • Workforce Administration, Job Information, Add Employment Instance • Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance • Workforce Administration, Job Information, Add Contingent Worker Instance • Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance	Enter optional data, such as a worker's business title.

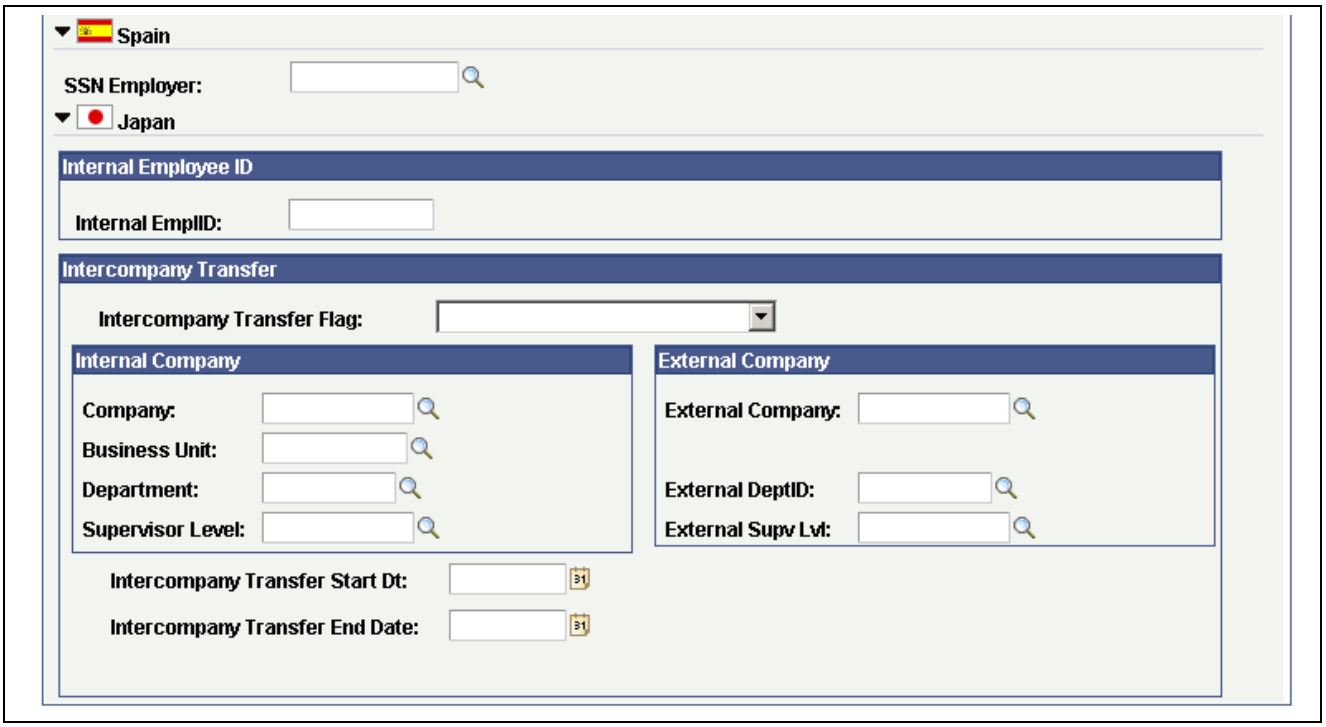
Page Name	Object Name	Navigation	Usage
Job Earnings Distribution	JOB_DATA_ERNDIST	Click the Earnings Distribution link at the bottom of the component. • Workforce Administration, Job Information, Add Employment Instance • Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance • Workforce Administration, Job Information, Add Contingent Worker Instance • Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance	Distribute a person's compensation for one job among different departments, job codes, accounts, shifts, position numbers, or general ledger pay types. If the person's pay is regularly charged to more than one cost center, designate how much to allocate to each cost center.
Benefit Program Participation	JOB_DATA_BENPRG	Click the Benefits Program Participation link at the bottom of the component. • Workforce Administration, Job Information, Add Employment Instance • Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance • Workforce Administration, Job Information, Add Contingent Worker Instance • Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance	Specify the benefit program in which a person is enrolled for benefits in PeopleSoft Enterprise Human Resources or PeopleSoft Enterprise Benefits Administration.
Person Checklist	PERSON_CHECKLIST	Workforce Administration, Personal Information, Organizational Relationships, Person Checklist, Person Checklist	To ensure that the human resources administrators perform all the required administrative tasks for a person, create a checklist listing all the items that need to be completed and the person responsible for completing them.

Entering Employee Job Location and Position Information

Access the Work Location page.



Work Location page (1 of 2)



Work Location page (2 of 2)

HR Status Displays the status of the current job record. A person can have an active HR status but an inactive job or payroll status.

Job Status For contingent worker or POI instances. Displays the job status of the current job record.

Payroll Status For employment instances. Displays the payroll status of the current job record. Some changes that you make to this field trigger Retro Pay or Final Check processing.

A Retro Pay Request is triggered by any payroll status change with an effective date that's earlier than or equal to the latest pay end date of a check already paid to the employee.

A Final Check Request is triggered by any payroll status change that's based on one of the action or reason codes that are defined in the Final Check Action/Reason table.

Calculate Status and Dates Click to calculate the person's HR, job, or payroll status and the employment dates if you make changes to the job records that make the old values invalid.

Effective Date Enter the effective date. When you add an instance, the effective date that you enter here becomes the hire and original hire date.

Sequence Use this number to track multiple administrative actions that occur on the same day. The default value is *0,* the correct number for new instances.

Job Indicator Indicate whether this is the person's primary or secondary job for this organizational relationship. Select *N/A* (not applicable) if those selections don't apply to this job. This field is used to process people with more than one organizational instance in a single organizational relationship.

Action/Reason Select the action requiring you to create or modify this record. The system displays a default value when you create a new employment, contingent worker, or POI instance.

Latest Start Enter the most recent start date for this organizational instance.

Expected Job End Date Enter the end date for this job, if known. If you don't know the end date initially, you can enter it later.

If this job is a temporary assignment and you do not enter a date here, you can run the Temporary Assignment w/out End Date report to identify those assignments that do not have an end date. This date is necessary if you want the system to terminate this job and reactivate any substantive job that may be on hold.

The system displays the day before the termination effective date as the termination date.

Termination Date, Last Date Worked, and **Override Last Date Worked** The system displays the day before the termination effective date as the termination date and the date last worked. If you rehire the person, the system clears these fields. When a person returns from leave, the system clears only the Last Date Worked field. If the date is not accurate, select Override Last Date Worked to enter the date.

Position Number If you drive part or all of the system by position, select a position number. Define positions in the Add/Update Position Info component. When you leave the Position field, the system completes position-related fields in the Job Data

component with default data from the Add/Update Position Info component, including job code, department, location, and full- or part-time status. The corresponding fields become unavailable for entry.

PeopleSoft Enterprise Human Resources issues a warning message if you assign a person to a position that is already filled and if the new appointment exceeds the maximum headcount for that position. The system calculates the headcount and displays the appropriate indicator in the Open/Filled field in the Add/Update Position Info component when you change assignments.

Position Entry Date When you leave this field, the system populates it with the effective date. You can override the default.

Override Position Data and **Use Position Data** Click Override Position Data to enter exceptions to the default position data for this person. This opens up the unavailable fields, including Job Code and Department, and you can override the entries that are in those fields. For example, the worker might have a higher salary grade than the standard grade that is associated with the position. When you click Override Position Data, the button becomes the Use Position Data button.

Note. If you override the defaults for position-related data, you must maintain the employee data manually; the system doesn't update the position data on the Job Data pages with data from the Add/Update Position Info component unless you click Use Position Data.

Position Management Record The system selects this check box when you make changes to fields in the Add/Update Position Info component that initiate a system update of fields here. A selected check box indicates that the system inserts a data row on the Job Data pages.

Company If you assign a company to a department in the Department table, a default company code appears, and this field becomes unavailable for entry. If you don't designate a company in the Department table, select a company here.

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

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

Department Select the department code for this person.

When you leave the field, the system inserts a default supervisor's ID on the Job Information page if you enter a default supervisor ID for this department in the Department table.

The system enters default values for the following fields on the Job Data - Payroll page: Employee Type and Pay Group (which you associate with a company in the Company table). Depending upon other data setup, the system might enter a default holiday schedule.

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up Organization Foundation Tables," Setting Up Holiday Schedules.

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

Department Entry Date When you leave the Department field, the system displays the date on which the person is first assigned to this department.

Location Displays the department location if the default location setID that you define in the Department table matches the control location setID that is defined for that business unit in the TableSet Control - Record Group table. You can change the location code.

Note. For workers paid through PeopleSoft Enterprise Payroll for North America, the location that appears here does not determine the person's primary work state and location that appear on the paysheets. You specify that information by selecting a tax location code on the Job Data - Payroll page.

Reports To Displays the name of the manager of the department to which you assign the person. You can override the default. Link the manager to the department in the Department table.

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

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

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

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

Note. (USA) USA regulatory reports require that you associate an establishment ID with a person at the job level.

(FRA) For payroll purposes, you must always assign persons to an establishment.

If a person is assigned to a position, the system enters the establishment ID that is associated with the position's department and makes the field unavailable. If you associate a non-French position with a French person, the field remains available for entry.

Date Created Displays the date on which you enter this record.

(ESP) Spain

SSN Employer (social security number for employer)

Enter the company SSN, as assigned by the Spanish government, that applies to this person.

(JPN) Japan

Internal EmplID (internal employee ID)

Enter the person's internal ID.

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

See Chapter 4, "Adding a Person in PeopleSoft Human Resources," Understanding Identification Assignment, page 55.

(JPN) Intercompany Transfer

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

Intercompany Transfer Flag

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

- *Home Company Information:* Select if another company's worker joins the company in an intercompany transfer.
- *Host Company Information:* Select if one of the workers is on intercompany transfer to another company.

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

Internal Company and **External Company**

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

Business Unit

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

Department and **External DeptID** (external department ID)

Select the home or host department ID. The home or host department ID is a prompt value in the Company Table component (for internal company transfers) for home departments and the IC Transfer Company/Dept page for host departments (external company transfers).

Supervisor Level and **External Supv Lvl** (external supervisor level)

Select the home or host supervisor level of the job at the home company. This value is a prompt value in the Company Table component for home supervisor levels (for internal company transfers) and the JPN IC Transfer Supervisor Lvl page for host supervisor levels (external company transfers).

Intercompany Transfer Start Dt (intercompany transfer start date)

If you enter host data, enter the start date of this intercompany transfer.

Don't enter a date if the action is *RET* (retirement) and the reason is *PIT* (permanent intercompany transfer).

Intercompany Transfer End Date

If you enter host data, enter the expected end date of this intercompany transfer.

Don't enter a date if the action is *RET* and the reason is *PIT*.

The end date must be equal to or later than the effective date of the worker's current job record.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Setting Up the Payroll Process," Defining the Final Check Process

Chapter 10, "(JPN) Tracking Additional Appointments (Kenmu)," page 285

Chapter 11, "(JPN) Tracking Intercompany Transfers (Shukkou)," page 299

Chapter 13, "Updating Person and Job Information," Running Job Data Reports, page 367

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Working with System Data Regulation in HRMS"

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Working with Regulatory Regions"

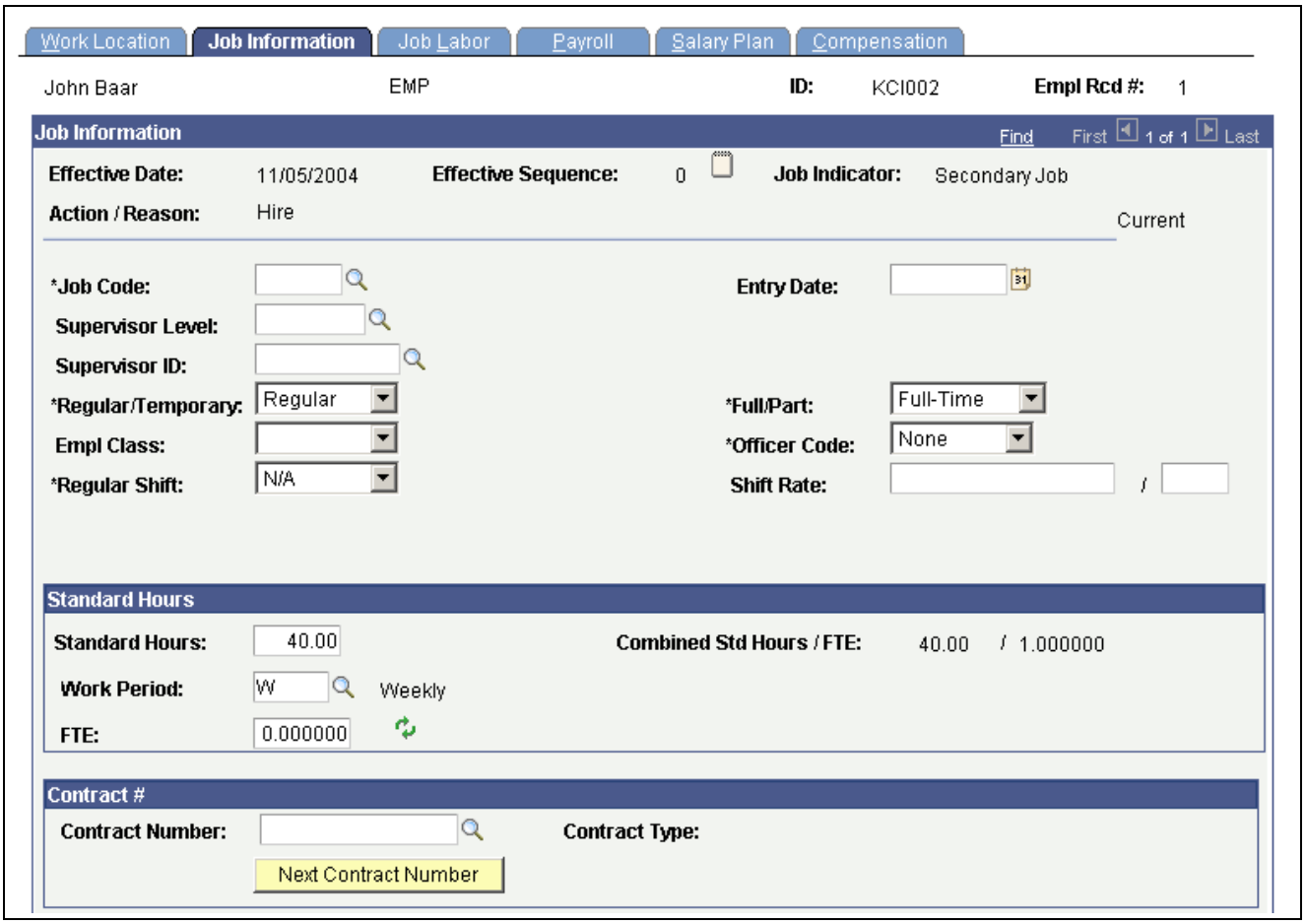
PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," Entering Company Information

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Processing Retro Pay"

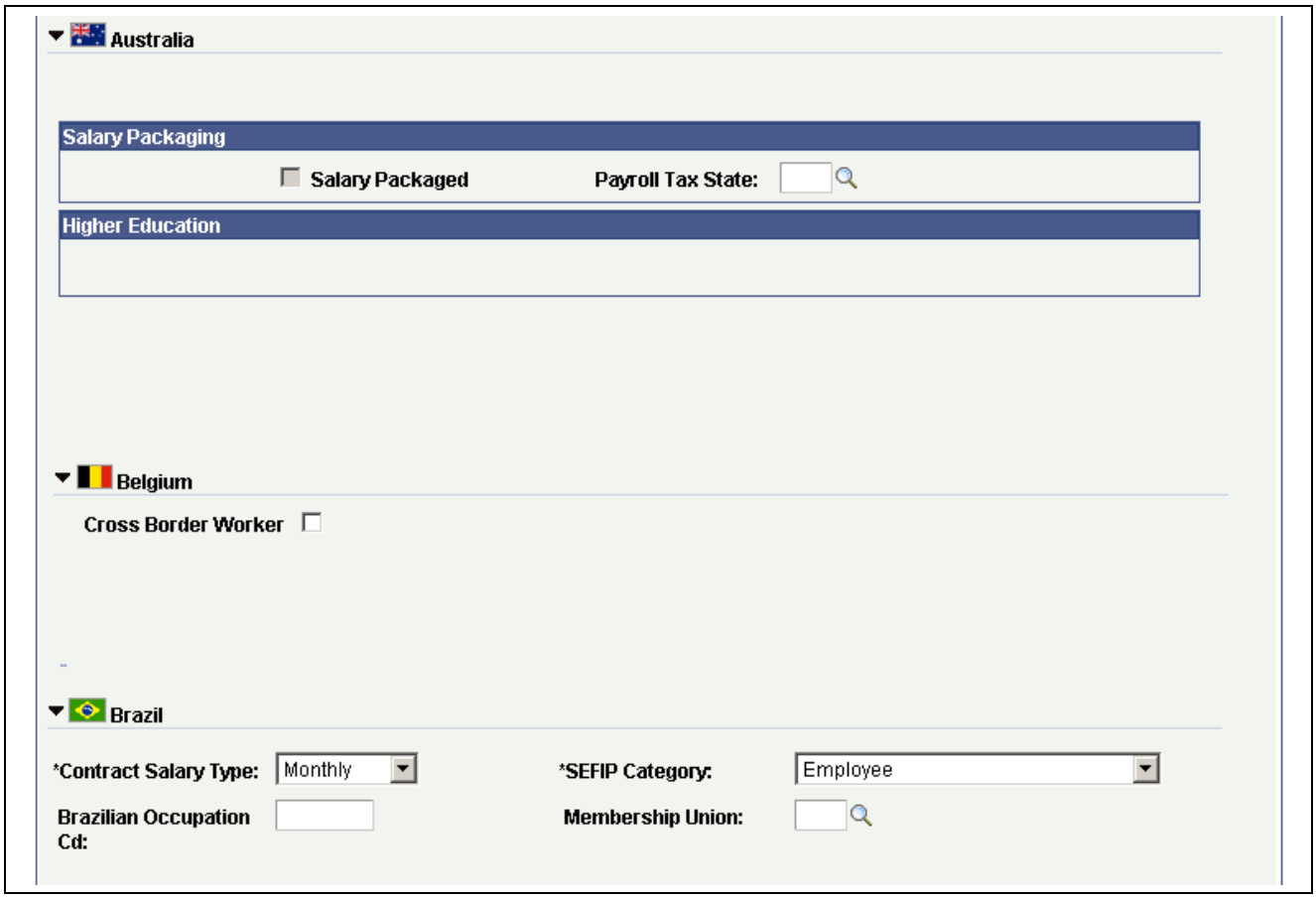
PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Setting Up the Payroll Process," Defining the Final Check Process

Entering Job Information

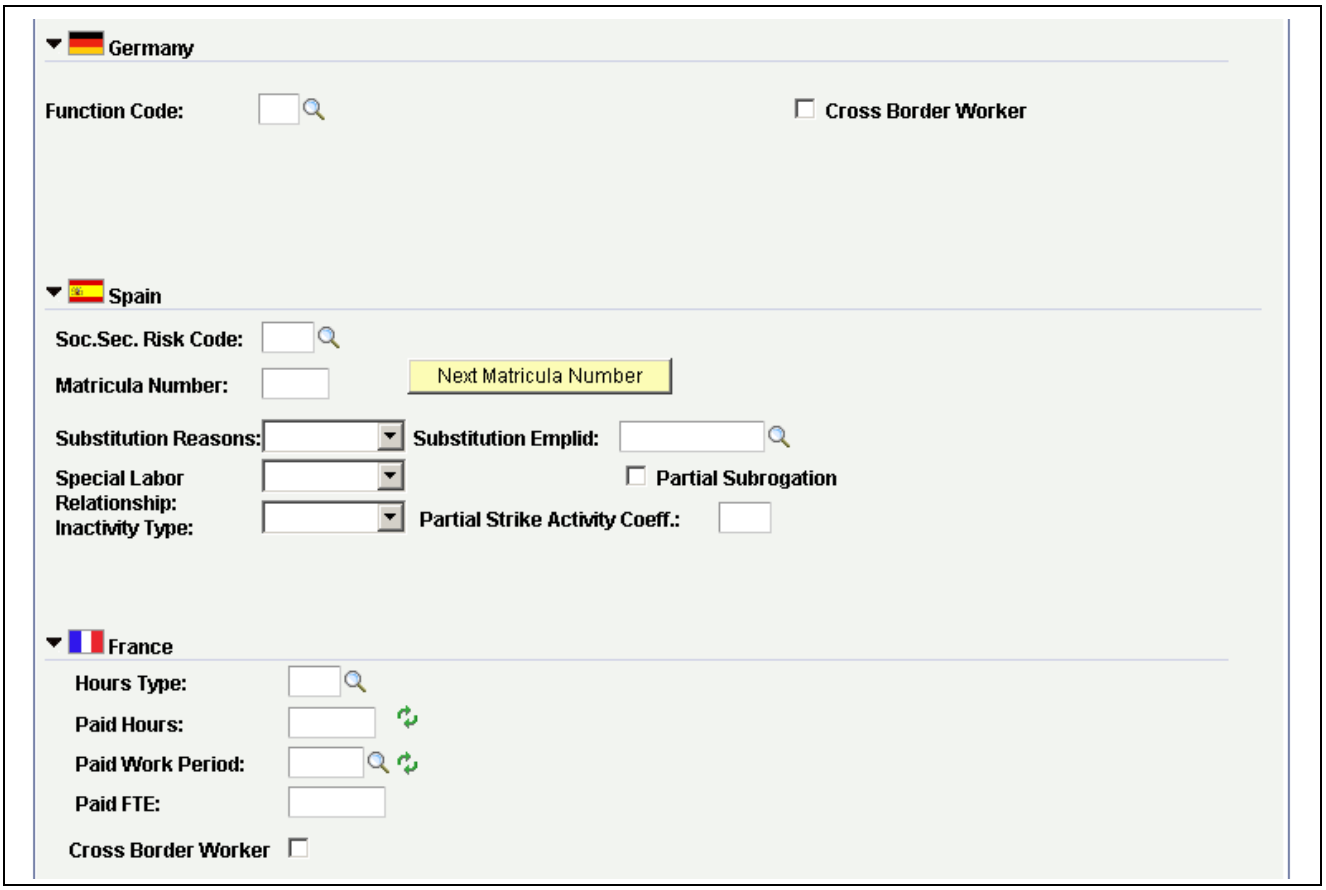
Access the Job Information page.



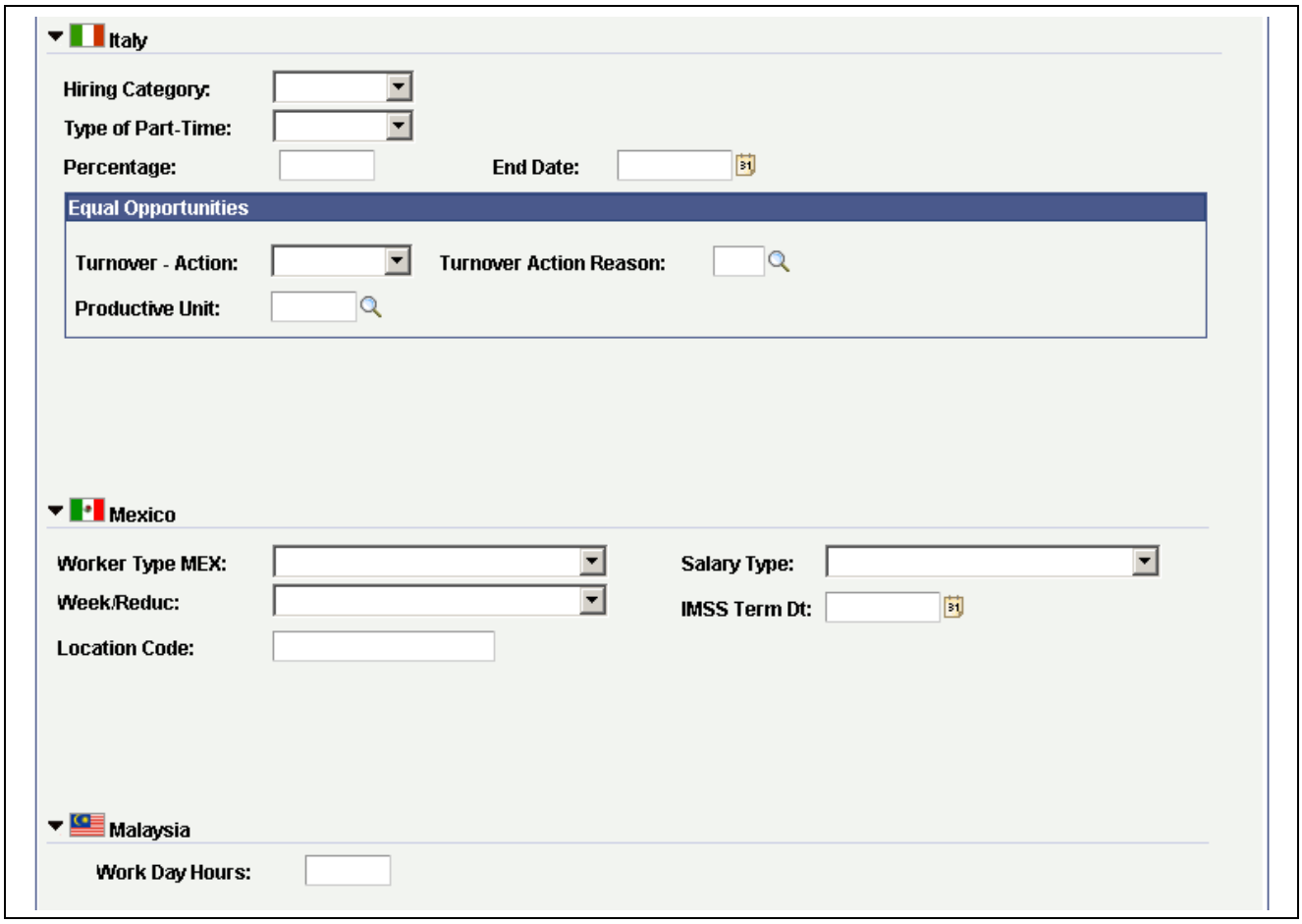
Job Information page (1 of 5)



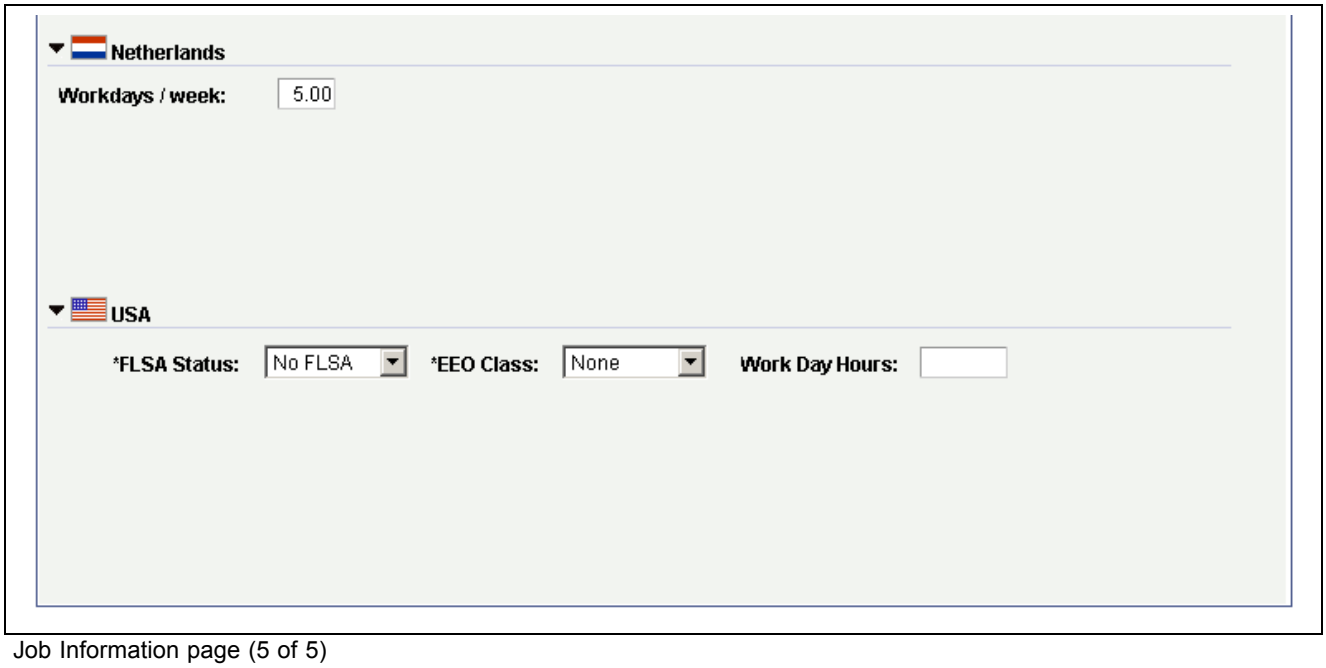
Job Information page (2 of 5)



Job Information page (3 of 5)



Job Information page (4 of 5)



Job Information page (5 of 5)

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

Job Code Select a code.

Note. If you are attaching this person to a labor agreement on the Job Labor page and that labor agreement is associated with job codes, you must select a job code that is valid for the labor agreement.

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

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Labor Administration*, "Setting Up Labor Administration Data," Assigning Job Codes to Labor Agreements.

Entry Date When you leave the Job Code field, the system displays the date on which the person is first assigned to this job code.

End Job Automatically Select to end the job on the specified date. This stops all related processing for payroll and benefits for this job. You must run the Reactivate/Termination Update process if the organization uses this feature. You can use this feature only if the Automatic Job Termination check box is selected on the Installation Table - Product Specific page.

Supervisor ID Enter a supervisor ID, if applicable.

If you use full-position management, don't use this field. If you use partial-position management, and you define a value for the Reports To field for the position number that you assign to this person, the ID field is unavailable.

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

Regular/Temporary Indicate whether the person is a regular or temporary worker.

Full/Part Indicate whether the worker is full-time or part-time.

Note. The Manage Base Benefits business process uses the values that you select in the Regular/Temporary and Full/Part fields to determine eligibility requirements.

PeopleSoft Enterprise Payroll for North America uses the full-time or part-time information in conjunction with the holiday schedule. When a holiday falls within a pay period, Payroll for North America prorates the holiday hours for part-time workers. However, proration is based on the standard hours for the worker, not for the pay group.

Empl Class (employee class) Select an employee class, which provides another method of grouping workers. Values include: *Assignee, Expatriate,* and *Intern.* Employee

classes are included in the Employee Class table. To override, access this page in correction mode.

The list of values depends on the regulatory region that is specified on the Work Location page.

Note. (GBR) The Northern Ireland Fair Employment Monitoring report (UKNI001) uses the employee class to determine the classification of workers. If the organization submits this report, you must use the required employee classes for the report to work correctly.

(JPN) Select *Host ICT* (Hosting Intercompany Transfer) to flag those workers that are hired on an intercompany transfer basis when the company is the host company.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements*, "(GBR) Meeting Regulatory Requirements for the United Kingdom".

Officer Code Identify highly compensated workers for the Non-Discrimination Testing - 401(k)/401(m) report (NDT004). The default value is *None.*

Regular Shift If the worker is working shifts, select the appropriate shift. If the worker doesn't work shifts, leave the Shift Rate and Factor fields blank. The default value is *N/A* (not applicable).

Shift Rate Set up a modified shift differential for this worker only. To apply a shift differential to a group of workers who work the same shift, enter shift information in the Shift table in Payroll for North America. These options are mutually exclusive. You can use only one at a time.

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

Duties Type For jobs where the action or reason is temporary assignment, select the type of duties for the temporary assignment from the Temporary Duties Type table. You can use this feature only if the Automatic Job Suspension check box is selected on the Installation Table - Product Specific page.

Encumbrance Override Select to override encumbrance processing at the job level when you create a new organizational instance or add a concurrent job for a worker.

Standard Hours

Standard Hours Displays by default the standard hours for the worker. Change the default value, if required.

Work Period Select a standard work period, the time period during which workers must complete the standard hours.

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

FTE (full-time equivalency) Displays the percentage of full-time work that the worker should normally work in this job. The system calculates this value based on the standard hours

entry for this job and the standard work period. However, you can override the system-calculated FTE and enter any value. The system issues a warning if you enter a value that is greater than 1.0.

Combined Std Hours/FTE (combined standard hours/full-time equivalent) Displays the total standard hours that are assigned to the worker for all active jobs combined and the worker's total FTE status for all active jobs combined.

For example, if a worker holds two jobs, one as a professor with an FTE of .5 and one as a physician with an FTE of .35, the worker's combined FTE is .85 (*.5 + .35*). You can't change or delete this information.

Note. The combined FTE that appears here may be different from the total FTE that is calculated for benefits administration eligibility. Combined FTE on this page is the sum of a worker's individual FTEs from active jobs only.

Contract

Contract Number Select the worker's contract number, if applicable.

Note. (ESP and FRA) This is a required field when the action is hire, rehire, or transfer for workers who belong to a Spanish or French regulatory region. View the prompt values in the Contract Number field to view all active contracts for that worker. If the worker has no active contracts in the system, click the Next Contract Number button; the system assigns a new contract number. When you save, the system warns you that you must update the contract information for the new contract number that is automatically created for this worker. Access the Contract Data component using the new contract number, and make the necessary updates.

Contract Type Displays the contract type that is associated with the contract number that you select.

(AUS) Salary Packaging

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

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

(AUS) Higher Education

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

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

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

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

(BRA) Brazil

Contract Salary Type Enter the contractual salary code for RAIS.

SEFIP Category Select the worker category for SEFIP.

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

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

Membership Union Enter the union code that details how to calculate and pay the worker's monthly union dues.

(DEU) Germany

Function Code Select the appropriate code for the worker.

(ESP) Spain

Soc. Sec. Risk Code (social security risk code) Enter a code. The Spanish government requires employers to assign a social security risk code that rates the risk of illness, accident, or death that is connected with each type of job. For example, a coal miner is at higher risk than an office manager. You maintain risk codes on the Soc Sec Risk Code page.

Matricula Number Enter a matricula number. The Spanish government requires every worker to have a matricula number. Employers use this number to compile a matricula book that reports workplace statistics to the government. You maintain matricula numbers in the Location table.

Substitution Reasons Select the reason why you are making a substitution for this worker. The AFI report contains this information.

Substitution Emplid Enter the ID of the substitute worker. The AFI report contains this information.

Special Labor Relationship Select to indicate that the job is in a profession considered a special labor relationship. The AFI report contains this information.

Partial Subrogation Select to indicate that the worker is in partial subrogation. The AFI report contains this information.

Inactivity Type If you are making the job data record inactive, select the type of inactivity.

Partial Strike Activity Coeff If the inactivity type is partial strike, enter the coeff.

(FRA) France

Hours Type Select the appropriate hours type from the list. Different hours type options affect a worker's compensation and standard hours.

This field is for information only. No payroll calculation is based on information in this field.

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

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

Paid Work Period Select the period in which the worker should work. If the regulatory region to which the worker is assigned is French, the system inserts the work period that is defined on the Job Code Table - Job Code Profile page as the default value. Values are:

A: Annual

B: Biweekly

C: Contract

D: Daily

F: Every four weeks

M: Monthly

Q: Quarterly

S: Semimonthly

W: Weekly

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

(ITA) Italy

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

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

Percentage Define the percentage of part-time.

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

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

Productive Unit Select the worker's productive unit. You use productive units to group workers based on agreements between unions and employers.

(MEX) Mexico

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

The company must notify IMSS of a worker's termination date five days after the worker leaves. However, there are some exceptions to this rule, such as when a worker is on disability and does not return to the company.

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

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

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

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

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

(MYS) Malaysia

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

(NLD) Netherlands

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

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

(GBR) UK

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

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

Tax Basis Select the basis that is used to calculate the worker's tax.

(USA) United States

FLSA Status (Fair Labor Standards Act status) Displays a value based on the job code that you assign to this worker. FLSA status indicates whether this job is exempt or nonexempt according to the Fair Labor Standards Act. FLSA status also helps determine benefits eligibility in PeopleSoft Enterprise Benefits Administration.

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

EEO Class (Equal Employment Opportunity class) Displays a regulatory status for this job based on the job code that you assign the worker.

Work Day Hours Enter the workday hours. The workday hours information is used in the FLSA calculation for the basic rate formula.

See Also

PeopleSoft Enterprise Global Payroll 8.9 PeopleBook

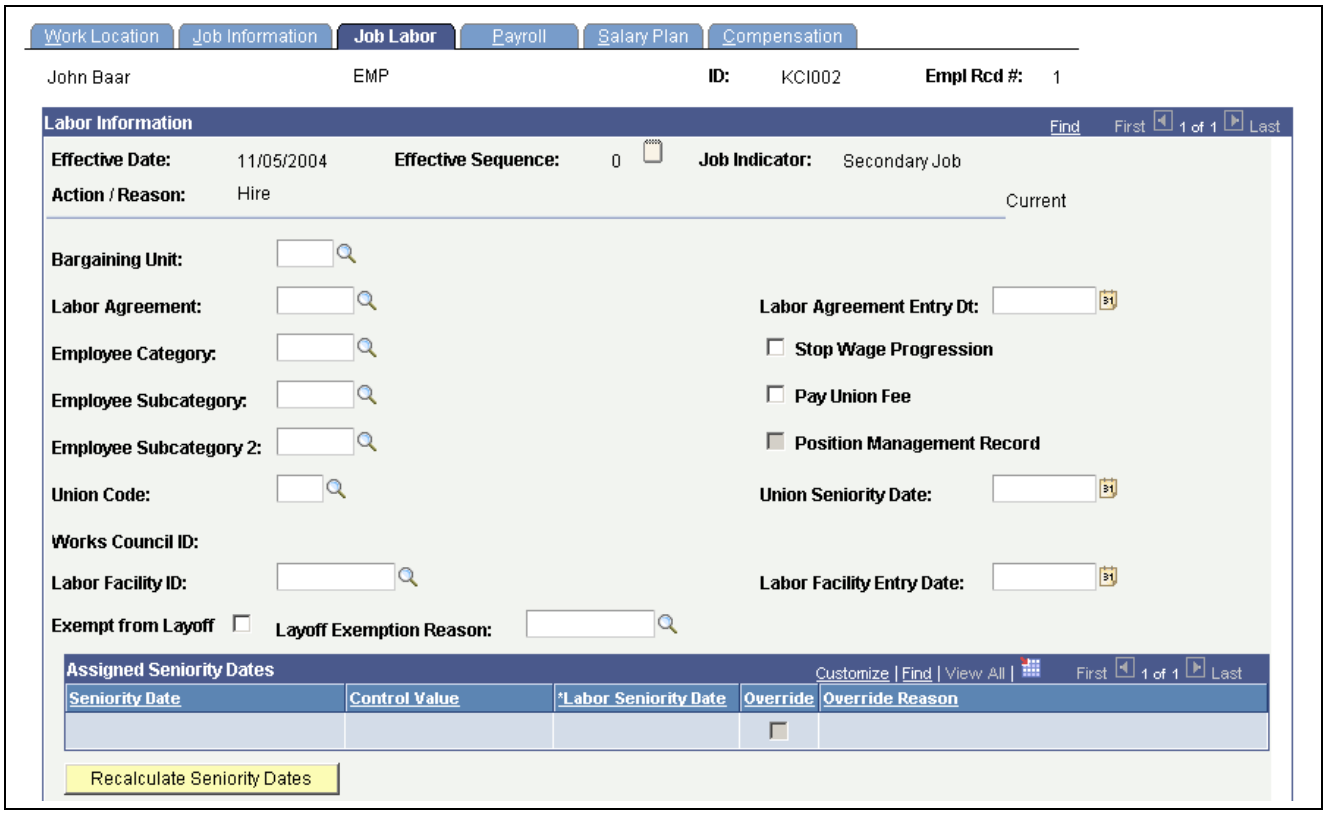
PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Working with Frequencies"

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up Jobs," Defining Job Function Codes

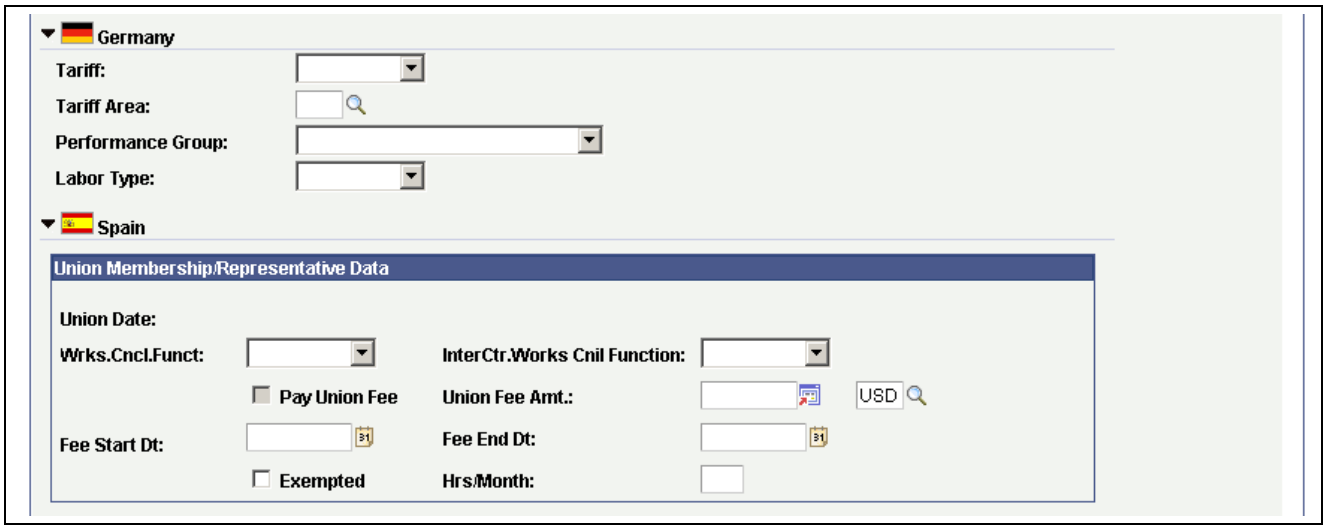
PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Benefits, "Setting Up Base Benefits Core Tables"

Entering National Labor Agreement Data

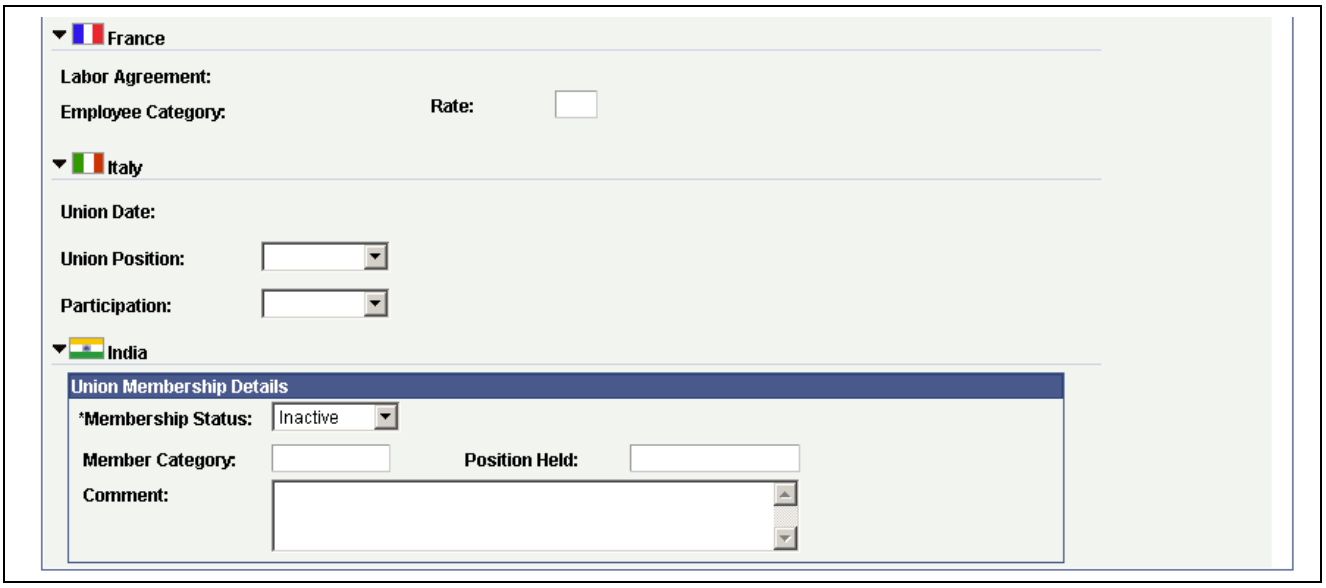
Access the Job Labor page.



Job Labor page (1 of 3)



Job Labor page (2 of 3)



Job Labor page (3 of 3)

Labor Agreement Specify which labor agreement applies to this worker.

Employee Category Specify the worker category to which the worker belongs under the labor agreement.

Employee Subcategory If the employee category that you select for this person contains subcategories, this field appears. Select the subcategory that applies to the worker.

Employee Subcategory 2 If the subcategory that you select for this person contains secondary subcategories, this field appears. Select the secondary subcategory that applies to this worker.

Union Code If the worker belongs to a union, enter the code.

Labor Facility ID Select the facility this worker belongs to.

Exempt From Layoff and **Layoff Exemption Reasons** Select if the worker is exempt from layoff and select a reason for the layoff exemption.

Labor Agreement Entry Dt (labor agreement entry date) If this worker is part of a national labor agreement, enter the date on which the worker enters the category or subcategory. Also, use this date to track the worker's seniority within the category.

Stop Wage Progression If the selected job code is associated with a wage progression salary plan, select to stop wage progression for this worker. The system will not accumulate hours towards a wage progression step for this worker. To resume wage progression, insert a new Job Data row and clear this check box.

Pay Union Fee Select if a union fee should be paid. The organization can define whether the worker or the employer should pay the fee. This field doesn't affect system processing.

Position Management Record The system selects this check box whenever the system inserts this data by updating the incumbent to reflect user-made changes to the Position Management component.

Union Seniority Date Enter the date on which the worker enters the union.

Labor Facility Entry Date Enter the date the worker began in the labor facility.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Labor Administration*, "Setting Up Labor Administration Data".

Assigned Seniority Dates

This grid lists the seniority dates associated with the selected labor agreement.

If the seniority date is set up to default from an existing value, the system will populate them. If the dates are set up to allow overrides, select the Override check box and enter the appropriate date.

If the seniority date is set up for manual entry, enter the appropriate date.

Click the Recalculate Seniority Dates button to recalculate seniority dates as needed.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Labor Administration*, "Setting Up Labor Administration Data," Defining Seniority Dates.

(DEU) Germany

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

Tariff Displays the tariff, which is a labor contract between the union and the employers' association. The default comes from the worker's location listed in the Location table. You can override this default.

Tariff Area Displays the tariff area, which is usually associated with geographical regions in Germany. The tariff area comes from the worker's location that is listed in the Location table. You can override this default.

Labor Type Specify if a worker is management or nonmanagement. Depending on where this worker belongs, different sets of human resources laws and rules apply. One rule concerns which internal labor committee monitors personnel actions.

Spokesmen Committee ID If you identify a worker as management in the Labor Type field, then the Spokesmen Committee is responsible for the worker, and this field appears. The Spokesmen Committee ID for this worker comes from the worker's location in the Location table.

(ESP) Spain

Union Date Enter the date on which the worker joins the union.

Wrk.Cncl.Funct (works council function) If the worker is a member of the works council for the organization, select which role. Values are: *none, Member, President,* and *Secretary.*

InterCtr.Works Cnil Function (intercenter works council function) Select the role that the worker has in the union group *(comite intercentros).* Values are: *Member 1, Member 2,* and *Member 3.*

Pay Union Fee and **Union Fee Amt** (union fee amount) Select if the worker pays a fee to the union and enter the amount and frequency of the fee.

Fee Start Dt (fee start date) and **Fee End Dt** (fee end date) — Enter the first and last dates on which the union fee should be paid.

Exempted — Select if this worker is exempt from a certain amount of work duty to handle works council duties.

Hrs/Month (hours each month) — This field appears if you select the Exempted check box. Enter the number of hours each month that the worker is exempted from regular work to handle works council business.

(FRA) France

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

(ITA) Italy

Use this region to enter the union membership details of workers who belong to a union.

Union Date — Enter the date on which the worker joins the union.

Union Position — Select the position that the worker holds in the union, if applicable.

Participation — Indicate the worker's level of participation in the union.

(IND) India

Membership Status — Select whether the worker's union membership status is active or inactive.

Member Category — Enter the member category. For example, *Staff, Officer,* or *Workman Category.*

Position Held — Enter the position that the worker holds. Some of the members of the union may hold office in the union as president, vice president, treasurer, or secretary; you enter this information here.

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

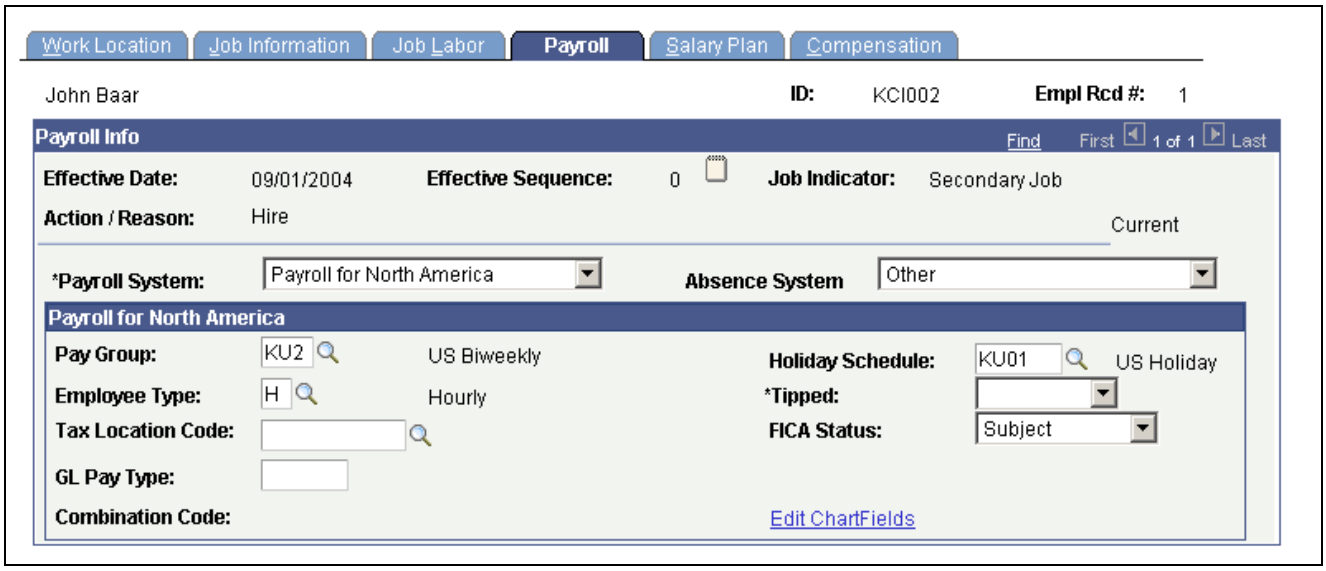
If you're managing a workforce in Canada or the U.S., you might want to review information about each union organization that the workers belong to and see a list of workers who are members. Use the Union Membership report (PER009) for this purpose. That report displays the worker ID, name, date hired,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

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions, "Managing Position Data"

Entering Payroll Processing Data

Access the Payroll page.



Payroll page

Payroll System Select the payroll system that is used to process this person's paycheck. The Payroll System field is available for entry only if you selected *Change of Pay* or any of the options that creates a new record on the Action/Reason field on the Work Location page.

Note. PeopleSoft Enterprise Payroll for North America does not process payroll for contingent workers. Customers using the E&G contract pay functionality, need to add contract workers using the Add Employment Instance component or select Employee on the Organizational Relationships page.

Payroll for North America

If you use Payroll for North America or Payroll Interface to process this person's paycheck, complete these fields:

Pay Group Select a pay group.

Holiday Schedule If you defined a default holiday schedule for the employee's location, the system displays it here. If you left the holiday schedule blank on the Location Profile page and entered a default on the Pay Group table, the system displays it here.

Employee Type Displays the employee type; the value depends on the pay group. The system completes the field with the default value from the Pay Group table. If an employee type doesn't exist for this pay group, establish one in the Pay Group table.

Tipped Indicate whether this worker receives tips. This field is available only if you define tips processing in the Company table. Values are:

Directly Tipped: Select for workers who normally receive tips directly from customers (for example, food servers).

Indirectly Tipped: Select for workers who do not normally receive tips directly from customers, but who might receive tips occasionally (for example, cooks and kitchen helpers).

Tax Location Code Select a tax location code.

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

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

GL Pay Type (general ledger pay type) (Optional) Indicate the general ledger account to which to post this person's pay. You can use this field as a way to charge a person's pay to a particular cost center.

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

Global Payroll

If you use PeopleSoft Enterprise Global Payroll to process this person's paycheck, complete these fields:

Pay Group Select a pay group.

The payroll system that you select on the Installation Table - Products page determines what value appears here. If *Global Payroll* is selected, the Global Payroll pay groups appear.

Note. The Global Payroll Pay Group field is different from the Payroll for North America Pay Group field. Pay group is very important in Global Payroll. Selecting *Global Payroll* as your payroll system on the Installation Table - Products page and selecting a pay group is what helps select a payee into the payroll process.

Use Pay Group Value When you select a pay group, the Use Pay Group Value check boxes next to the Eligibility Group, Exchange Rate Type, and Use Rate As Of fields are automatically selected.

Leave the check boxes selected to use the default values from the pay group definition. Clear the check boxes to override the default values.

Note. PeopleSoft Enterprise Global Payroll stores the values at the Job level *only* if you override them here. If you add a new effective-dated row to the job record or change the pay group assignment, the system reverts to the pay group defaults.

Eligibility Group This field is blank if the Use Pay Group Value check box is selected. If you want to override the pay group default, clear the check box and select an eligibility group which specifies earnings, deduction, and absence elements that a payee might be eligible to receive.

Exchange Rate Type This field is blank if the Use Pay Group Value check box is selected. If you want to override the pay group default, clear the check box and select the currency exchange rate type to use when performing currency conversions for the payee.

Use Rate As Of This field is blank if the Use Pay Group Value check box is selected. If you want to override the pay group default, clear the check box and select the pay calendar date to use when retrieving the effective-dated exchange rate information during currency conversions. The Use Rate As Of field works with the Exchange Rate Type field to determine which effective date is retrieved to get the appropriate exchange rate for the calendar period being processed. Exchange rate effective dates include: *Period Begin Date, Period End Date,* and *Payment Date.*

Holiday Schedule If you leave this field blank, Global Payroll processing uses the holiday schedule assigned to the payee's pay group, but does not enter that holiday schedule here.

(AUS) Australia

Balance Group No (balance group number) Enter a balance group number. Balance group numbers identify which Global Payroll accumulator the system should store tax balances in. Tax accumulators are keyed by ID, empl rcd#, pay entity, and balance group number. You use balance group numbers to combine or separate tax balances for multiple jobs (where different tax rates apply) or to separate balances in the case of termination and rehire. A balance group ID for each payment summary is required at the end of the year. There must be a person tax data record for each balance group ID that the person has.

(HKG) Hong Kong

Balance Group No (balance group number) Enter a balance group number. When workers are terminated and subsequently rehired in the same or similar position in the same tax year (using the Job Data component in Workforce Administration), there is a legislative reporting requirement in Hong Kong to keep the periods of employment and earnings balances separately. PeopleSoft Enterprise Global Payroll uses the balance group number to ensure that the relevant periods of employment and balances of a worker in a tax year are stored separately in terms of payroll data. This enables a worker to have multiple tax balances if the worker is terminated and rehired in the same financial year.

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

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

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

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

See Also

Chapter 9, "Managing Country-Specific Workforce Data," (USA) Determining U.S. Residency Status for Foreign Nationals, page 282

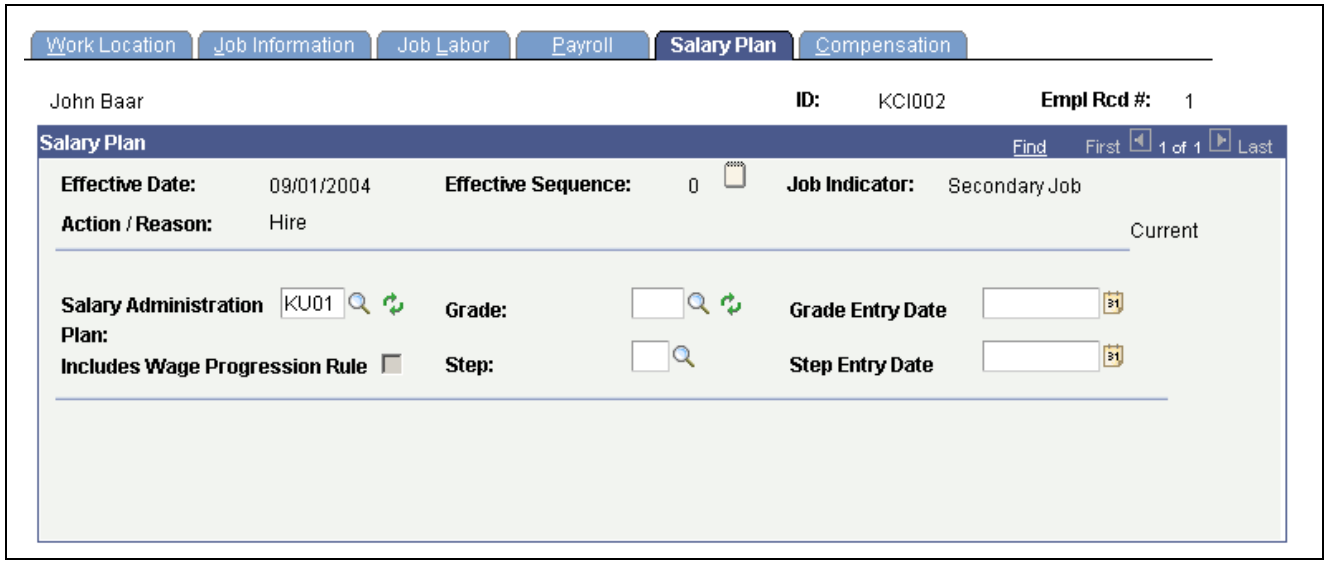
PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Compensation, "Getting Started with Administer Compensation," Administer Compensation Overview

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," Setting Up Holiday Schedules

Entering Salary Plan Information

Access the Salary Plan page.



Salary Plan page

Salary Administration Plan Displays the salary administration plan code. If you associate salary administration plans with locations, the value that is in this field comes from the Location table based on setID matching. Otherwise, the salary plan comes from the Job Code table.

If you change the location after hire (and a salary plan is defined in the Location table), then the system does not automatically display a default value for this salary plan. Instead, the system checks if the existing grade and step are still valid for this new salary plan. The existing grade and step must also be defined for the new salary plan. If the grade and step are defined for this new salary plan, then the system displays by default from the Location table the value for the new salary plan. If the grade and step are not defined for this new salary plan, then the system does not change to the salary plan from the Location table.

To use auto-calculated premium processing for this person, select a plan that has Auto Calculated Premium selected and an absorbing or nonabsorbing (or both) premium rate code assigned in the Salary Plan table. The system displays auto-calculated-premium-related fields on the Compensation page only if you select an auto-calculated premium plan here.

Note. If this worker has a labor agreement and job code with a wage progression salary plan, the system populates this field by default and makes it unavailable for entry.

Grade If you associate a grade with the person's job code, the system displays the default value from the Job Code table.

Note. If this worker has a labor agreement and job code with a wage progression salary plan, the system populates this field by default and makes it unavailable for entry.

Grade Entry Date Displays the date on which the person first joined this grade. You can override this value.

Includes Wage Progression Rule The system selects this check box if the salary plan includes wage progression.

Step If you associate a step with the person's job code, the system displays the default value from the Job Code table.

Step Entry Date Displays the date on which the person first joined this step. You can override this value.

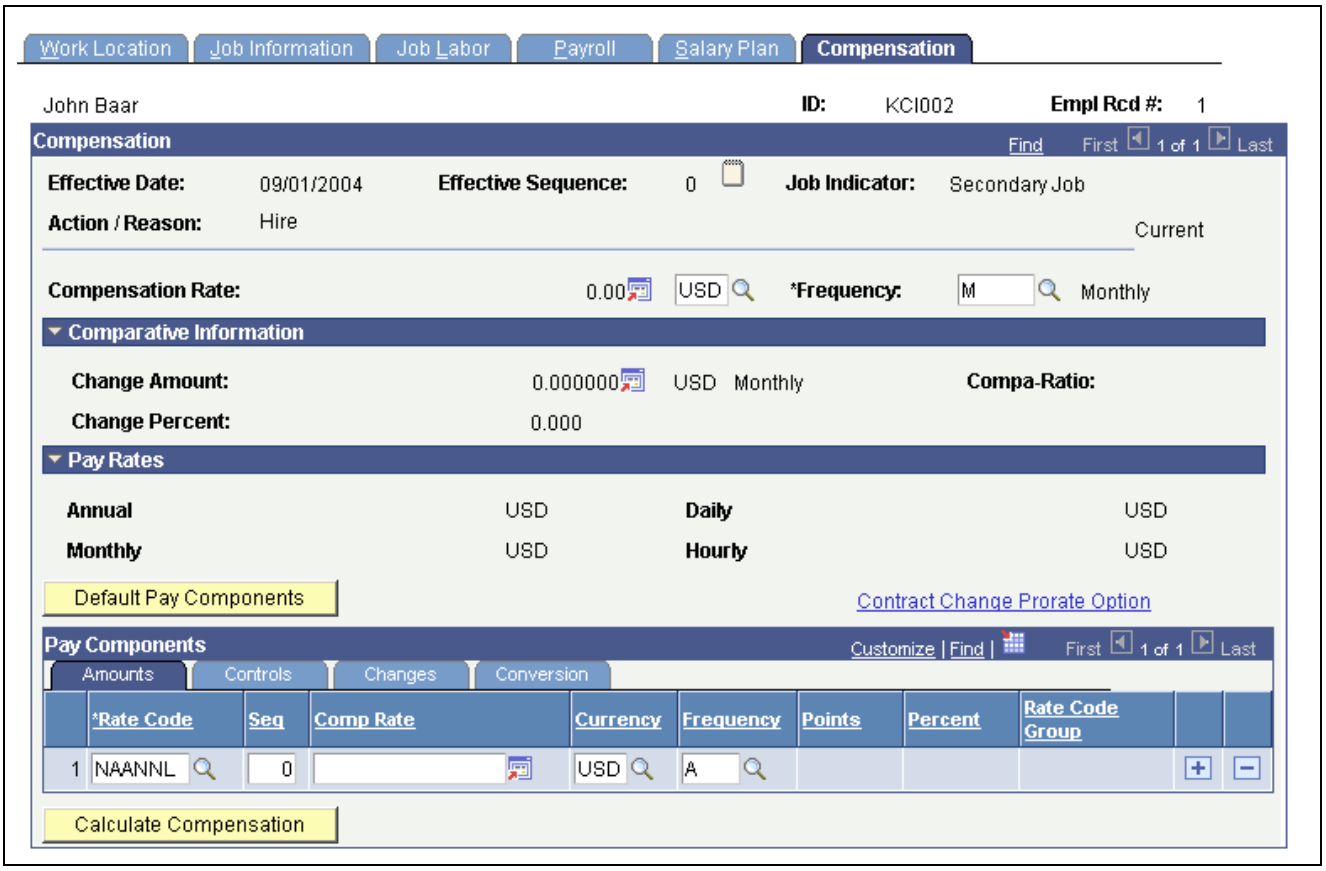
Note. The system verifies the combinations of salary administration plans and grades that you select.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Working with System Data Regulation in HRMS"

Entering Compensation Information

Access the Compensation page.



Compensation page

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

Note. The PeopleSoft Enterprise Payroll for North America Calculate Pay process (PSPPYRUN) uses this value, not the individual base pay components that are in the Pay Components section of the page. The only compensation rates that the system uses from the Pay Components section are the nonbase pay rates.

Frequency Select a compensation frequency.

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

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

AutoCalculated Premium

Target Compensation Rate Enter the compensation rate for the person if the person is being compensated at a rate that exceeds the default salary. Values are:

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

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

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

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

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

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

This field is available only if the person's salary plan (on the Salary Plan page) has auto-calculated premium enabled.

Don't Absorb Change Select to instruct the system to leave absorbable rate codes unchanged if there is a change in the default salary amount.

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

Comparative Information

Change Amount Displays the change in the amount of compensation for the rate code.

Change Percent Displays the percent of change in the compensation for the rate code.

Compa-Ratio (comparison ratio) Displays the percent-through-range calculation, based on the salary plan and grade and the currency that the organization uses.

Job Ratio Displays the percent-through-range calculation, based on the midpoint salary of the person's job code.

The job ratio is available only if the person's job code has job ratio information (midpoint salary, currency, and frequency) defined.

Pay Rates

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

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Working with Frequencies," Setting Country-Specific Frequency Defaults.

Default Pay Components Click to:

- Carry out rate code defaults (excluding seniority pay) based on the current values of the designated job fields.
- Replace manual updates and old default values with the current default values.
- Recalculate the compensation package of affected persons, including the compensation rate, currency, frequency, apply FTE, percent (including current rate code groups), salary points, automatically calculated premium, and so on.
- Recalculate compensation-related fields, such as annual amounts or compa-ratio, on the Job Data record.

If you don't click this button after updating relevant job data fields, the system issues a warning when you attempt to save the new record. If you click OK, the system displays this page, where you can click this button and make any required changes. If you do not click this button, the component package doesn't appear by default until the next time that the default component logic is triggered (either when you click the button or through a batch update process).

Contract Change Proration Option Click to make changes to the person's contract proration options.

Select one of the following options to prorate the earnings change over the remainder of the contract:

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

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

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

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

Calculate Compensation Click to have the system recalculate the person's compensation without carrying out any rate code defaults or replacing any default values. You cannot modify the person's pay components without recalculating the compensation.

Pay Components - Amounts

Select the Amounts tab.

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

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

Comp Rate (compensation rate) Displays the compensation rate for the pay component.

Frequency Displays the compensation frequency for the pay component.

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

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

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

Pay Components - Changes

Select the Changes tab.

Manually Updated This flag indicates whether the pay component is manually updated or the pay component contains only values that appear by default.

Change Amount Displays the overall change amount in this pay component rate.

Change Points Displays the overall change amount (in points) for this pay component. This field is visible only if Salary Points is selected on the Installation Table page.

Change Percent Displays the overall change amount for this pay component. This field isn't available for rate codes that have a rate code type of percent or points.

Pay Components - Conversion

Select the Conversion tab.

Source Indicates how the pay component gets into the pay components grid. *Manual* indicates that the pay component is added manually. *Salary Step* indicates that the pay component is retrieved by default from the salary step. *Job Code* indicates that the pay component is retrieved by default from the job code, and so on.

Default without Override Indicates whether you can change the default values of the pay component or the values for this rate code are default values and display-only.

Apply FTE (apply full-time equivalent) Select if you want the value that is associated with the rate code to be multiplied by the FTE factor for annualization and deannualization. FTE is the percentage of full-time that the worker should normally work in the corresponding job. This field isn't available for rate codes of type percent.

Converted Comp Rate (converted compensation rate) Displays the converted compensation rate for this pay component. The system converts all base pay components to the currency and compensation frequency that you specify.

See Also

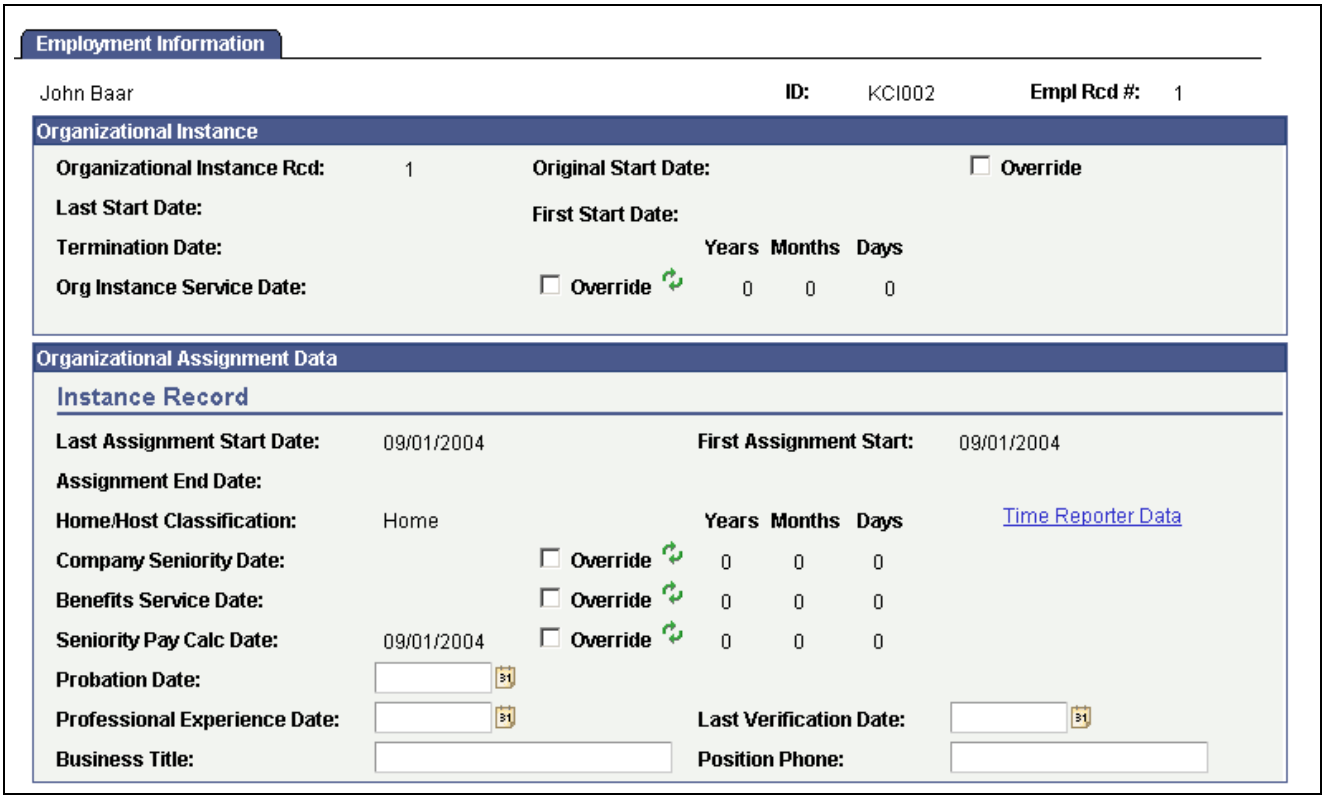
PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "(E&G) Administering Contract Pay"

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Compensation, "Getting Started with Administer Compensation"

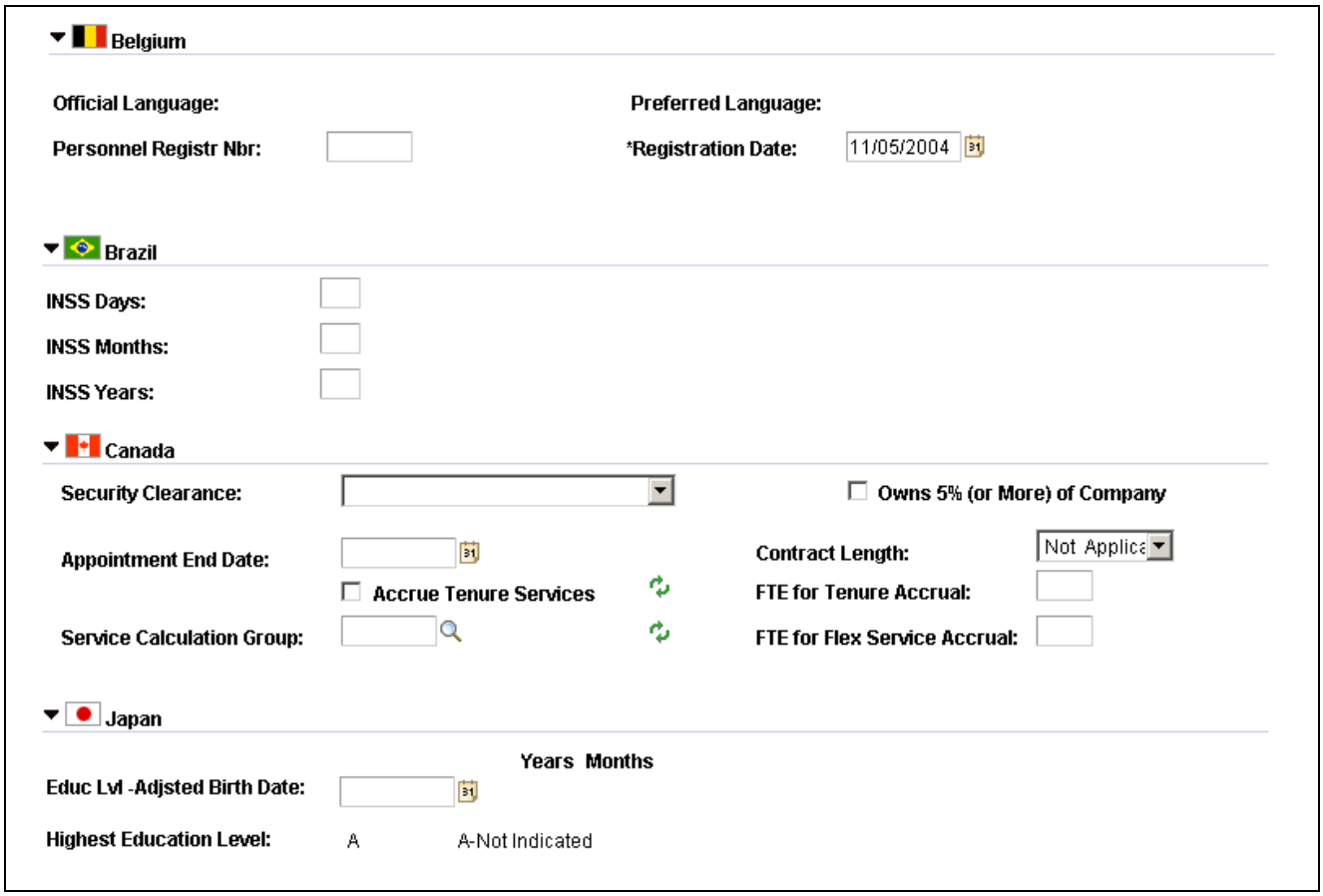
PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Working with Frequencies," Job Data Pay Rate Frequencies

Entering Optional Employment-Related Data

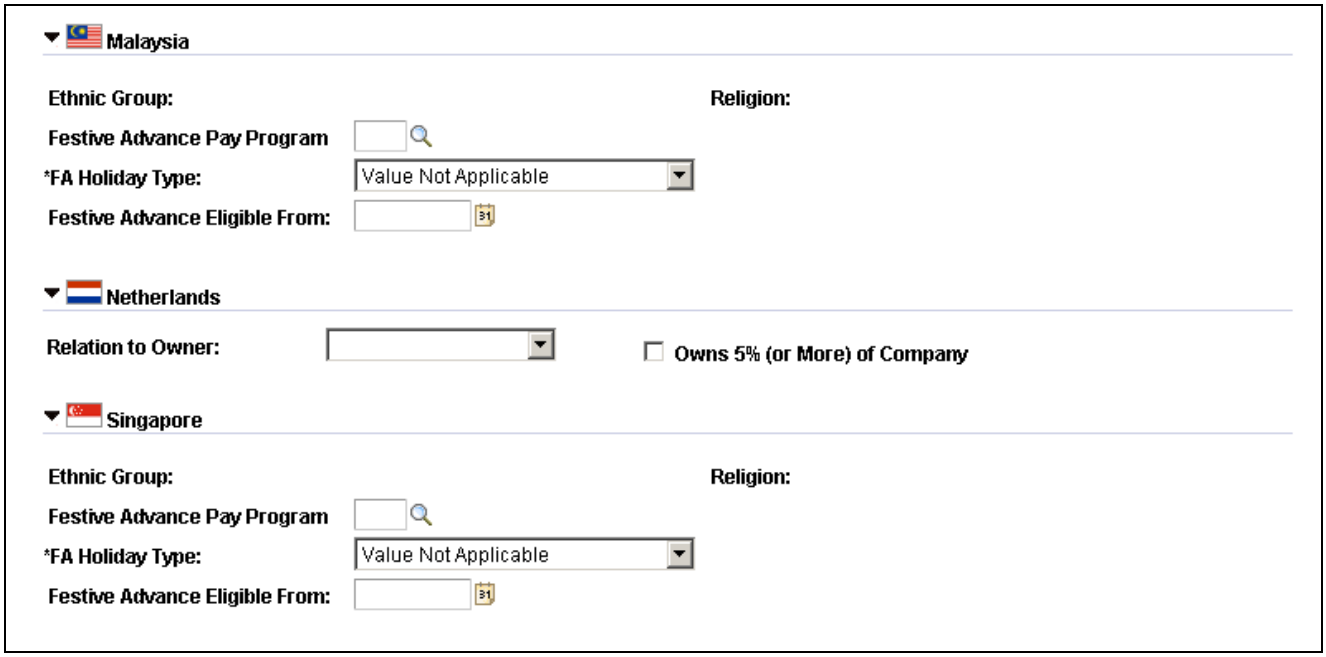
Access the Employment Information page.



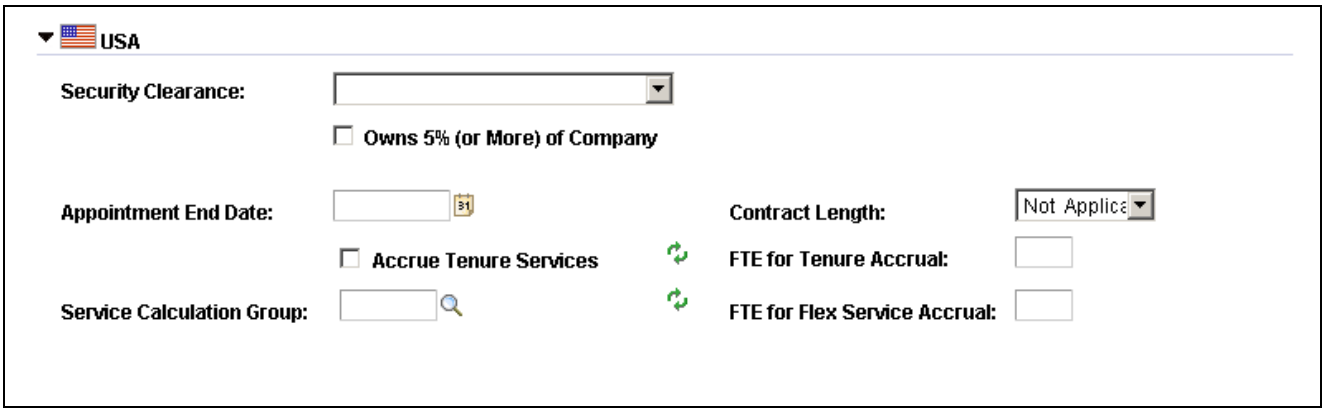
Employment Information page (1 of 4)



Employment Information page (2 of 4)



Employment Information page (3 of 4)



Employment Information page (4 of 4)

This information isn't effective-dated, so the data that you enter and review here tells you about the worker's current employment information for this employment record number.

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

After you save the component, the system sets the Company Seniority Date , Service Date, and Seniority Pay Calc Date (Seniority Pay Calculation Date) fields on this page to the effective date that you enter on the Work Location page. You can override these fields after saving the component. The system calculates and displays the worker's service months and days based on the information that you enter in the Company Seniority date, Service Date, and Seniority Pay Calc Datefields.

Organizational Instance

Displays the current values from the Job Data component for this organizational instance.

Organizational Instance Record — When the organizational instance record is different from the employee record number (Rcd#), the rest of the fields that are in this group box are display only.

For example, an employee has Empl Rcd # 0. This is also the Organizational Instance Record for this employment and any additional assignments related to this employment. If the employee is assigned to an additional assignment, the Empl Rcd # is 1. However, the Organizational Instance Record is 0 for this additional assignment.

Original Start Date — Displays the original start date for this organization instance.

Last Start Date — Displays the most recent start date for this organization instance. This date is different from the first start date if this organization instance has been inactive and then reactivated.

First Start Date — Displays the first start date for this organization instance.

Termination Date — Displays the worker's termination date, if applicable.

Org Instance Service Date (organizational instance service date) — Displays the organizational instance service date.

Provider ID — For contingent workers, displays the ID of the service provider.

Organizational Assignment Data

Last Assignment Start Date Displays the start date of the last assignment under this organizational instance.

First Assignment Start Displays the start date of the first assignment under this organizational instance.

Assignment End Date Displays the end date of the last assignment, if applicable.

Home/Host Classification For workers who are on assignments, this field specifies whether the current job is at the worker's home location or the assignment location. For a new hire, select *Home*.

Time Reporter Data Click to review the PeopleSoft Time and Labor data for this worker. If you don't use PeopleSoft Enterprise Time and Labor, this link is unavailable.

Company Seniority Date Based on the date that you enter here, the system calculates the number of years, months, and days of seniority for a worker.

Benefits Service Date Based on the date that you enter here, the system calculates the total years, months, and days of service for a worker, including any credit for military leave or the total amount of time that the worker works for multiple companies in the organization. This date is used to calculate benefits eligibility.

The system uses the original start date as the default value.

Seniority Pay Calc Date (seniority pay calculation date) Enter the date that the system should use to calculate seniority-based pay.

The system uses the original start date as the default value.

Probation Date Enter the date on which the worker is placed on probation.

Professional Experience Date Displays the earliest date on which the worker started working in a job that required skills that are directly related to the worker's current position.

Last Verification Date Displays the latest date on which the worker verified his or her personal data in the system.

Business Title Enter the worker's official title, which might be different from the job title. If you drive part or all of the system by position, the system enters the default title for the position number that you assign to the worker on the Work Location page.

Work Phone or **Position Phone** Track the worker's primary work phone number. You can also update this field by using the Manage Positions pages.

If you drive part or all of the system by position, the system enters the default phone number for the position number that you assign to the worker on the Work Location page.

(CAN) Statistics Canada Academic Teaching Employment Table

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

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

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

Survey Report Flag — Displays the report flag value, as specified on the Job Code Table - Job Code Profile page. If the value is *N/A,* this record isn't reported in academic teaching surveys. You can override this default value.

Duties — Displays the duties value, as specified on the Job Code Table - Job Code Profile page. You can override this default.

Principal Subject — Select the principal subject that is taught by the worker.

Teaching Load — Enter the worker's teaching load during the academic teaching employment. For example, if the worker is teaching three full courses, enter *3.0.* If the worker is teaching one full course and one-third of another, enter *1.33.*

FTTE (full-time teaching equivalency) — Enter the ratio of the teaching load to the full-time teaching equivalency. For example, if teaching four courses constitutes full-time and the worker is teaching three courses, enter *.75.*

Collapse as FT (collapse as full-time) — Select if the employment can be collapsed into the reportable full-time job for the purpose of consolidating salary amounts from jobs that make up a full-time job.

Use this field only if the worker:

- Has two or more part-time jobs in different departments that function as a single full-time job.
- Receives an administrative stipend under another employee record number that doesn't accrue benefits but counts toward the worker's full-time salary.

Don't collapse reportable part-time jobs into a reportable full-time job. (The system doesn't report on the part-time job.) Instead, if you use this field, set up a separate employee record for part-time jobs.

(MYS and SGP) Malaysia and Singapore

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

Ethnic Group and **Religion** — Displays the values that you enter on the Personal Data - Regional page.

Festive Advance Pay Program — Displays the value from the Job Code Table - Job Code Profile page. You can change this default.

FA Holiday Type (festive advance holiday type) — Select a festive advance type. Values are: *Chinese New Year, Christmas, Deepavali, Hari Raya,* and *N/A.*

The default value is the festive holiday that is appropriate to the ethnicity or religion that you enter for this person on the Personal Data - Regional page. You can change this selection. If a person chooses not to receive a festive advance, select *N/A.*

Festive Advance Eligible From

Displays the festive advance eligible from date. If the firm has a probation period that must be served before a worker is entitled to a festive advance, the probation period must be monitored.

When you set the probation period in the Festive Advance Pay Program, you set the number of days or months. The system adds this information to the worker's hire date to determine the festive advance eligible from date; this date appears as the default on the FA Employee Details page.

When you process the festive advances, the system checks the festive advance eligible from date against the date on which to pay the advance. If the festive advance eligible from date is not yet passed, the worker is not paid a festive advance.

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

(JPN) Japan

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

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

Education Level Age Years Months

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

(BEL) Belgium

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

Personnel Registr Nbr (personnel registration number)

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

(NLD) Netherlands

Relation to Owner

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

(BRA) Brazil

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

Enter the number of days, months, and years that the worker makes social security contributions before being hired by the company.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Track Global Assignments, "Tracking Assignments," Entering Basic Assignment Data

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up Local Country Functionality," Setting Up Education Level Ages

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Festive Advance, "Managing Festive Advance"

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Benefits, "Setting Up Base Benefits Core Tables"

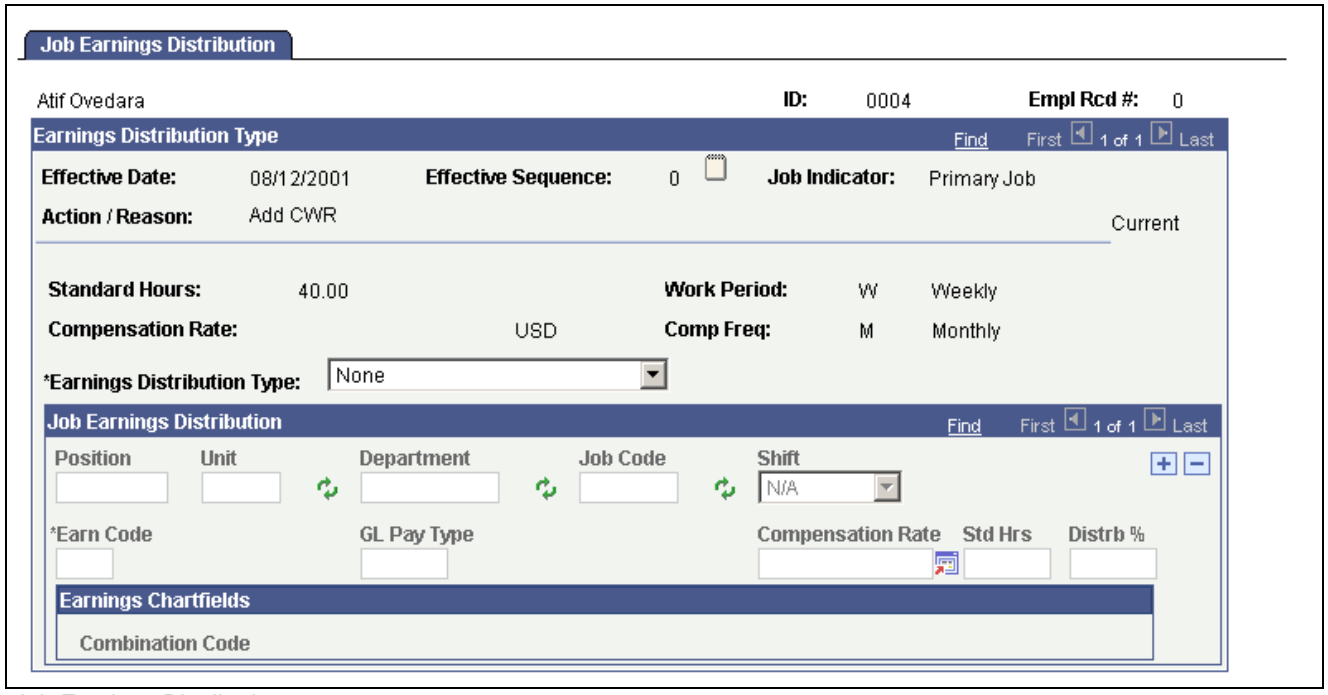
PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions, "Setting Up Positions"

PeopleSoft Enterprise Time and Labor 8.9 PeopleBook, "Setting Up Basic Tables"

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up Local Country Functionality," Setting Up the Education Level Age Table

Distributing Job Earnings

Access the Job Earnings Distribution page.



Job Earnings Distribution page

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

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

  Payroll for North America uses the department, job code, account, shift, position number, and general ledger type that you enter on the Work Information and Payroll pages to calculate pay earnings records.
- The system hides this page when all job rows in the component use PeopleSoft Enterprise Global Payroll.

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

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

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

Earnings Distribution Type Select an earnings distribution type. Values are:

- *None:* Select to indicate that you don't allocate earnings for this person. The system calculates and charges person compensation according to the information that is listed in the Job Data component. If you select this option, leave the other fields on this page blank.

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

  See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up Jobs," Understanding Pay Groups.

- *By Amount:* Available only for salaried workers. This enables you to apportion the worker's total earnings for a period on the basis of an amount.

  Select to instruct the system to total the amounts that are in the distribution lines and check the total against the total in the Compensation Rate field on the Job Data - Compensation page. The total earnings distribution amount must equal the compensation rate amount. If the amounts are not the same, the system generates an error when you try to save the record. You will need to resolve the discrepancy to save the Job Data record.

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

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

  The amounts that are in the distribution lines total 4,544, so the system checks that amount in the Compensation Rate field on the worker's job record equals this total.

- *By Hours:* Available only for hourly or exception hourly workers. Select to instruct the system to total the hours that are in the distribution lines and update the total in the Standard Hours field on the Job Data - Job Information page. The Standard Hours field that appears at the top of this page also changes.

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

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

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

- *By Percent:* Available to all workers. The sum of the percentages that are in the distribution lines must equal 100.

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

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

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

Paying Workers on Disability

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

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

When you enter an action of short-term disability with pay or long-term disability with pay, the system changes the worker's status to leave with pay.

To send 100 percent of the worker's pay to the disability plan earnings code, access the Job Data - Job Earnings Distribution page, select the By Percent option, enter the appropriate disability earnings code, and enter a percent of *100*.

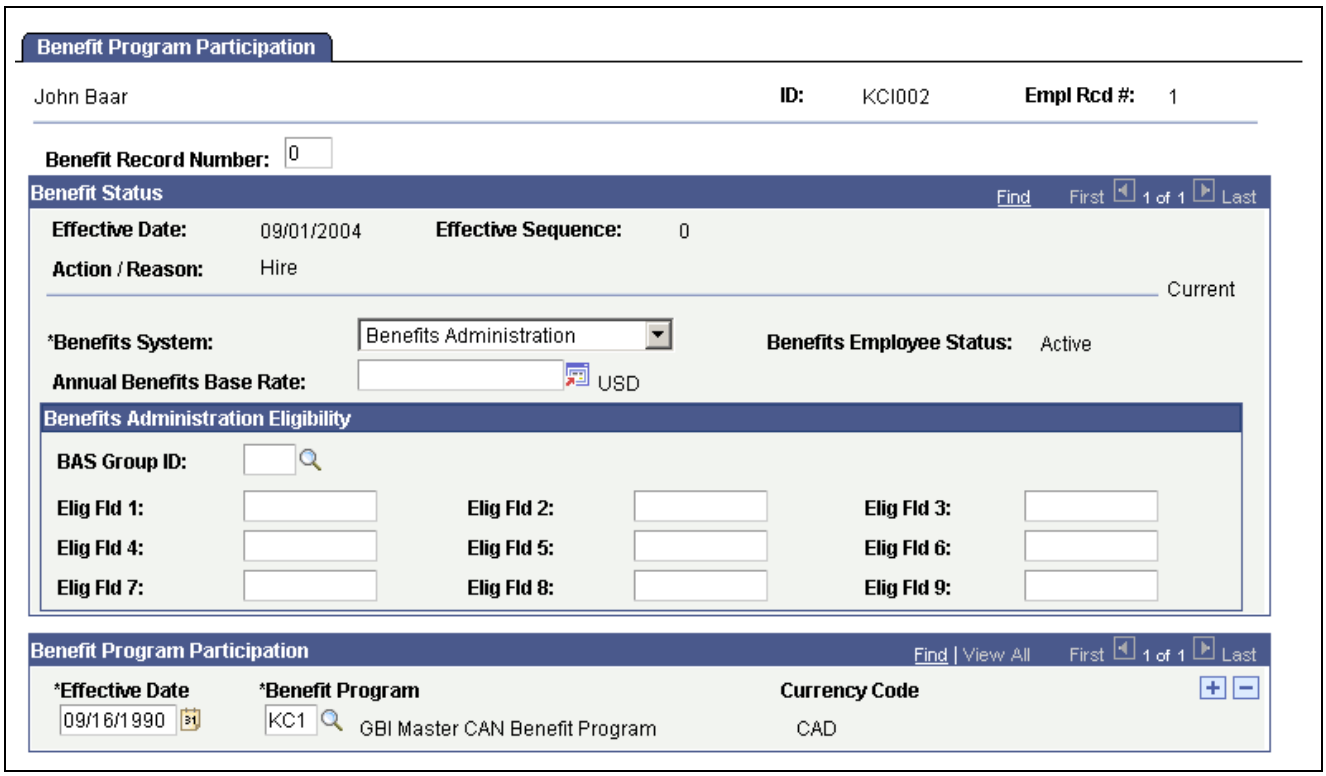
Note. When you put a worker on disability, don't forget to check additional pay records and make any necessary changes.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Defining Earnings Codes and Earnings Programs"

Specifying Benefit Program Enrollment

Access the Benefit Program Participation page.



Benefit Program Participation page

Benefit Record Number Displays the benefit record number, which is an identifier that links two or more jobs for benefits purposes. The system sets the value to *0*. You can override this value to attach this job to a different benefit record number. The system clears the benefits program data and repopulates it with values that are attached to the benefit record number that you enter.

Benefits System Select the appropriate benefits system. Select *Not Managed in PeopleSoft* (benefits managed by a system other than PeopleSoft) to filter out persons who have insufficient employment and job information to support benefit enrollment.

Benefits Administration Eligibility

Elig Field 1-9 (eligibility configuration fields 1−9) Enter values to further filter persons' eligibility for a specific benefit. These are client-definable fields.

Benefit Program Participation

Benefit Program Displays the code that corresponds with the benefits program for the person's pay group, which you specify in the Pay Group table. You can override this value.

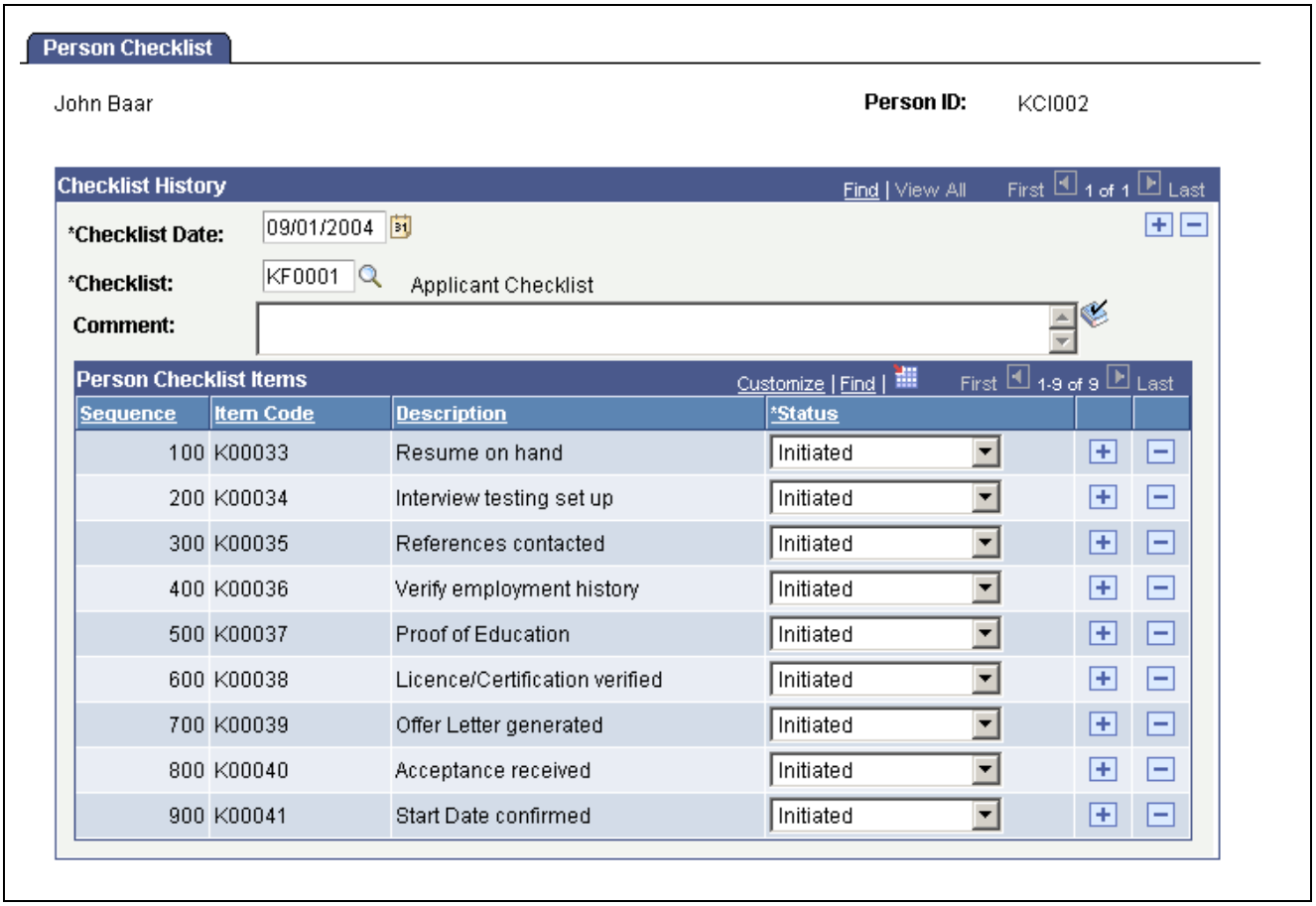
Currency Code Displays the code of the currency that is specified for the benefit program in the Benefit Program table.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Benefits, "Setting Up Base Benefits Core Tables"

Creating a Checklist

Access the Person Checklist page.



Person Checklist page

You can have more than one checklist active for a person at any one time.

Checklist Select the appropriate checklist. The system populates the list with the associated items.

Person Checklist Items

The system populates this table when you select a checklist. You can add additional items.

Checklist Item Code Displays the checklist item if you selected a checklist. To add items without a checklist, select the item.

Status The system displays a status of *Initiated* for all new checklist items. Update the status from the following options as necessary:

- *Completed*

- *Notified*
- *Received*

Link ID Displays a link to the component used to complete the listed item.

For example, the link ID for the item Emergency Contact is Emergency Contact, which links to the Emergency Contact component (EMERGENCY_CONTACT).

Adding Additional Assignments

This section provides an overview of the process of adding additional assignments, lists prerequisites, and discusses how to:

- Work with multiple benefit record numbers.
- Enter additional assignments.

Understanding the Process of Adding Additional Jobs

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

If you set up PeopleSoft Enterprise HRMS security to allow workers to have multiple jobs, you can add an additional assignment to a worker's employment record. Use the Assign Additional Assignment component (ADD_PER_ORG_ASGN) in Administer Workforce to add new jobs for workers who already have one or more jobs. From the Add New Assignment page (PER_ORG_INST_ASGN), access the Concurrent Job Data component (JOB_DATA_CONCUR) to enter data for the new job. The component consists of the same pages as the Job Data component. If all jobs are within the same company and meet certain criteria, you can combine earnings from multiple jobs on one paycheck if you are using PeopleSoft Enterprise Payroll for North America.

Note. (USF) Use the Concurrent Hire USF component (EE_CONC_HIRE) instead of the Assign Additional Job component.

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

Update job data for concurrent jobs on the Job Data component.

See Chapter 5, "Increasing the Workforce," Adding Organizational Instances for Employees, Contingent Workers, and POIs, page 83.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Understanding Organizational Relationships, Employment Record Numbers, and Multiple Jobs"

Chapter 7, "Entering Additional Data in Human Resources Records," Entering Temporary Assignments, page 194

Working with Multiple Benefit Record Numbers

In addition to an employment record number, you assign each concurrent job a benefit record number that tracks the worker's participation in benefit programs. Jobs that share the same benefit record number also share the same benefit programs.

The following tables show different ways to assign benefit record numbers in a situation where a worker has three concurrent jobs:

Apply Job 1's Benefits to All Jobs

Job	Employment Record Number	Benefit Record Number
Job 1	0	0
Job 2	1	0
Job 3	2	0

Apply Job 3's Benefits to All Jobs

Job	Employment Record Number	Benefit Record Number
Job 1	0	0
Job 2	1	0
Job 3	2	0

Apply Separate Benefits to Each Job

Job	Employment Record Number	Benefit Record Number
Job 1	0	0
Job 2	1	1
Job 3	2	2

Apply Job 1's Benefits to Jobs 1 and 2 and Separate Benefits to Job 3

Job	Employment Record Number	Benefit Record Number
Job 1	0	0
Job 2	1	0
Job 3	2	2

When you add a concurrent job, the system sets the default benefit record number on the Benefit Program Participation page to *0.* If you change the benefit record number, the system clears and repopulates the Benefit Program field with the data attached to the benefit record number that you enter. If the benefit record number that you enter doesn't match any existing benefit record number for the worker, the system populates the Effective Date field with the worker's hire date and the Benefits Program field with the default benefit program for the worker's pay group.

Note. Use the Benefit Program Participation page to maintain benefits program information.

Prerequisites

Before you can add multiple jobs for the workforce, you must update the user security so that users have access to the menu options that they need.

When a worker has more than one job, you might want to designate one job as primary and the others as secondary. The primary job designation is used for government reporting.

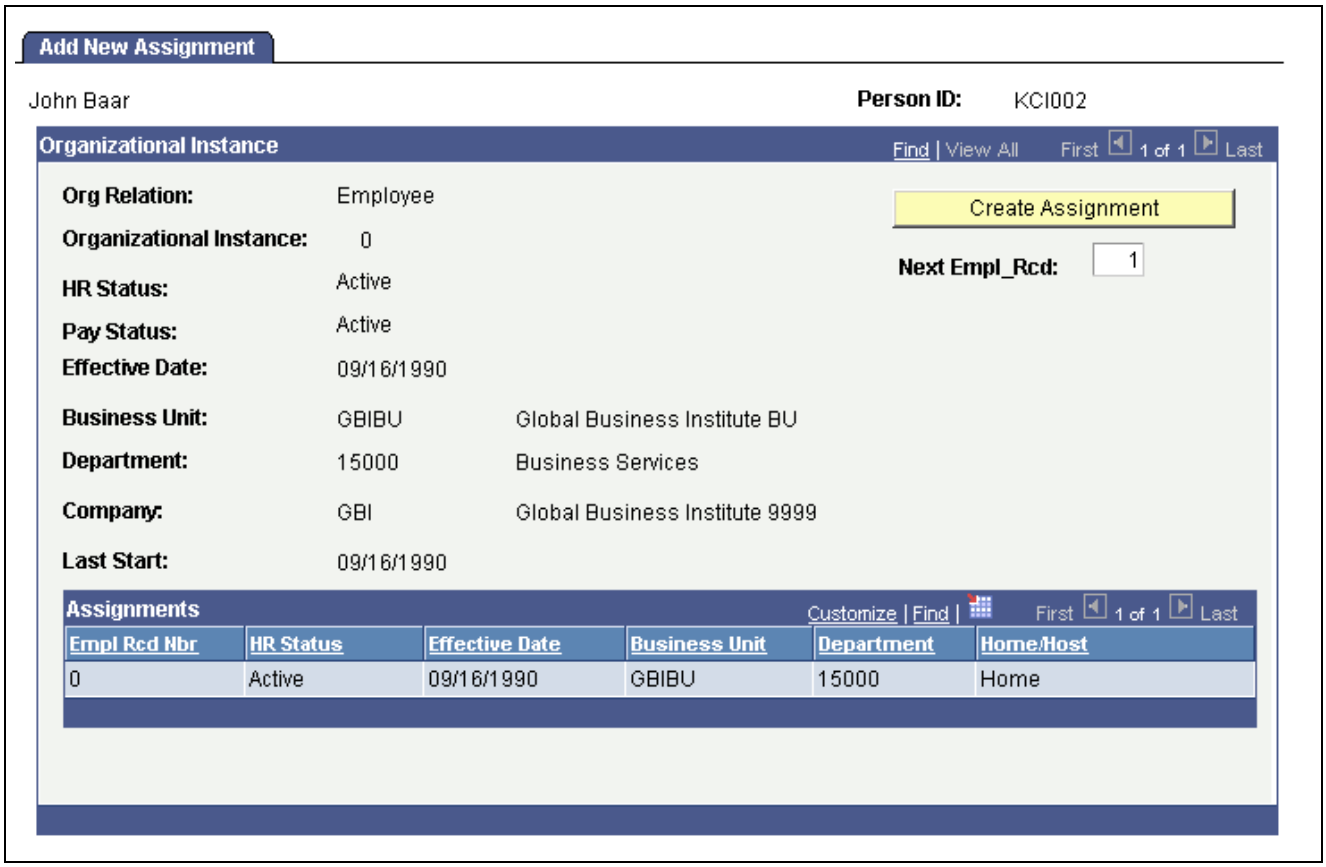
Pages Used to Add Concurrent Jobs

Page Name	Object Name	Navigation	Usage
Add New Assignment	PER_ORG_INST_ASGN	Workforce Administration, Job Information, Add Additional Assignment	Review a worker's assignments and access the Concurrent Job Data component to create new assignments.
Work Location	JOB_DATA1	Workforce Administration, Job Information, Add Additional Assignment Click the Create Assignment button.	Enter position and location information for a person's concurrent job, including the regulatory region, company, department, and location.
Job Information	JOB_DATA_JOBCODE	Workforce Administration, Job Information, Add Additional Assignment Click the Create Assignment button.	Enter information about a person's concurrent job, including status, employee class, shift, or standard hours.

Page Name	Object Name	Navigation	Usage
Job Labor	JOB_LABOR	Workforce Administration, Job Information, Add Additional Assignment Click the Create Assignment button.	Enter National Labor agreement data if the employee or contingent worker belongs to a National Labor agreement.
Payroll	JOB_DATA2	Workforce Administration, Job Information, Add Additional Assignment Click the Create Assignment button.	Enter payroll processing data. The payroll system and pay group information that you enter here affects component compensation processing on the Compensation page.
Salary Plan	JOB_DATA_SALPLAN	Workforce Administration, Job Information, Add Additional Assignment Click the Create Assignment button.	Enter information about a person's salary plan.
Compensation	JOB_DATA3	Workforce Administration, Job Information, Add Additional Assignment Click the Create Assignment button.	Enter compensation information.
Employment Information	EMPLOYMENT_DTA1	Workforce Administration, Job Information, Add Additional Assignment Click the Create Assignment button.	Enter optional data, such as an employee's business title.
Job Earnings Distribution	JOB_DATA_ERNDIST	Workforce Administration, Job Information, Add Additional Assignment Click the Create Assignment button.	Distribute a person's compensation for one job among different departments, job codes, accounts, shifts, position numbers, or general ledger pay types. If the person's pay is regularly charged to more than one cost center, designate how much to allocate to each cost center.
Benefit Program Participation	JOB_DATA_BENPRG	Workforce Administration, Job Information, Add Additional Assignment Click the Create Assignment button.	Specify the benefit program in which a person is enrolled for benefits in PeopleSoft Enterprise Human Resources or PeopleSoft Enterprise Benefits Administration.

Entering Additional Assignments

Access the Add New Assignment page.



Add New Assignment page

Org Relation (organizational relationship) Displays the person's organizational relationship.

Organizational Instance Displays the instance number for this relationship.

Next Empl_Rec (next employee record) Enter the employment record number for the next assignment. This number should be unique from all other employment record numbers currently held by this person.

Assignments Lists the assignments under this organizational instance by employment record number.

Adding Job Applicants

To add applicants, use the Manage Hires (HR_MANAGE_HIRES) component.

The Add Employment Instance and Add Contingent Worker components are the most common components that you use to increase your workforce, but they are not the only components. You can also use the Manage Hires component, which is designed especially for hiring applicants. The Manage Hire page displays a list of applicants that have gone through the recruiting process and are ready to be hired. When you add the applicant, much of the applicant's information is transferred to the Personal Data page.

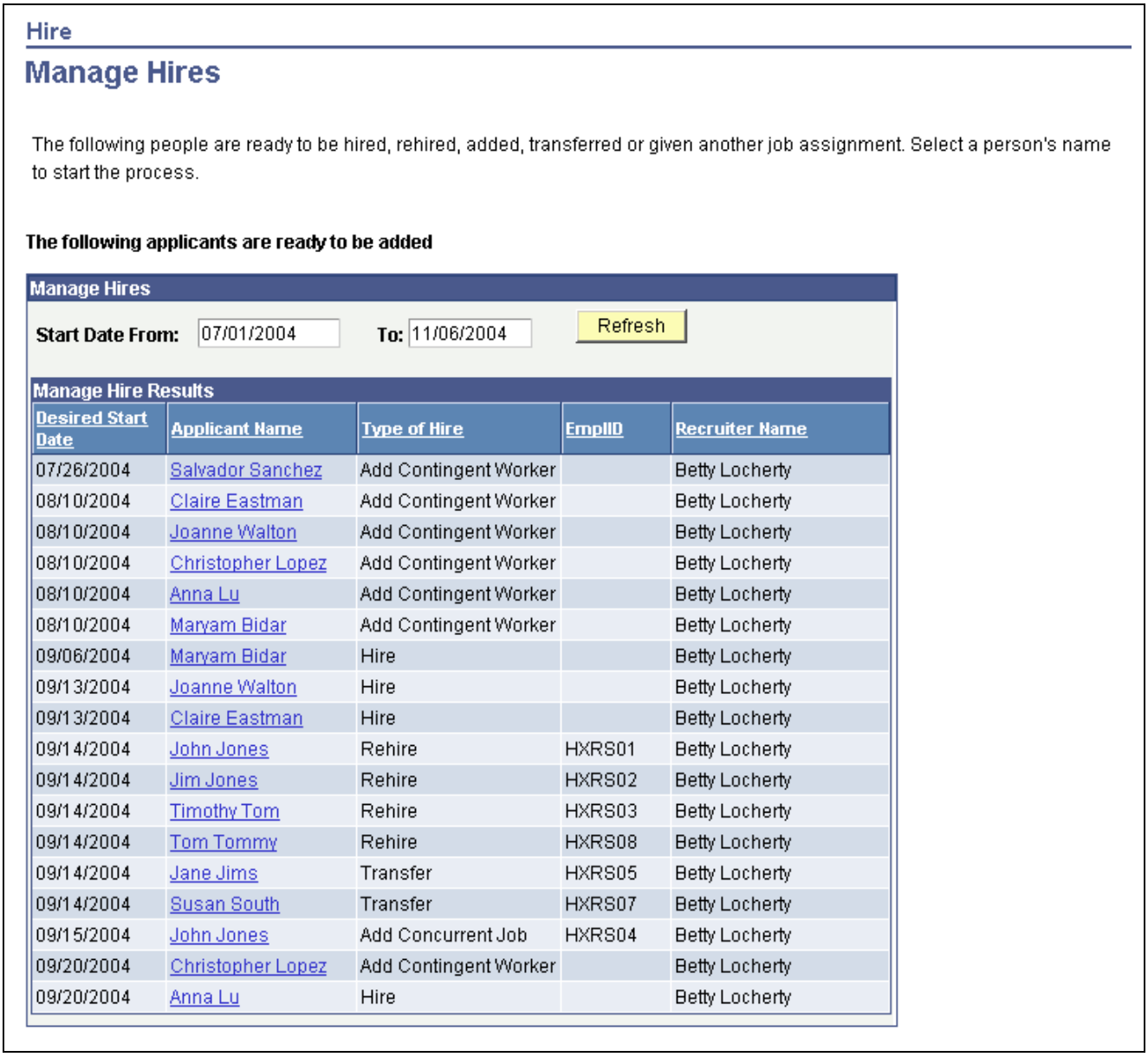
Selecting an applicant name on the Manage Hires page opens the Manage Hire Details page.

Page Used to Add Job Applicants

Page Name	Object Name	Navigation	Usage
Manage Hires	HR_MANAGE_HIRES	Workforce Administration, Personal Information, Organizational Relationships, Manage Hires	Displays a list of applicants that have gone through the recruiting process.

Managing Hires

Access the Manage Hires page.



Desired Start Date	Applicant Name	Type of Hire	EmplID	Recruiter Name
07/26/2004	Salvador Sanchez	Add Contingent Worker		Betty Locherty
08/10/2004	Claire Eastman	Add Contingent Worker		Betty Locherty
08/10/2004	Joanne Walton	Add Contingent Worker		Betty Locherty
08/10/2004	Christopher Lopez	Add Contingent Worker		Betty Locherty
08/10/2004	Anna Lu	Add Contingent Worker		Betty Locherty
08/10/2004	Maryam Bidar	Add Contingent Worker		Betty Locherty
09/06/2004	Maryam Bidar	Hire		Betty Locherty
09/13/2004	Joanne Walton	Hire		Betty Locherty
09/13/2004	Claire Eastman	Hire		Betty Locherty
09/14/2004	John Jones	Rehire	HXRS01	Betty Locherty
09/14/2004	Jim Jones	Rehire	HXRS02	Betty Locherty
09/14/2004	Timothy Tom	Rehire	HXRS03	Betty Locherty
09/14/2004	Tom Tommy	Rehire	HXRS08	Betty Locherty
09/14/2004	Jane Jims	Transfer	HXRS05	Betty Locherty
09/14/2004	Susan South	Transfer	HXRS07	Betty Locherty
09/15/2004	John Jones	Add Concurrent Job	HXRS04	Betty Locherty
09/20/2004	Christopher Lopez	Add Contingent Worker		Betty Locherty
09/20/2004	Anna Lu	Hire		Betty Locherty

Manage Hires page

Start Date From: and **To:** Enter the range of desired start dates to retrieve a list of applicants to hire.

Refresh Click to update the list of applicants in the Manage Hires Results region based on the range of dates entered in the Start Date From and To fields.

Applicant Name Select an applicant name to review job details and pull this person's personal data information from PeopleSoft Enterprise Recruiting Solutions.

Reviewing Organizational Relationships

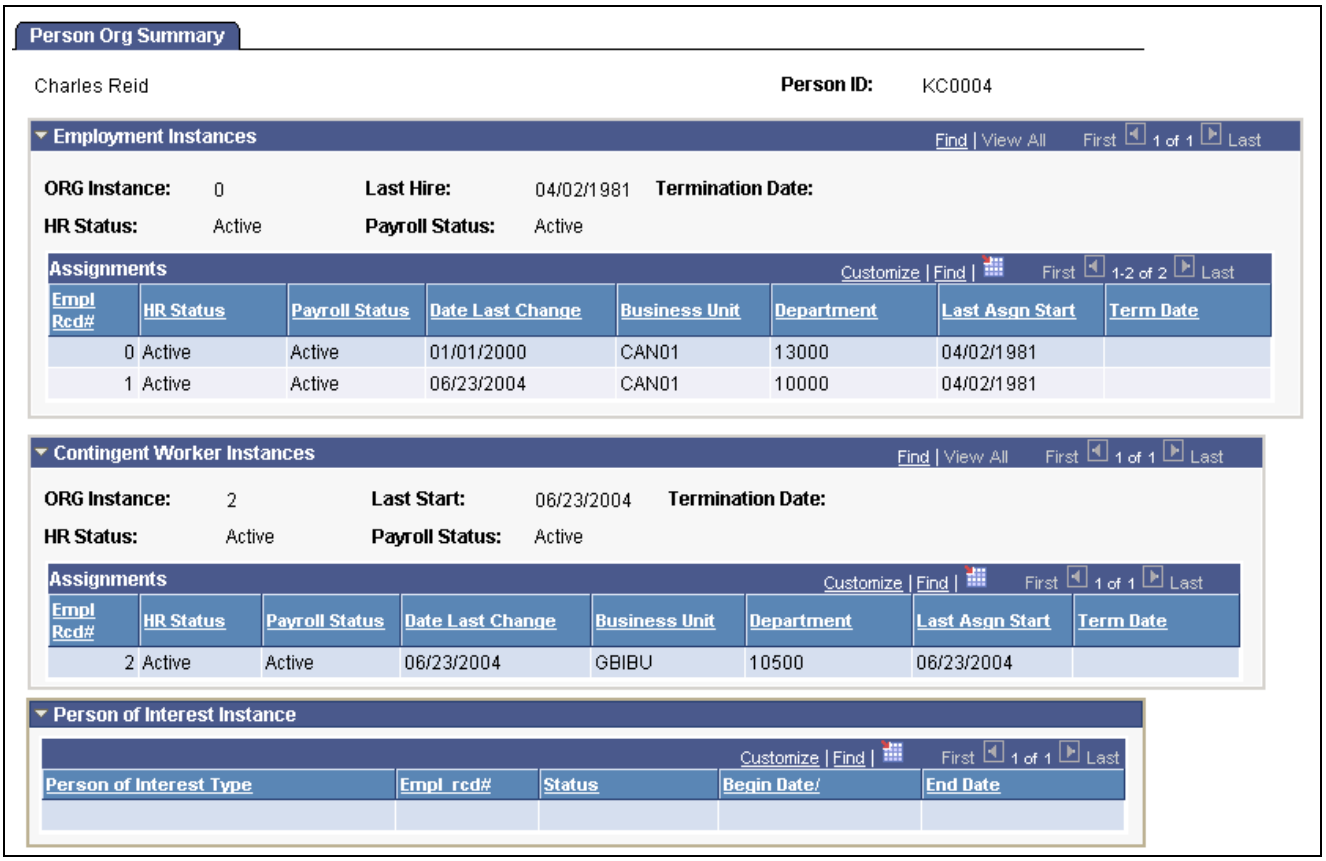
This section discusses how to view a person's organizational relationships.

Page Used to View a Person's Organizational Relationships

Page Name	Object Name	Navigation	Usage
Person Org Summary	PERSON_SUMMARY	Workforce Administration, Personal Information, Organizational Relationships, Person Organizational Summary, Person Org, Summary	Review a summary of a person's organizational relationships.

Viewing a Person's Organizational Relationships

Access the Person Org Summary page.



Person Org Summary page

(BRA) Running Brazil Employment Reports

This section provides overviews of the CAGED report and employee registration and discusses how to:

- Generate CAGED reports.
- Generate employee registry reports.

Understanding the CAGED Report

The *Cadastro Geral de Empregados e Desempregados* – CAGED (General Register of Employed and Unemployed Individuals) is a permanent register of employee hirings and dismissals. Every establishment that has had any type of turnover (hiring, dismissing, or transferring employees who have employment contracts ruled by the Consolidated Labor Laws) is required to report that turnover to the Ministry of Labor and Employment.

The CAGED report generates a file containing the monthly turnover of employees by establishment.

Understanding Employee Registration

Employee registration provides evidence of length of service and length of social security contribution and proves the relationship between employee and employer. This information affects social security pensions. Companies must record their employees' data in books or cards.

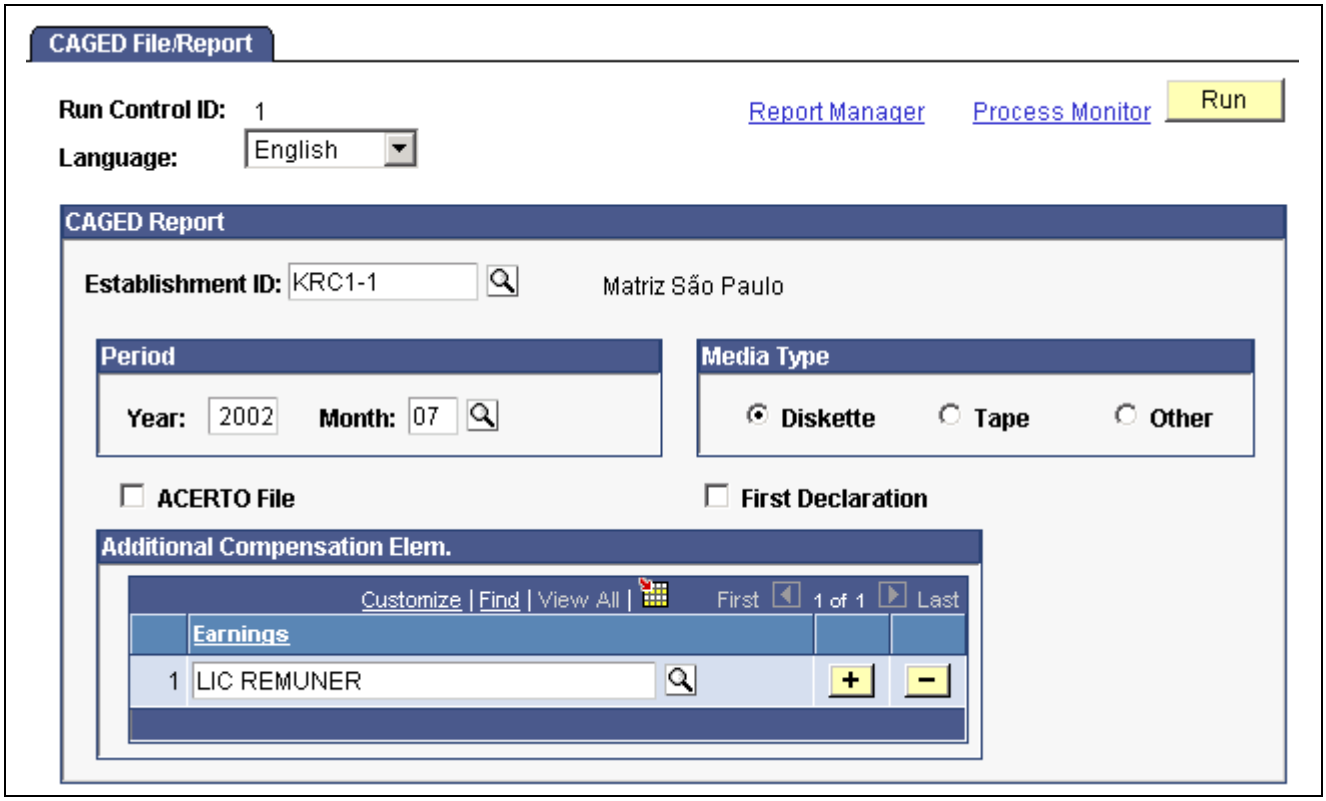
The employee registry report generates a flat file containing information about the employee's employment data (hire date, retirement date) and contributions. Keep the flat file as a record.

Pages Used to Run Brazil Employment Reports

Page Name	Object Name	Navigation	Usage
CAGED File/Report	CAGED_RC_BRA	Workforce Monitoring, Meet Regulatory Rqmts BRA, CAGED File/Report BRA	Generate CAGED reports.
Employee Registry	EMPL_REG_RC_BRA	Workforce Monitoring, Meet Regulatory Rqmts BRA, Employee Registry Report BRA	Generate employee registry reports.

Generating CAGED Reports

Access the CAGED File/Report page.



CAGED File/Report page

Media Type Indicate how you are sending the file to CAGED. Values are: *Diskette* (floppy disk), *Tape* (magnetic tape or cartridge), or *Other*.

ACERTO File Select to generate an ACERTO (rightness) file. You generate an ACERTO file to send corrections to a previously sent file; it contains the same information as CAGED.

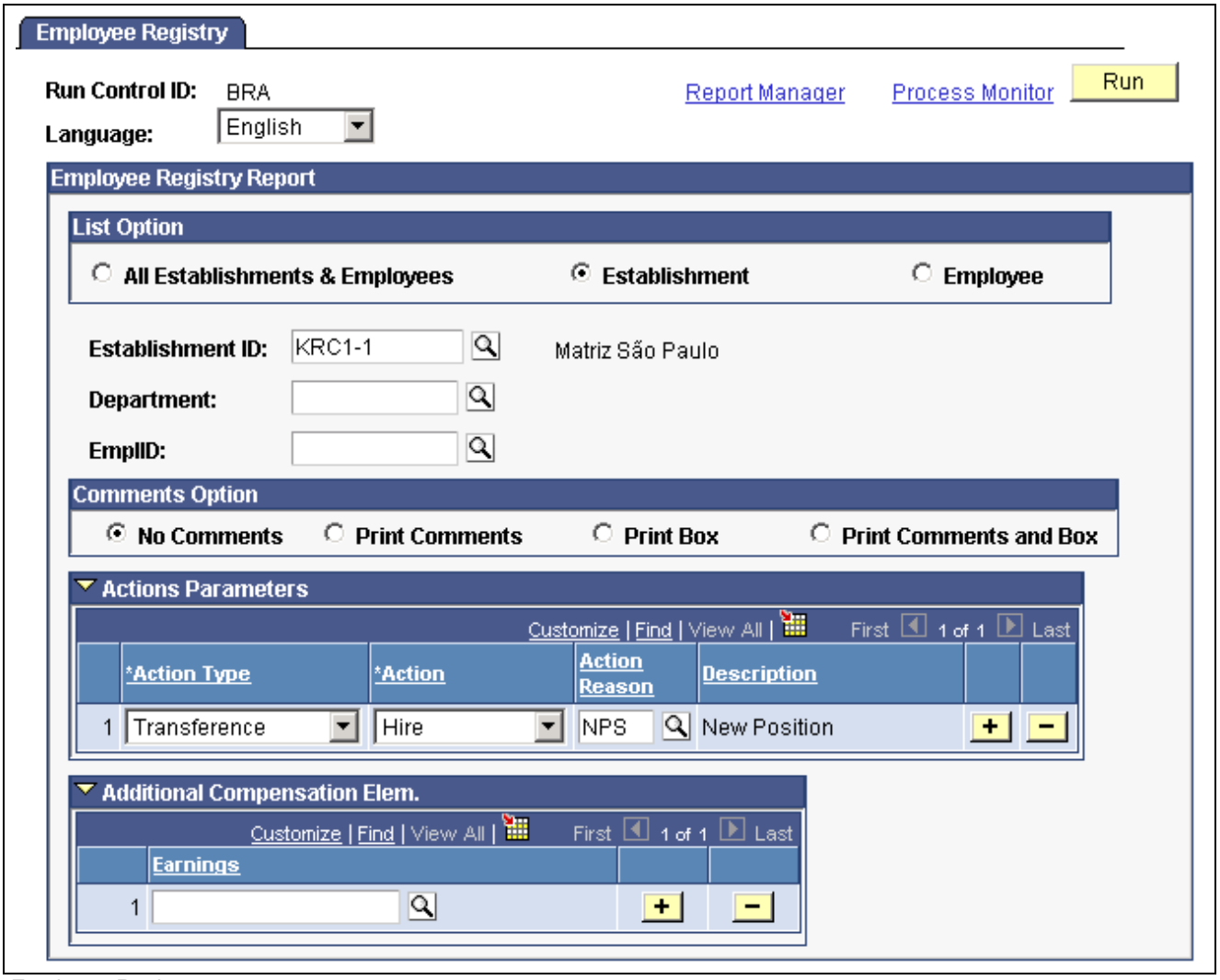
First Declaration Select to indicate that this is the first statement that the establishment is sending to CAGED.

Additional Compensation Elem. (additional compensation elements) If you use PeopleSoft Enterprise Global Payroll, enter earning components other than salary to report to CAGED.

Run the BRCGED01 process to generate the CAGED report.

Generating Employee Registry Reports

Access the Employee Registry page.



Employee Registry page

List Option Select whether you want the report to include all employees and establishments or to include only a particular establishment or employee.

If you select the *Establishment* option, the Establishment ID, Department, and EmplID fields appear.

If you select the *Employee* option, the EmplID field appears.

Establishment ID, Department, and **EmplID** Use these fields to restrict the number of employees for whom you generate an employee registry report.

Action	Enter an action reason to generate employee registry reports only for employees with the specified action reason.
Additional Compensation Elem. (additional compensation elements)	If you use PeopleSoft Enterprise Global Payroll, you can include payroll information in this report. Enter earning components other than salary to include in this report.

Run the BREREG01 process to generate the Employee Registry report.

(CAN) Running the Canadian Hire List Report

This section lists the page used to run the Canadian Hire List report.

Page Used to Run the Canadian Hire List Report

Page Name	Object Name	Navigation	Usage
Hire List	RUNCTL_FROMTHRU	Workforce Administration, Increase Workforce, Hire Report CAN	Run the CAN Hire List report (PER100CN). This produces a hire list that provides information on social insurance numbers, effective dates, and badge or payroll numbers that are within the date range that is provided.

CHAPTER 6

(USF) Hiring Employees

This chapter lists common elements and discusses how to:

- Use the personnel action request (PAR) process to hire employees.
- Enter education information.
- Assign employees to positions.
- Hire job applicants.
- Add concurrent jobs.
- Print appointment affidavits and preliminary employment data forms.

Common Elements Used in This Chapter

Transaction#/Sequence

Set by default to *1/1*—the correct numbers for new employees. Your agency can use these numbers to track both the individual transactions for this employee and the multiple administrative actions that occur on the same day.

This field controls the order in which actions are processed internally and the order in which they are output across interfaces. After you save a request, the system automatically increments it by one for each new action effective on the same day. If human resources personnel perform a correction of the original hire request, the correction's assigned value is *1/2* (*1* is the transaction number for this particular action for this employee on this day and *2* is the sequence number for any correction of this action for this employee on this day).

NOA Code (nature of action code)

The reasons for a hire action request.

PAR Status (personnel action reason status)

References the status of this request within the PAR request/approval process. On the Data Control page, this field is set by default to *Processed by HR,* which is the correct choice for new employees. The value that remains after you leave this page is the default value on other pages within the component.

OK

Click to close this page.

Using the PAR Process to Hire Employees

This section provides an overview of how to hire employees using the PAR process and discusses how to:

- Enter information for the hiring process.
- Enter PAR remarks.
- Enter job tracking information.
- Enter employee personal information.
- Enter birth information.
- Enter address information.
- Enter veteran information.
- Enter marital information.
- Enter education details.
- Enter job information.
- Specify benefit programs.
- Enter retirement data.
- Track information for employees on assignment.
- Enter position information.
- Enter employee compensation information.
- Enter additional compensation information.
- View pay rate and compensation calculations.
- View job earnings distributions.
- Enter current and historical employment information.
- Enter expiration dates.
- Enter appointment limits.
- Enter additional employment information.
- Track nonpay status information.
- Enter employee security and financial disclosure information.
- View Component Interface Exceptions.

Understanding the PAR Process to Hire Employees

The PAR process depends on seven common pages that store specific information required for the PAR hiring process and contain links to supplemental pages that provide further details for the information entered on the primary page. To accommodate the different steps in the PAR process, there are eleven components that contain these seven common pages. The object names of the seven common pages are the same in all of the components. The following table lists the five components:

Component	Navigation Path	When to Use
Hire Employee	Workforce Administration, Job Information, Hire Employee USF	Initially hiring employees.

Component	Navigation Path	When to Use
Concurrent Hire	Workforce Administration, Job Information, Concurrent Hire USF	See Chapter 6, "(USF) Hiring Employees," Adding Concurrent Jobs, page 177.
Supervisor Request	Workforce Administration, Job Information, Supervisor Request USF	See Chapter 15, "(USF) Administering Personnel Action Requests," Tracking and Routing a PAR Through Reviews and Completion, page 395.
Cancel Personnel Action	Workforce Administration, Job Information, Cancel Personnel Action USF	See Chapter 15, "(USF) Administering Personnel Action Requests," Canceling or Correcting a Personnel Action Request, page 401.
Correct Personnel Action	Workforce Administration, Job Information, Correct Personnel Action USF	See Chapter 15, "(USF) Administering Personnel Action Requests," Canceling or Correcting a Personnel Action Request, page 401.

To request a new hire, use the Hire Employee component. Enter personal information, employment information, job data, job earnings distribution information, and benefit program choices. You must enter this information before you can perform any other human resource tasks in PeopleSoft Enterprise Human Resources. Because many of the fields on these pages are required, enter information in all the pages *before* saving your entries.

See Also

Chapter 15, "(USF) Administering Personnel Action Requests," Understanding the Administering PAR System, page 393

Pages Used to Hire Employees

Page Name	Object Name	Navigation	Usage
Data Control	GVT_JOB0	Workforce Administration, Job Information, Hire Employee USF, Data Control	Enter information for the hiring process, such as the NOA code, approving authorities, PAR remarks, and tracking information.
PAR Remarks	GVT_PAR_PROCESS_RK	Click PAR Remarks on the Data Control page.	Enter or look up comments specific to this position or employee situation.
Job Tracking Info	GVT_EE_CNTRL_SEC	Click Tracking Data on the Data Control page.	View or enter job-tracking information.

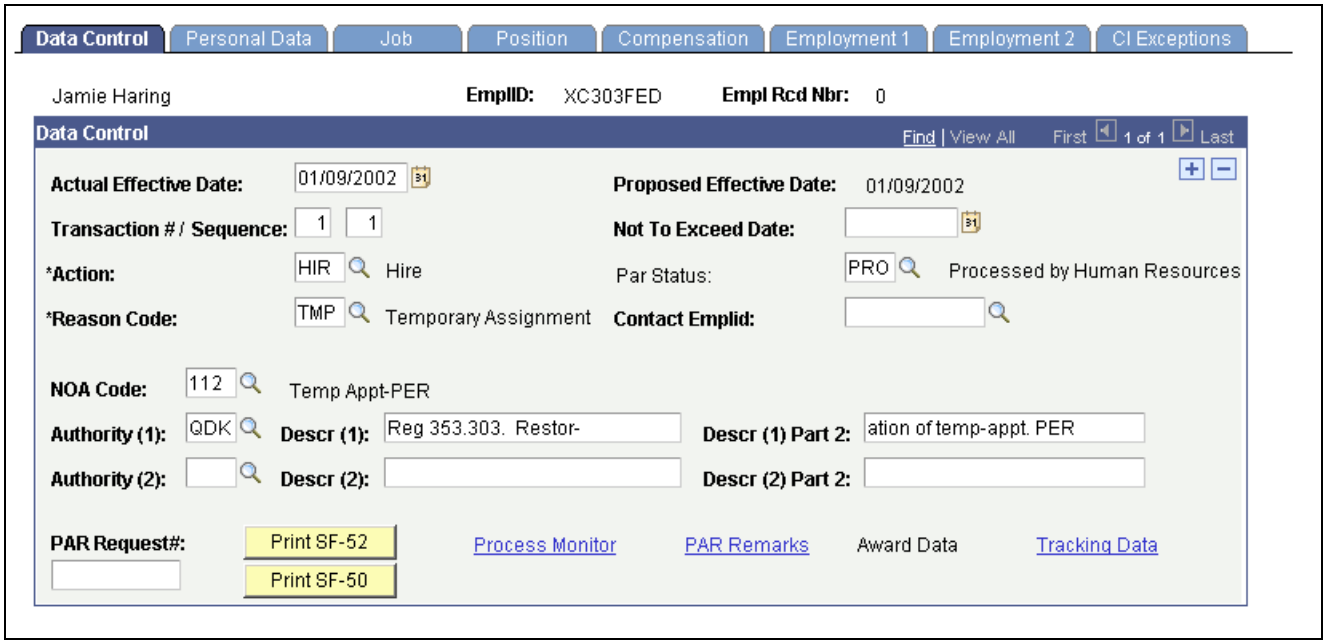
Page Name	Object Name	Navigation	Usage
Personal Data	GVT_PERS_DATA1	Workforce Administration, Job Information, Hire Employee USF, Personal Data	Enter the employee's personal information, such as name, address, birthplace, education, military service, citizenship, veteran, marital status, race or origin, and handicap.
Addl Birth Info (additional birth information)	GVT_BRTHINF_SEC	Click Additional Birth Info on the Personal Data page.	Enter birth information.
Address Information	GVT_ADDRINF_SEC	Click Mailing Address on the Personal Data page.	Enter contact (home) and mailing address information.
Personal Phone Numbers	GVT_PERS_PH_SEC	Click Personal Phone Numbers on the Personal Data page.	Enter employee phone, fax, cellular, and other numbers.
Veterans Info	GVT_VETINF_SEC	Click Veterans Info on the Personal Data page.	Enter veteran information.
Marital Status	GVT_MARITAL_SEC	Click Marital Info on the Personal Data page.	Enter marital information.
Education Details	GVT_EDUCINF_SEC	Click Education Details on the Personal Data page.	Enter education details.
Job	GVT_JOB1	Workforce Administration, Job Information, Hire Employee USF, Job	Enter job information, including the employee's position, agency, and department.
Benefits/FEHB Data (Benefits / Federal Employees Health Benefits Data)	GVT_BENDATA_SEC	Click Benefits/FEHB Data on the Job page.	Specify benefit programs in which the employee is enrolled in PeopleSoft Enterprise Human Resources or in PeopleSoft Enterprise Benefits Administration.
FEGLI/Retirement/FICA (Federal Employees Group Life Insurance / Retirement / Federal Insurance Contributions Act)	GVT_BENDATA1_SEC	Click FEGLI/Retirement/FICA on the Job page.	Enter life insurance and retirement data.
Departmental Hierarchy	GVT_DEPTINF_SEC	Click Departmental Hierarchy on the Job page.	View departmental hierarchy for the position.
Detail Assignment	GVT_DETAIL_SEC	Click Detail on the Job page.	Track information for employees on assignment. You probably won't use this page when first hiring an employee.

Page Name	Object Name	Navigation	Usage
Position	GVT_JOB2	Workforce Administration, Job Information, Hire Employee USF, Position	Enter position information like employee type, classification, appointment type, work schedule, and pay group.
Compensation	GVT_JOB3	Workforce Administration, Job Information, Hire Employee USF, Compensation	Enter employee compensation information, including pay rate determinant, pay plan/table/grade, frequency, and other pay.
Other Pay Information	GVT_OTH_PAY_SEC	Click Other Pay Information on the Compensation page.	Enter compensation that employees receive that's in addition to base pay.
Expected Pay	GVT_LOC_PAY_SEC	Click Expected Pay on the Compensation page.	View the various pay rate and compensation calculations the system calculates and displays based on the base pay and compensation frequency you enter on the Compensation page.
Accounting Information	GVT_JOBDIST_SEC	Click Accounting Info on the Compensation page.	View a summary of the employee's job earnings distribution.
Employment 1	GVT_EMPLOYMENT1	Workforce Administration, Job Information, Hire Employee USF, Employment 1	Enter current and historical employment information, such as employee service computation and conversion dates, and within-grade-increase data.
Expiration Dates	GVT_EXPIRDT_SEC	Click Exp Dates on the Employment 1 page.	Enter expiration dates for temporary promotions, position changes, sabbaticals, or detail assignments.
Appointment Info	GVT_APPDATA_SEC	Click Appt Data on the Employment 1 page.	Enter appointment limits.
Employment 2	GVT_EMPLOYMENT3	Workforce Administration, Job Information, Hire Employee USF, Employment 2	Enter additional employment data including union, probation, RIF, tenure, and security data. Also record the retained grade information.
Non Pay Data	GVT_NONPAY_SEC	Click Non Pay Data on the Employment 2 page.	Track information related to a status of nonpay. Information on this page affects FEHB eligibility and FEGLI.

Page Name	Object Name	Navigation	Usage
Time and Labor Data	TL_EMPL_DATA_FG_S	Click Time Reporter Data on the Employment 2 page.	Review PeopleSoft Time and Labor data for this employee.
Security Info	GVT_SECURTY_SEC	Click Security Info on the Employment 2 page.	Enter employee security clearance and financial disclosure information.
CI Exceptions	GVT_PAR_CI_MSG	Workforce Administration, Job Information, Hire Employee USF, CI Exceptions	Warning messages generated during the hire process are displayed on the CI Exceptions page after the transaction has been successfully saved.

Entering Information for the Hiring Process

Access the Data Control page.



Data Control page

Many of the values that you enter on this page become the default source for values on other pages throughout the system. If necessary, you can override most of these default entries when you are working on other pages.

After completing this page, you can print out the Personnel Action Request form or print a notice for this position.

Actual Effective Date Enter the actual effective date, which is used as the hire action's effective date default value throughout the system. If necessary, change this to reflect the date on which you hired the employee. When working on other pages, the dates are unavailable, so if you need to change the effective date, you do so by returning to the Data Control page.

Proposed Effective Date This field is populated by default with the date entered in the Actual Effective Date field. Human resources personnel processing a request have final

	authority on when the action becomes effective, and they will enter the official actual effective date, but the proposed effective date will remain unchanged.
Not to Exceed Date	(Optional) Enter the ending date of a temporary action (for example, the date a temporary hire expires).
Action	The default value is set to *Hire,* which is the correct value for new employees.
Reason Code	Enter the reason code for this hire, such as new position, temporary assignment, or trainee.

Note. For agency-to-agency transfers, the request may be submitted by both agencies, and the action and reason for each agency's request depends on whether the employee is arriving or leaving. If the employee is arriving, process the action as a hire. When an employee transfers in to your agency from another agency, the action is *Hire* and the reason is *Transfer From* (another agency). When an employee transfers out of your agency to another agency, the action is *Terminate* and the reason is *Transfer To* (another agency).

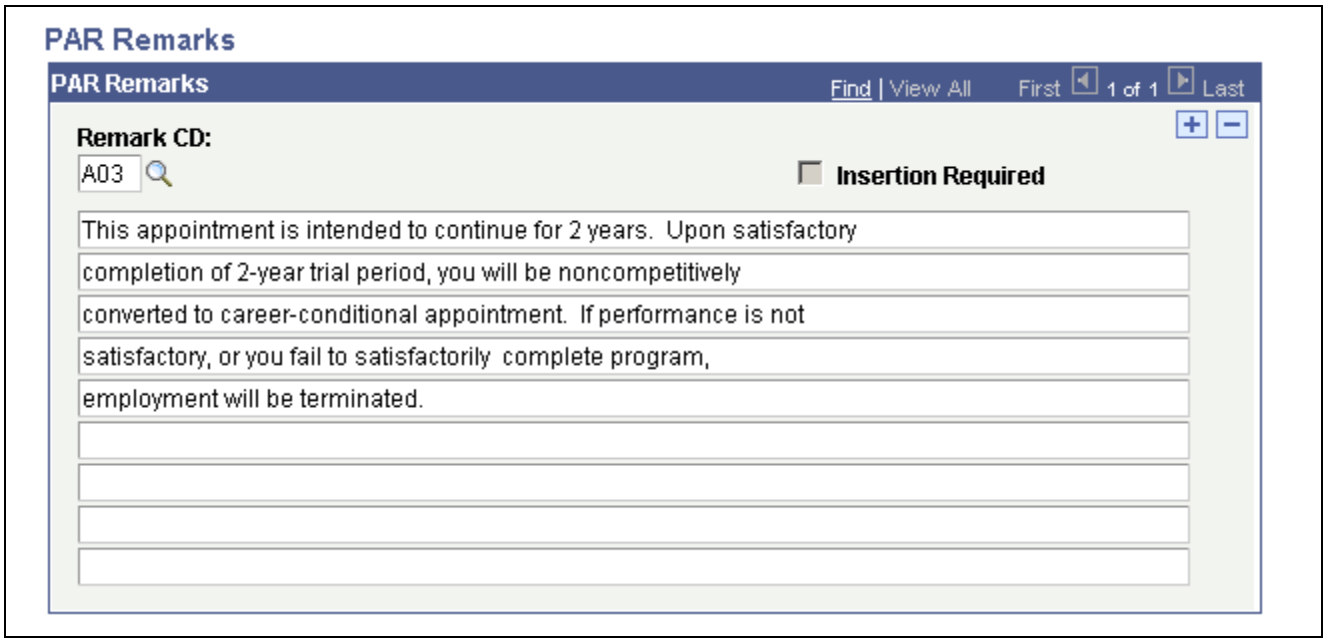
Contact Emplid (contact employee ID)	Enter the employee ID of the person to contact with any questions regarding the hire.
Authority (1) and **Authority (2)**	Select the appropriate legal authority for this NOA code. This field is usually reserved for use by human resources specialists. PeopleSoft provides a list of common legal authority codes and descriptions as provided by the US Office of Personnel Management.
PAR Request # (PAR request number)	(Optional) Enter a PAR request number for each employee request after you save this request. This field is for your agency's information only.
PAR Remarks	Click to view or enter comments specific to this position or employee situation.
Tracking Data	Click to view or enter job-tracking information.

See Also

Chapter 16, "(USF) Processing Personnel Action Requests," page 413

Entering PAR Remarks

Access the PAR Remarks page.



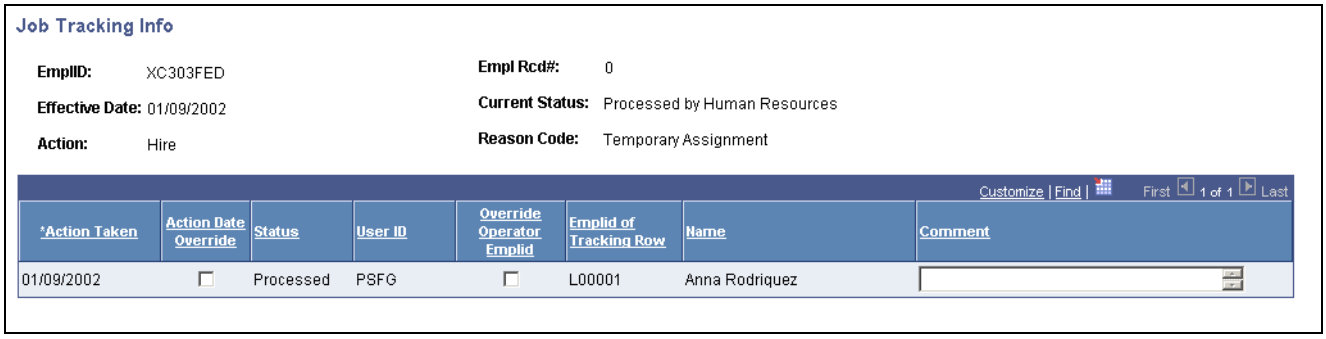
PAR Remarks page

Remark CD (remark code) Select from the list of descriptions, conditions, and comments about this position or employee action. The remarks that you select appear in the comments box. Edit them as necessary.

Insertion Required If this remark needs employee-specific information, this check box is selected. The default settings for this box are defined with the codes on the PAR Remarks Table page.

Entering Job Tracking Information

Access the Job Tracking Info page.



Job Tracking Info page

Action Taken Displays the date this initial action request was entered.

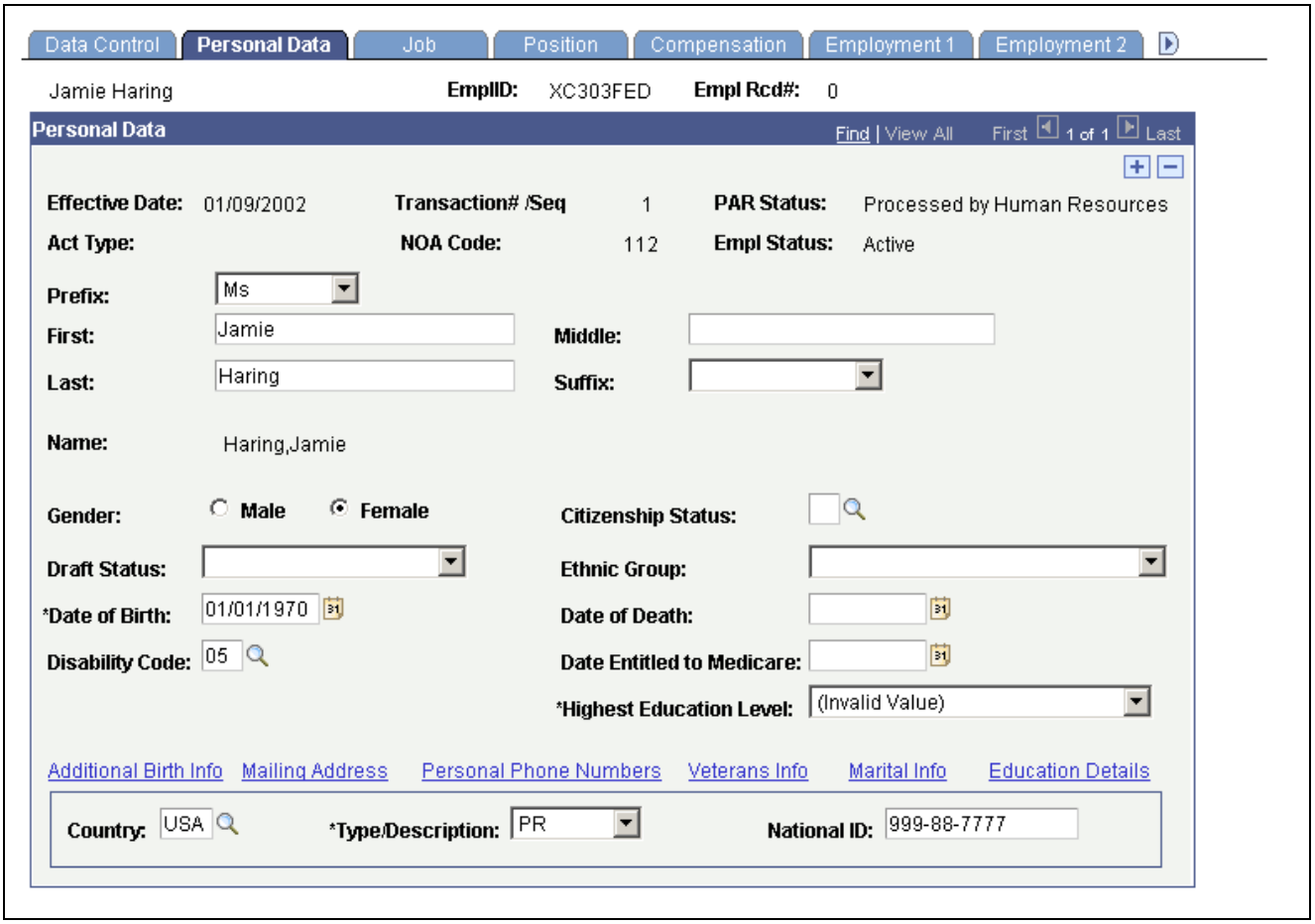
Action Dt Ovrd (action date override) Select to make the Action Taken field available for entry so that you can change the action date.

Override Operator Emplid (override operator employee ID) (Optional) Select this check box when an administrative assistant, for example, enters data on behalf of a supervisor.

Emplid of Tracking Row (employee ID of tracking row) When the Override Operator Emplid check box is selected, this field becomes available for entry. Enter the ID of the person actually performing the data entry.

Entering Employee Personal Information

Access the Personal Data page.



Personal Data page

EmplID If you instructed the system to assign the employee ID automatically, this field displays *NEW*. This changes to the next available number after you complete all the Hire pages and click the Save button. If you assigned the ID manually, the number appears immediately.

Effective Date The effective date for all of the pages in this group box is set by default to the effective date that is entered on the Data Control page. Change the effective date by returning to the Data Control page.

Gender Indicate the employee's gender.

Citizenship Status Select the appropriate citizenship status.

Draft Status (Optional) Select a draft status.

Ethnic Group Select the employee's ethnic group. Values are based on U.S. federal Equal Employment Opportunity (EEO) ethnic categories. Use ethnic group

	information to compile the establishment's Affirmative Action (AA) plan and to generate several EEO reports.
Date of Birth	Enter the employee's date of birth. If you do not enter a birth date, a warning message appears when you save the record. Though this field isn't required for the Administering Workforce business process, the system uses the date in some benefit and payroll tasks to calculate an employee's age. If you do not have the birth date currently, after you acknowledge the message, you can continue entering information. However, PeopleSoft recommends that you enter the information later.
Date of Death	Skip this field when hiring a new employee.
Disability Code	Select the disability code from the list, or if none, select the value *No Handicap.*
Date Entitled to Medicare	(Optional) Enter the date the employee is entitled to Medicare.
Country	Many countries have unique name formats. Select the country with the name format you want to use for this person. When you move out of this field, the system displays the appropriate fields for the country you entered.
Type/Description	Enter the corresponding type/description of the employee's national ID.
National ID	Enter the employee's Social Security Number.
Additional Birth Info	Click to access the Addl Birth Info page and enter the employee's birth information.
Mailing Information	Click to access the Address Information page and enter home and mailing address information.
Personal Phone Numbers	Click to access the Personal Phone Numbers page and enter employee phone, fax, cellular, and other numbers.
Veterans Info (veterans information)	Click to access the Veterans Info page and enter veterans information.
Marital Info (marital information)	Click to access the Marital Status page and enter marital information.
Education Details	Click to access the Education Details page and enter information about the employee's education.

See Also

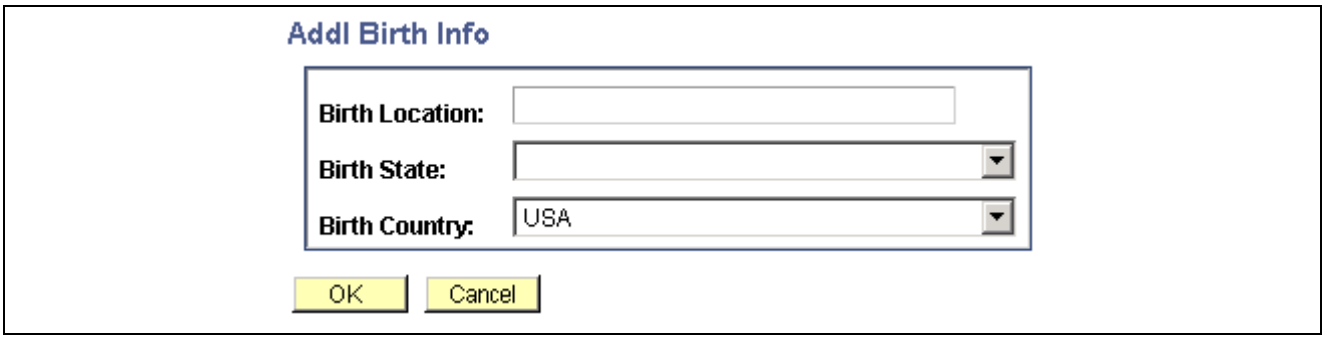
Chapter 16, "(USF) Processing Personnel Action Requests," Requesting Terminations Due to Death, page 424

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements, "(USA) Meeting Regulatory Requirements for the United States"

PeopleSoft Enterprise Human Resources PeopleBook: Manage Base Benefits

Entering Birth Information

Access the Addl Birth Info page.



Addl Birth Info page

Birth Location	Enter the name of the city.
Birth State	Select the birth state.
Birth Country	Select the birth country.

Entering Address Information

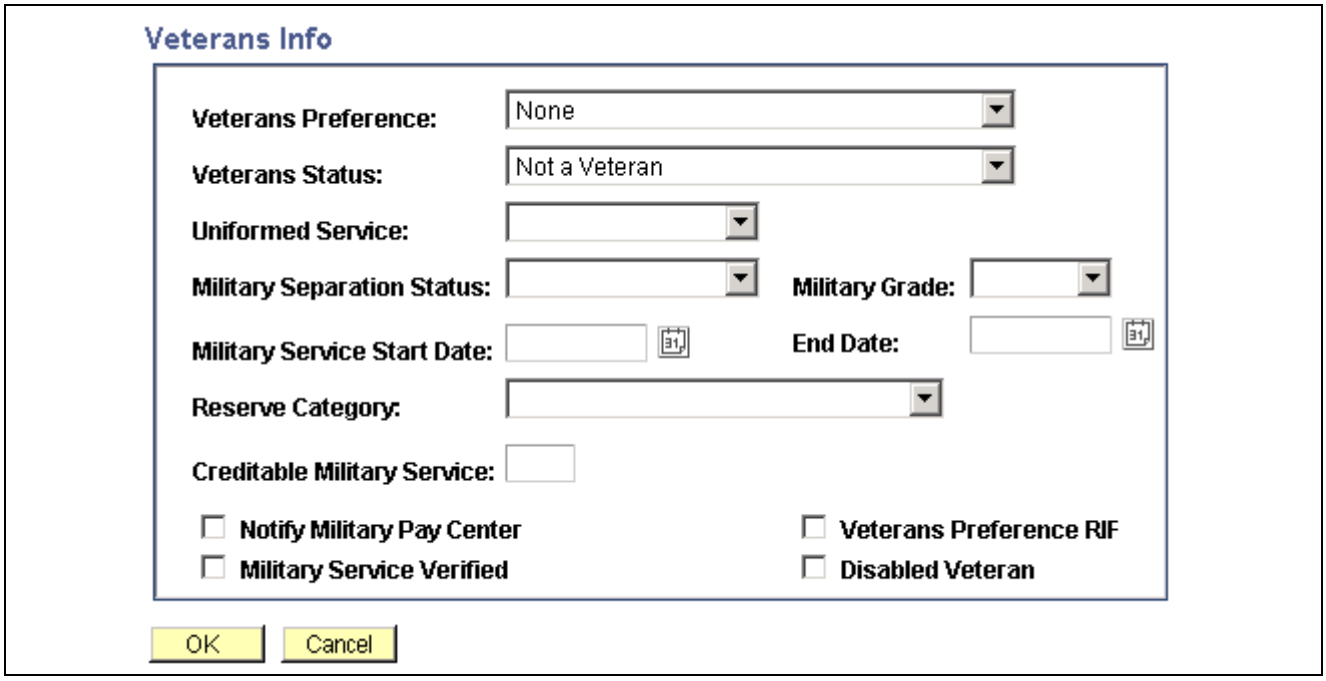
Access the Address Information page.

Address Information page

Select the country and then click Edit Address. Fill out the address fields on the page that appears and click OK. The address information appears in the Address field.

Entering Veteran Information

Access the Veterans Info page.

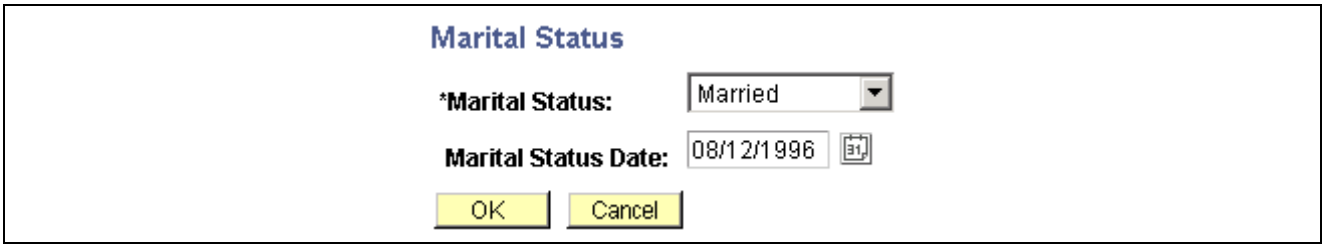


Veterans Info page

Veterans Preference	Select the veteran's hiring preference that applies. For information about preference guidelines refer to the *U.S. Office of Personnel Management's Vets Info Guide.*
Veterans Status	Select the veteran's status.
Uniformed Service	Select the type of uniformed service in which this veteran served.
Military Separation Status	Select the veteran's military separation status.
Military Grade	Select the veteran's military grade.
Military Service Start Date and **End Date**	Enter the veteran's military service start and end dates.
Reserve Category	Select the employee's reserve category, or select *Not Applicable.*
Creditable Military Service	Enter the creditable military service.
Notify Military Pay Center	Select to notify the military pay center.
Veterans Preference RIF (veterans preference reduction in force)	Select to indicate the employee is eligible for veteran's preference in instances of Reductions In Force. See the *U.S. Office of Personnel Management's Vets Info Guide* for more information.
Military Service Verified	Select if you have received verification of service.
Disabled Veteran	Select if the veteran is disabled.

Entering Marital Information

Access the Marital Status page.



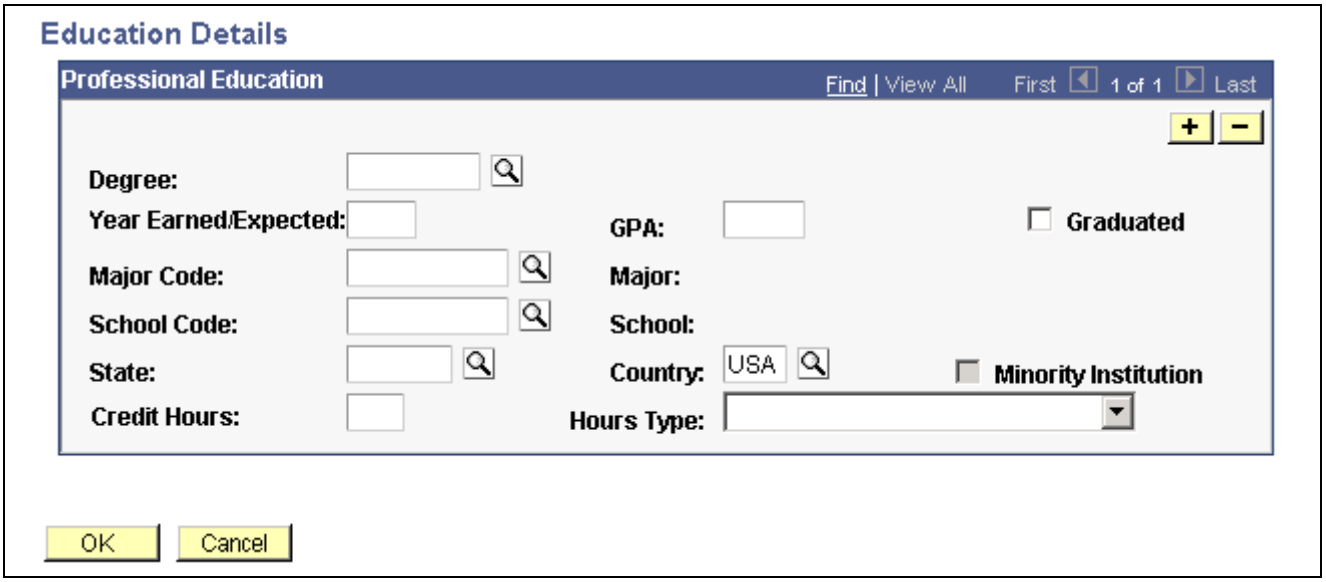
Marital Status page

Marital Status Select the person's marital status.

Marital Status Date Enter the date on which this status took effect.

Entering Education Details

Access the Education Details page.



Education Details page

Note. The Education Details page link is active only during the hiring process. To update education information on existing employees use the Professional Education and Training page through the Workforce Development, Competency Management, Track Person Competencies, Education navigation.

Degree Select the degree earned or expected for the employee.

Note. This information must be set up on the Degree Table page in the Set Up HRMS, Common Definitions, School Information menu.

Year Earned/Expected Enter the year the degree was earned or is expected to be earned if the employee has not graduated.

GPA (grade point average) Enter the employee's grade point average from the school.

Graduated Select if the employee has graduated.

Major Code Select the major code for the degree earned or being earned.

Major Enter a major if there is not a code for it.

School Code Select the code designating the school the employee graduated from or currently attends.

School Enter a school if there is not a code for it.

State Enter the state where the school is located.

Country Select the country where the school is located.

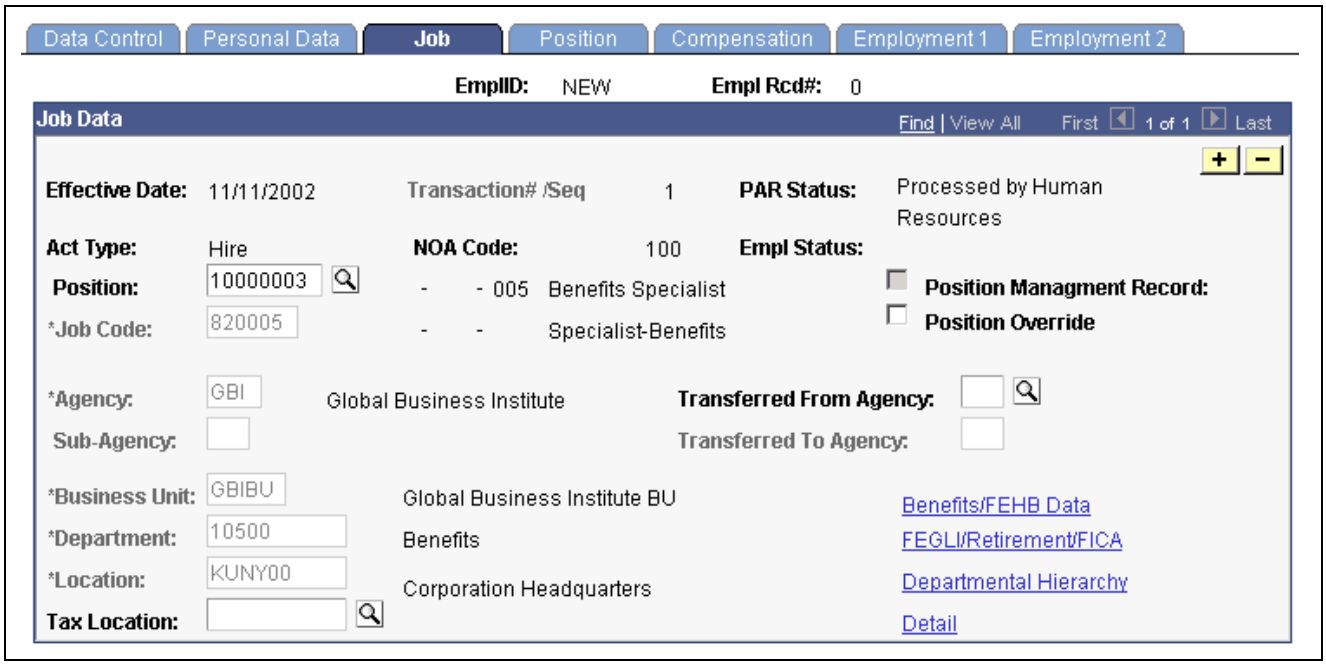
Minority Institution Select if the employee attended or attends a designated minority institution.

Credit Hours Enter the credit hours earned either upon completion or to this point if not complete.

Hours Type Select the hours type. Values are: *Continuing Education, Other Pay, Quarter Hours,* and *Semester Hours.*

Entering Job Information

Access the Job page.



Job page

Many values on this page are set by default from values you entered earlier on the Data Control page. If necessary, you can override most of these defaults.

Act Type (action type) Set by default to *Hire,* which is the correct choice for new employees.

Position Select a position. When you move out of this field, the system completes position-related fields with default data from the Add/Update Position Info component if the Manage Positions business process is being used. Job code,

agency, subagency, business unit, department, and location all are set by default to position management data.

In addition, the system inserts a default value in the Supervisor's ID and Reports to Position fields on the Employment 2 page if these are entered when setting up the position.

If you've associated agencies with departments on the Department page, the system enters the agency code on the Job page and the field is unavailable for entry. It also enters default values on the Position page for the Pay Periods/Year, Employee Type, Holiday Schedule (which you define in the Pay Group table), and Pay Group fields (which you associate with a position in the Add/Update Position Info component in the Organizational Development, Position Management, Maintain Positions/Budgets menu). On the Position page, the system enters the standard hours that correspond to the job code. If you've associated them with the job code on the Job Code page, the system also enters the pay plan/table/grade, and compensation frequency on the Compensation page. In addition, on the Compensation page, the system enters the grade/step entry (date), which is the date the employee was first assigned to the grade and step. The Position Number, Hire Date, and Position Override fields are discussed in Hiring Employees Into Positions.

Position Management Record

Indicates whether updates to the Position Management record are now reflected here. For hiring, the value is N, as the new hire would not have information to update.

If your organization uses the Manage Positions business process and this position were updated this would be Y. The option then would be to select the Position Override check box to make changes to position data that are otherwise locked in by the position data record.

Job Code

If you are not using the Manage Positions business process, enter the job code. Otherwise, the job code is derived from the value established in the Add/Update Position Info component.

Position Override

Select to change any of the position-related fields, such as the Job Code, Department, Agency, and Sub-agency.

PeopleSoft Enterprise Human Resources issues a warning message if you assign an employee to a position that has already been filled by another employee or if a new employee appointment exceeds the maximum head count for that position.

Note. After you have assigned an employee to a position, you must maintain all employee data manually while the employee is assigned to this position in the system. The system won't update position data automatically for the employee when position information is changed.

Agency, Sub-Agency, Business Unit, Department, and **Location**

Select the ID types for these fields individually. If the position management hiring process is used, the system enters default values here when the Position ID is selected.

Transferred From Agency

If the reason code entered on the Data Control page was *Transfer,* select the agency from which the employee is transferring.

Transferred To Agency This is not a valid field in the hiring process. This field is used primarily in other types of PAR requests. It becomes active based on the action and reason code entered on the Data Control page.

Tax Location Derived from the department-tax location relationship established on the Department page.

See Also

Chapter 16, "(USF) Processing Personnel Action Requests," page 413

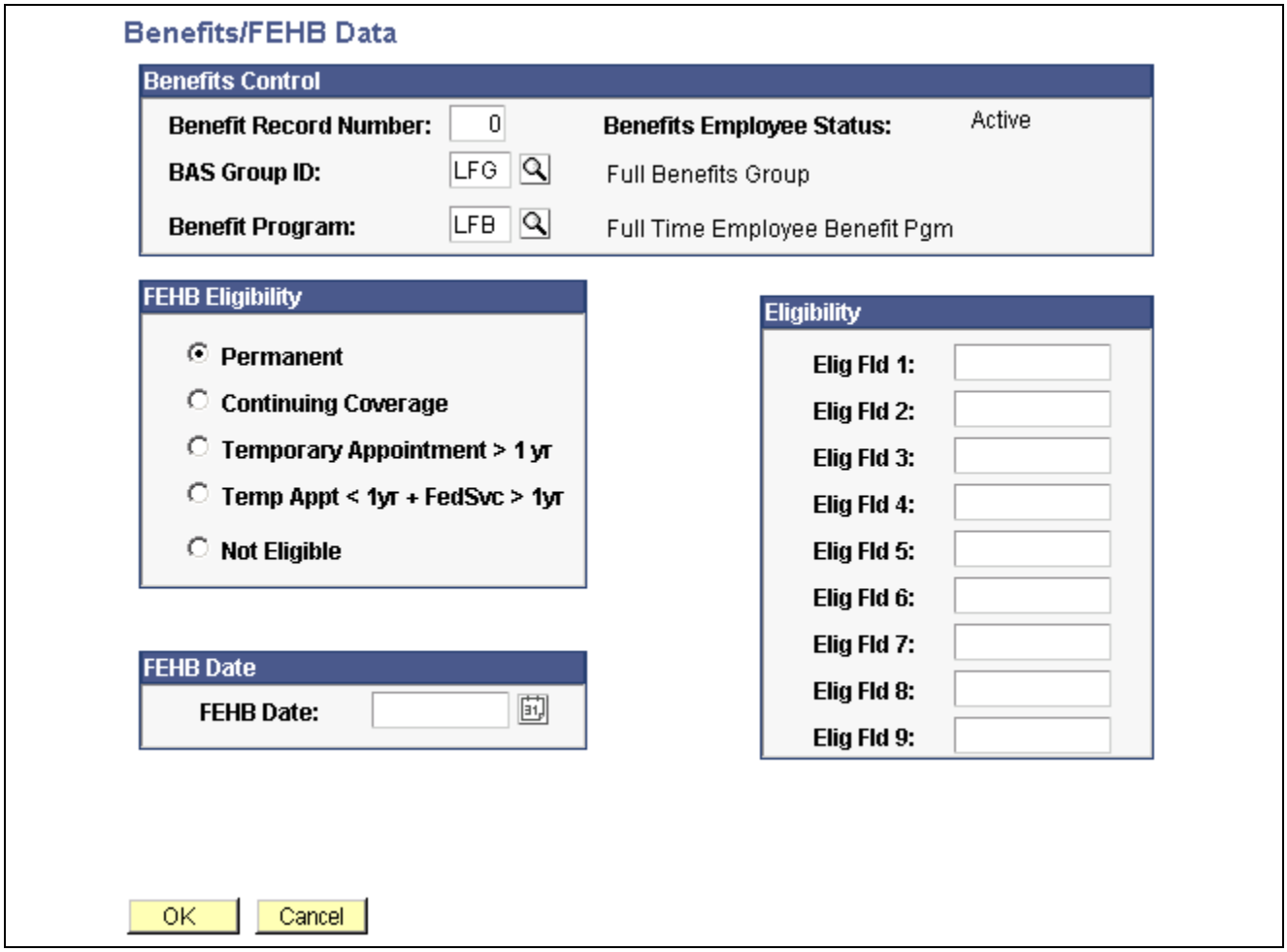
Chapter 2, "Setting Up the Administer Workforce Business Process," Defining Personnel Actions and Reasons, page 5

PeopleSoft Enterprise Payroll Interface 8.9 PeopleBook, "Setting Up Payroll Schedules"

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions, "Managing Position Data"

Specifying Benefit Programs

Access the Benefits/FEHB Data page.

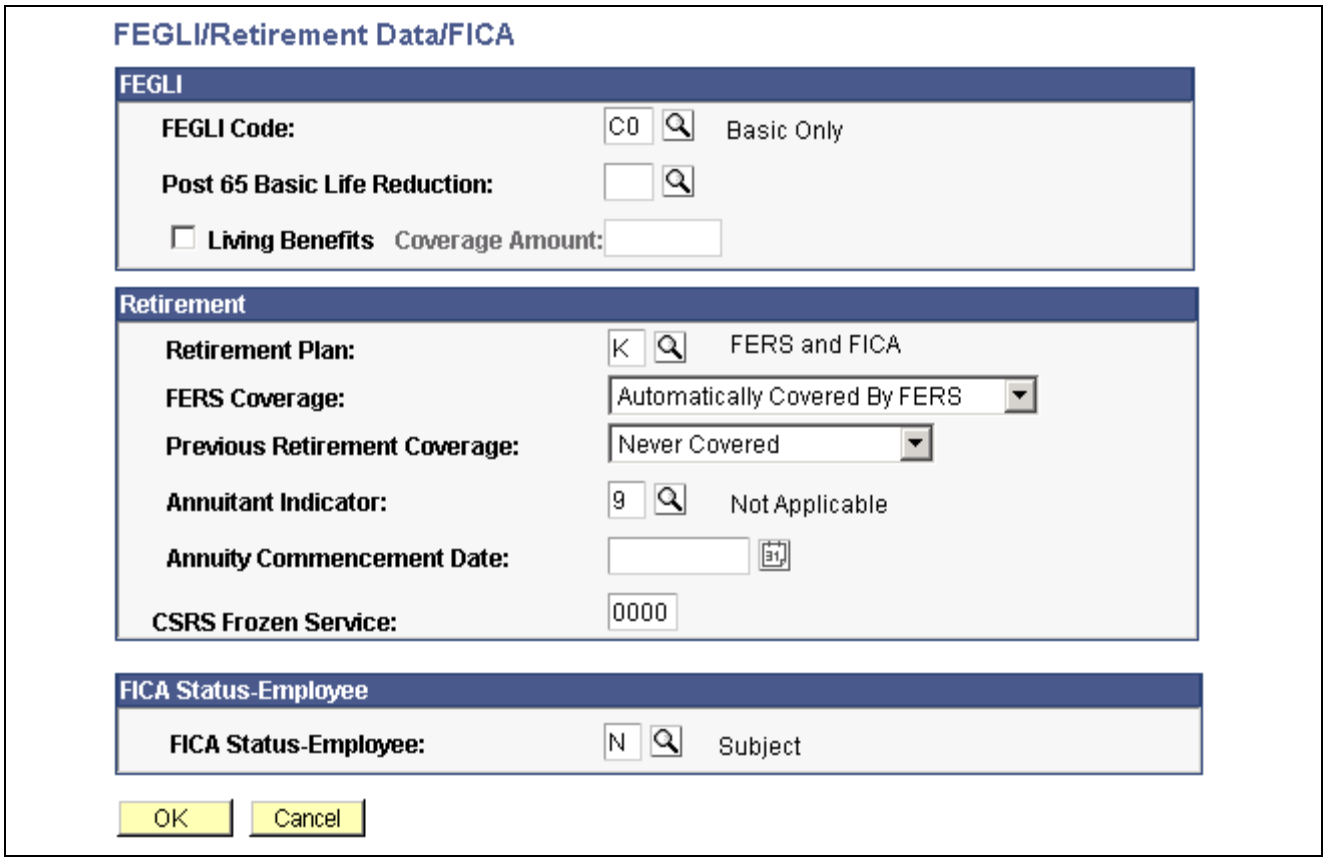


Benefits/FEHB Data page

Benefit Record Number	Benefit record number is used to group several jobs together for benefit purposes. A benefit record number can be assigned to multiple employee record numbers. If the new job entitles the employee to a new set of concurrent benefits, you should use a new benefit record number. If the job does not entitle the employee to new benefits, you should use an existing benefit record number. Each benefit record number must have a designated primary job. The primary job is used to process the benefit information.
BAS Group ID (benefits administration system group ID)	(Optional) Enter a BAS group ID.
Benefit Program	(Optional) Enter a benefit program.
FEHB Eligibility (federal employees health benefits eligibility)	Select the appropriate option to indicate the FEHB eligibility. If you select *Not Eligible,* the FEHB Date field becomes available for entry. This typically applies to temporary employees.
FEHB Date (federal employees health benefits date)	Enter the date that the employee is eligible for FEHB.
Elig Fld 1 − 9 (eligibility field 1 - 9)	These fields further define an employee's benefits eligibility. Each agency determines its own use of these fields. Contact the agency's Personnel Policy Officials for instruction using these fields.
Benefits System	Select which PeopleSoft benefits system you are using to administer this employee's benefits: PeopleSoft Enterprise Human Resources Manage Base Benefits or Benefits Administration.

Entering Retirement Data

Access the FEGLI/Retirement/FICA page.



FEGLI/Retirement/FICA page

FEGLI

FEGLI Code (federal employees group life insurance code)
Enter the FEGLI code.

Post 65 Basic Life Reduction
Select the employee's post-65 basic life reduction coverage.

Living Benefits and **Coverage Amount**
Use these fields only when selecting living benefits (not during the hiring process).

Retirement

Retirement Plan
Select the employee's retirement plan.

In addition to the retirement plans used for submission to Central Personnel Data File (CPDF), PeopleSoft supplies the following codes that you may use for documentation purposes only:

Code	Explanation
7	For foreign national employees exempt from retirement and from social security and Medicare tax deductions.
8	U.S. Court of Veterans Appeals without election of survivor annuity benefits. Code is for use by the judges of the U.S. Court of Veterans Appeals only.
9	U.S. Court of Veterans Appeals with election of survivor annuity benefits. Code is for use by the judges of the U.S. Court of Veterans Appeals only.
A	Article III judges and justices.
B	Bankruptcy judges and justices under the Judicial Retirement System.
S	U.S. Claims Court Judges Retirement System.
V	Clerks/magistrates (CSRS).
U	Bankruptcy judges (full FICA/partial CSRS).
Y	Bankruptcy judges (full FICA/full CSRS).

FERS Coverage (Federal Employees Retirement System coverage) Select the employee's FERS coverage.

Previous Retirement Coverage Select the employee's previous retirement coverage.

Annuitant Indicator Select the employee's annuitant indicator.

Annuity Commencement Date If the new employee is a reemployed annuitant, enter the annuity commencement date.

CSRS Frozen Service (Civil Service Retirement System frozen service) Enter the total years and months of civilian and military service that is creditable in a CSRS component of a FERS employee, or, in the case of a CSRS offset employee, the service that would be included in a CSRS component if the employee ever becomes covered by FERS.

FICA Status-Employee

FICA Status-Employee Indicate whether the employee is exempt, subject, or subject to Medicare only.

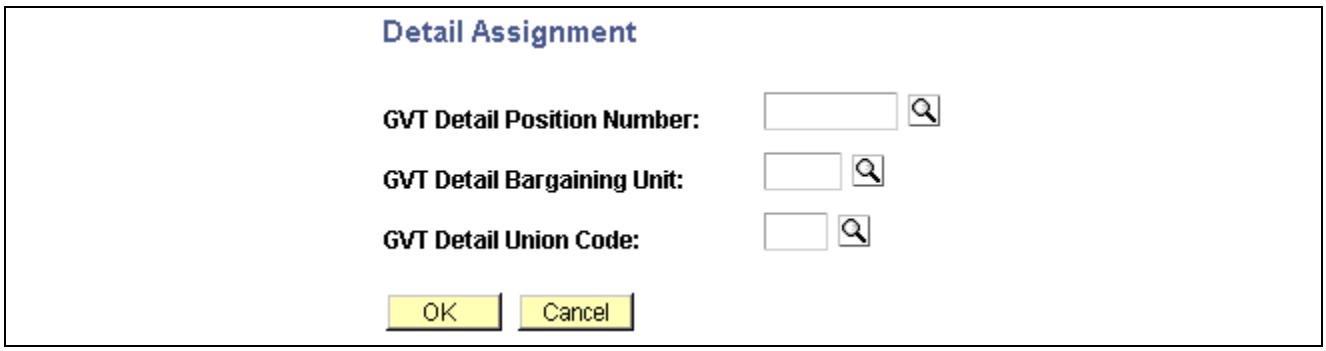
See Also

Chapter 16, "(USF) Processing Personnel Action Requests," Requesting Terminations Due to Death, page 424

PeopleSoft Human Resources PeopleBook: Manage Base Benefits

Tracking Information for Employees on Assignment

Access the Detail Assignment page.



Detail Assignment page

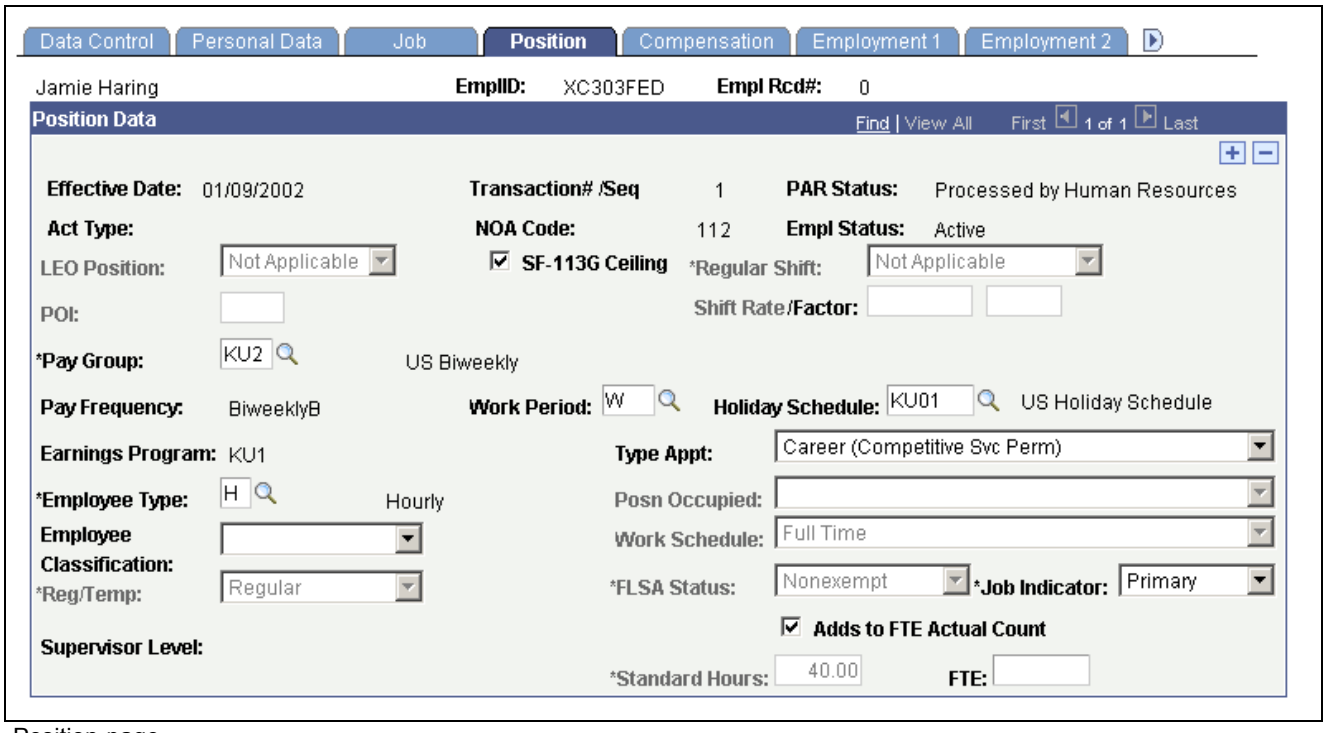
GVT Detail Position Number (government detail position number) Select the employee's detail position number.

GVT Detail Bargaining Unit (government detail bargaining unit) Select the employee's detail bargaining unit.

GVT Detail Union Code (government detail union code) Select the employee's detail union code.

Entering Position Information

Access the Position page.



Position page

LEO Position (law enforcement officer position)	If this is a law enforcement officer position, a value appears from the Job Code page.
SF-113G Ceiling	If this position is reportable for the SF-113G ceiling, select this check box.
POI (personnel office identifier)	Set by default from the Add/Update Position Info component or the Job Code page.
Regular Shift	If the employee is working shifts, select the appropriate shift.
Shift Rate/Factor	Define the shift rate/factor only if the shift differential is specified at the employee level.
Pay Group	(Required) A value appears here if you defined one on the Position Data page. Otherwise, select a pay group.
Pay Frequency	Set by default from the Pay Group page.
Work Period	Select the time period in which employees must complete the standard hours. The system uses the annualization factor of the standard work period, in combination with the standard hours, to calculate FTE (full-time equivalency).
Holiday Schedule	If you linked an established holiday schedule on the Pay Group page, it appears here.
Employee Type	Depends on the pay group and is set by default from the Pay Group page. If an employee type doesn't exist for this pay group, establish one on the Pay Group page or enter one here.
Employee Classification	Provides another method of grouping employees.
Reg/Temp (regular/temporary)	Indicate whether the new hire is a regular or temporary employee. The Manage Base Benefits business process of PeopleSoft Enterprise Human Resources uses this value when determining eligibility requirements.
Supervisor Level	If the employee is in a supervisory position, this value is set by default from the Position Data page.
Type Appt (type of appointment)	Enter the employee's type of appointment, such as *Career* (Competitive Service Permanent), *Limited, Executive,* or *Schedule A - C.*
Posn Occupied (position occupied)	This field identifies the type of appointment which can occupy the position. Values are Competitive, Excepted Senior Executive Service (SES) Career Reserved and SES General. This is a CPDF reported field.
Work Schedule	Set by default from the Add/Update Position Info – Description page.
FLSA Status (Fair Labor Standards Act status)	Set by default from the position data on the Job Code page.
Adds to FTE Actual Count (adds to the full-time equivalency actual count)	Select to include this employee's job when processing FTE edits for budgeting purposes.
Standard Hours	The field is populated by default with the standard hours for the agency as specified in the Installation tables. You can change this information manually.
FTE (full-time equivalency)	The percentage of full-time the employee should normally work in this job. The system calculates this value based on the standard hours entry

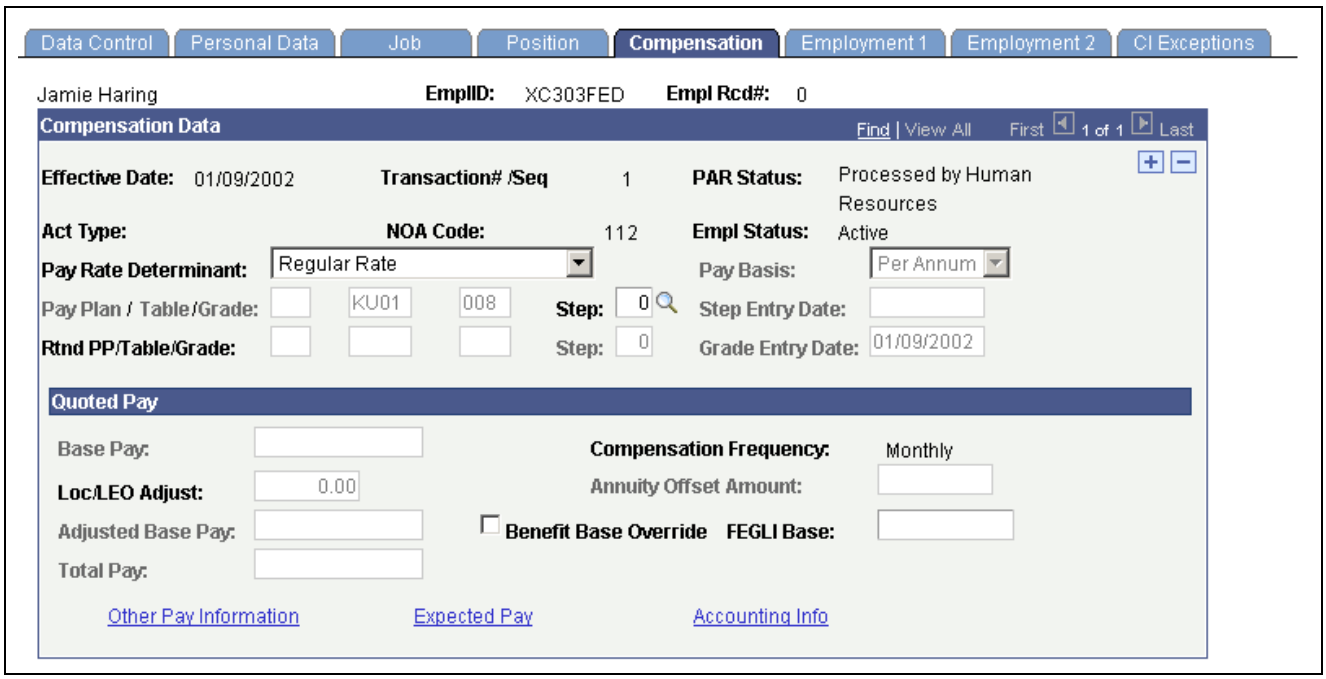
for this job and the standard work period. However, you can override the system-calculated FTE and enter a new value less than 1.0.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Working with Frequencies"

Entering Employee Compensation Information

Access the Compensation page.



Compensation page

Note. Multiple Components of Pay, Derivation of Rates, and related features are not currently supported by PeopleSoft Enterprise Human Resources USF functionality.

Many values on this page are set by default from values you entered in the Department and Job Code fields on the Job page. Override these values if necessary.

Pay Rate Determinant Select a pay rate determinant.

Pay Plan/Table/Grade Select the pay plan, table, and grade.

Step Assign the correct step for the employee.

Note. For certain Pay Rate Determinants this is not an option and the field does not accept data.

Step Entry Date The effective date of the request for this action.

If the Multi-Step/Grade check box is selected on the Installation table and you select a step on this page, the system automatically enters the base pay for that step.

Rtnd PP/Table/Grade (retained pay plan/table/grade) — There are several instances where retained grade or pay is authorized based on prior federal experience within the employing agency or at another federal agency. After selecting the appropriate pay rate determinant (for example, Retained Grade-Diff Posn), you can enter information in this field.

Step and **Grade Entry Date** — Enter the step and the date the employee was first assigned to the grade and step.

Base Pay — If you are using partial or full position management, a value is set by default here based on your prior assignment in the Step field.

A GM pay plan position is the exception to this rule. Because the GM pay plan has no steps, you must enter the base pay amount.

If you selected the Position Override check box on the Job page, you may also enter a base pay amount for a position with steps. This is appropriate in cases where the base pay amount is beyond the step 10 level.

Enter the base pay amount based on the compensation frequency period indicated. For example, if the frequency period is one month, the base pay entered would be the pay earned for one month. The system calculates and displays the value in the Loc/LEO Adjustment (if appropriate) and Total Pay fields after you have provided the compensation data.

Adjusted Base Pay — The system calculates and displays the adjusted base pay by applying the Loc/LEO adjustments to the employee's base pay. This field is used for pay limits computation of the locality pay.

Compensation Frequency — Set by default from the Job Code page; override if necessary.

Annuity Offset Amount — If the employee is an annuitant, enter a CSRS annuity offset amount.

FEGLI Base — The system calculates the FEGLI base rate. Select the Benefit Base Override check box to override this default and then enter a new amount.

Other Pay Information — Click to access the Other Pay Information page and enter compensation that employees receive that's in addition to base pay.

Expected Pay — Click to access the Expected Pay page and view the various pay rate and compensation calculations the system calculates and displays based on the base pay and compensation frequency that you enter on this page.

Accounting Info — Click to access the Accounting Information page and view a summary of the employee's job earnings distribution.

If you selected the Multi-currency check box on the Installation table and entered the base pay in a different currency from your base currency, the system converts the rates to the base currency and compares them with the ranges specified for this salary grade in the Salary Grade table. If the rates exceed the salary range, a warning message appears.

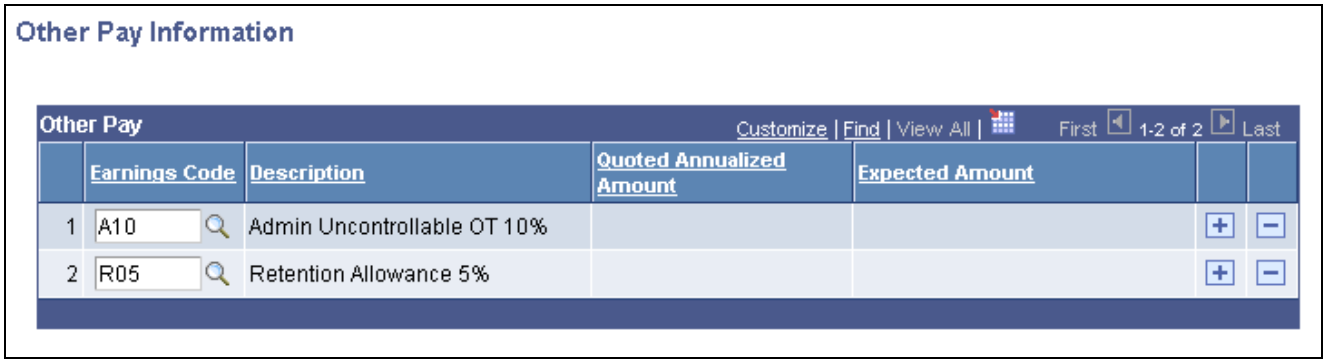
Default Values for Employment Data

After you enter job and position data, pay information is populated by default on the Compensation page. If you associated pay plans with job codes, the Pay Plan field is populated by default from the data in the Job Code table. The Grade field is populated by default from the Job Code page. After the values in the Pay Plan and Grade fields appear, the system also displays the Grade Entry Date field, which is the date the employee first joined the grade. When a value is entered in the Step field, the value in the Step Entry Date field populates by default. You can override these values if you choose.

The system verifies any combinations of pay plans and grades that you select. If the combination doesn't exist, a warning message appears.

Entering Additional Compensation Information

Access the Other Pay Information page.



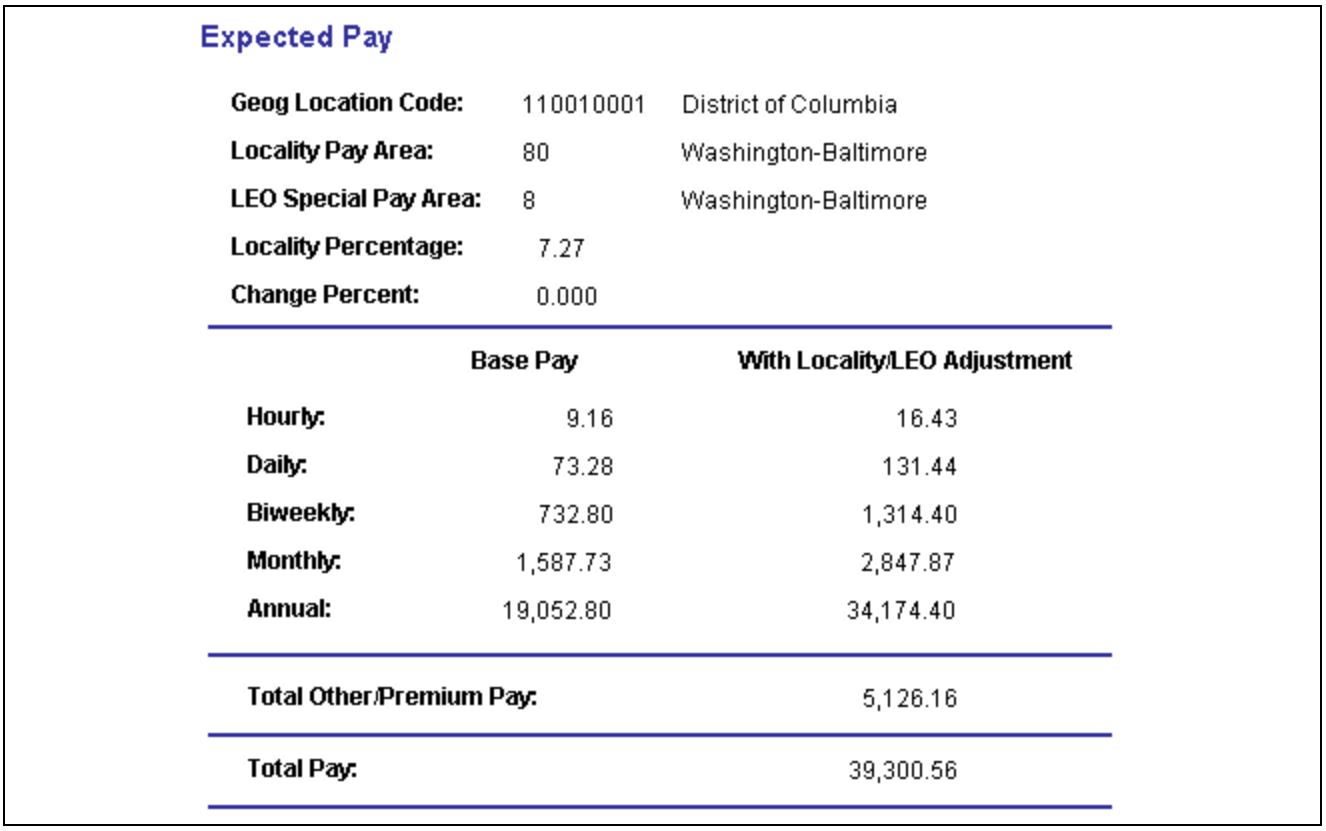
Other Pay Information page

Earnings Code Select the code for the additional pay type, such as automobile and beeper allowances. The system issues a warning indicating that the earnings code may be applicable to pay limits, at which time the employee's earnings calculation within payroll may be reduced.

Note. A message appears when you enter premium pay that is subject to a pay limit. During payroll calculation, if the premium earnings plus adjusted base pay exceed the pay limit, the premium pay is reduced.

Viewing Pay Rate and Compensation Calculations

Access the Expected Pay page.



Expected Pay

Geog Location Code:	110010001	District of Columbia
Locality Pay Area:	80	Washington-Baltimore
LEO Special Pay Area:	8	Washington-Baltimore
Locality Percentage:	7.27	
Change Percent:	0.000	

	Base Pay	With Locality/LEO Adjustment
Hourly:	9.16	16.43
Daily:	73.28	131.44
Biweekly:	732.80	1,314.40
Monthly:	1,587.73	2,847.87
Annual:	19,052.80	34,174.40

Total Other/Premium Pay:	5,126.16
Total Pay:	39,300.56

Expected Pay page

Change Percent Displays information regarding a percent change when new rows are inserted that change the base salary amounts.

Base Pay Based on the base pay and compensation frequency you enter, the system calculates and displays the hourly, daily, biweekly, monthly, and annual rates for this employee.

With Locality/LEO Adjustment The system calculates the same base pay figures using the locality/LEO adjustment listed at the top of the page.

Total Other/Premium Pay The total of annual expected pay for the items you entered on the Other Pay Information page.

Total Pay The system calculates total pay by summing the annual pay with the locality/LEO adjustment and the total other/premium pay contributions.

Note. The Rate Change Amount and Rate Change Percent fields are used when awarding increases (not for new hires).

If expected pay exceeds the pay cap, a message appears at the bottom of the page warning that the pay cap has been reached and pay was reduced.

Understanding Expected Pay and Quoted Pay Within PeopleSoft Human Resources Management for U.S. Federal Government

The difference between expected pay and quoted pay occurs as a result of the conversion factors used when comparing yearly and hourly pay rates on the Pay Plan page in the Pay Plan Table component and the Expected Pay Rate page.

Rather than using the hourly conversion factor of 2080, as is often used as a business calculation factor, the U.S. federal government uses 2087.

The Expected Pay page calculates the daily, biweekly, monthly, and annual rates using the base pay amount from the Compensation page. These figures are based on the hourly conversion factor you set for the pay plan on the Pay Plan table, typically 2087.

It also breaks out into separate columns the pay into base pay (no locality, no adjustments), pay with locality, and LEO pay. Total other/premium pay is also calculated based on the amounts entered on the Other Pay Information page. So, as a result of using 2087 in these calculations, the estimated quoted pay on the Compensation page is slightly higher than what the federal employee actually receives in a year.

These two fields for expected and quoted pay may not match. The procedures that the federal government has for deannualizing and reannualizing quoted compensation rates are the cause of the difference. To deannualize a quoted rate of pay (convert to hourly), you divide the quoted rate of pay by 2087. To reannualize a quoted rate of pay to determine the expected pay, you multiply the derived hourly rate by the employee's scheduled weekly tour of duty and then multiply that by 52 weeks.

Following are two examples:

Example 1

Full-time employee (40 hours per week) with quoted rate of 41,740 USD per year.

Quoted rate = 41,740 USD.

Hourly rate = quoted rate/2087 hours = 41,740 USD/2087 hours = 20 USD/hour.

Expected pay = hourly rate × standard weekly tour × 52 weeks = 20 USD/hour × 40 hours/week × 52 weeks = 41,600 USD.

Difference between quoted and expected pay on an annual basis = 140 USD.

Example 2

Part-time Employee (20 hours per week) with quoted rate of 41,740 USD per year

Quoted rate = 41,740 USD.

Hourly rate = quoted rate/2087 hours = 41,740 USD/2087 hours = 20 USD/hour.

Expected pay = hourly rate × standard weekly tour × 52 Weeks = 20 USD/hour × 20 hours/week × 52 weeks = 20,800 USD.

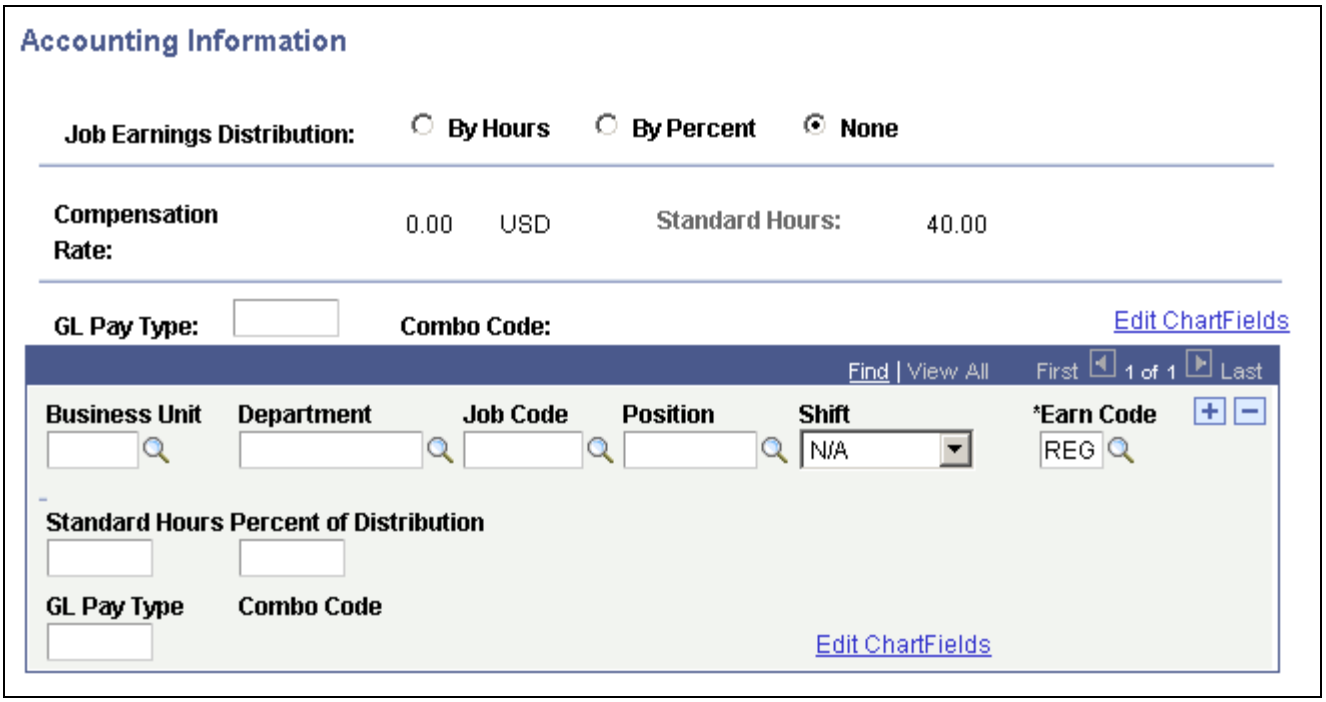
Difference between quoted and expected pay on an annual basis = 20,940 USD.

See Also

Chapter 16, "(USF) Processing Personnel Action Requests," page 413

Viewing Job Earnings Distributions

Access the Accounting Information page.



Accounting Information page

Job Earnings Distribution Select the appropriate option to indicate the job earnings distribution frequency: by hours, by percent, or not at all.

When you select the By Hours or By Percent options, the GL Pay Type and Account Code fields are unavailable for entry. Use the scroll bar to distribute earnings among departments.

If you select the By Hours option, then enter the hours to be distributed to each department in the Standard Hours field corresponding to each department entered.

If you select the By Percent option, enter a percentage corresponding to each department in the Percent of Distribution field. Percentages must total 100 percent and must equal the value in the Standard Hours field.

Compensation Rate The annual salary, including the locality and LEO adjustments.

Standard Hours Set by default from the Job Code page.

GL Pay Type (general ledger pay type) Enter the GL pay type that has been established by your agency.

Account Code Indicate the type of account to which the earnings will be charged.

Business Unit, Department, Job Code, Position, and **Shift** Select the business unit, department, job code, position, and shift to which to charge the earnings.

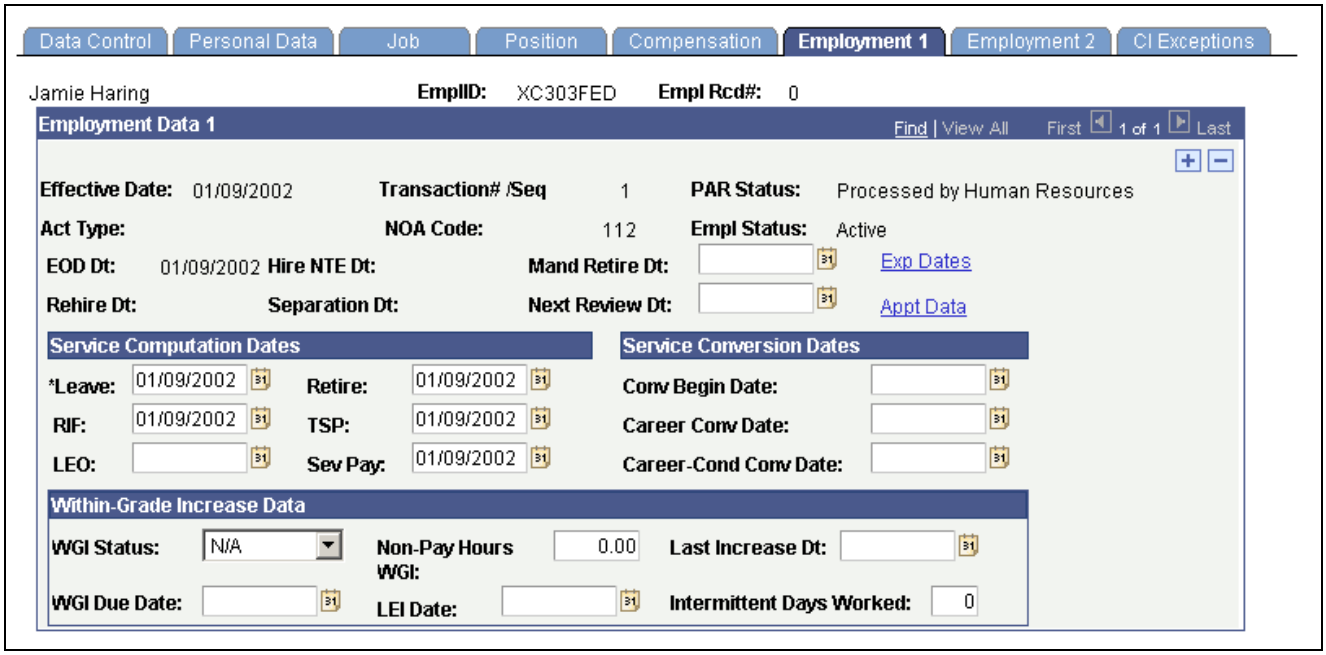
Earn Code (earnings code) Specify the earnings code. This will default to the Regular Earnings code defined on the Paygroup Table.

Hours If you select the By Hours option, then specify how many hours will be charged to the corresponding earnings code.

Percent of Distribution If you select the By Percent option, enter the percent to be charged to the corresponding earnings code.

Entering Current and Historical Employment Information

Access the Employment 1 page.



Employment 1 page

Many values on this page are set by default from values entered in the Department and Job Code fields on the Job page. When hiring a new employee, the system populates most of the dates on this page with the effective date of the hire action. These dates are used later in various ways to calculate the employee's service time. Override values as necessary.

If at a later date you change the status of an employee's employment, depending on the administrative action you select in the Job Data pages, the system will display the rehire date.

The Separation Date field is display-only, and shows the date that the employee left employment.

EOD Dt (entered on duty) Reflects the effective date of the hire request after you save the request. This date is distinct from the SCD dates in that it describes when the employee started federal employment with the employing agency; it does not reflect total federal service involving the employee's total career.

Hire NTE Dt (hire not to exceed date) Set by default from the Not to Exceed Date field on the Data Control page. In the case of a temporary hire, it designates the length of time the temporary employment can last.

Mand Retire Date (mandatory retirement date) If applicable, enter the employee's mandatory retirement date.

Exp Dates (expiration dates) Click to access the Expiration Dates page and enter expiration dates for temporary promotions, position changes, sabbaticals, or detail assignments.

Next Review Dt (next review date) Enter the next review date. This date, while informational only, can serve as a tickler date for employee performance review.

Appt Data (appointment data) Click to access the Appointment Info page and enter appointment limits.

Service Computation Dates

Leave Enter the service computation date for beginning the employee's leave computation.

Retire Enter the service computation date for beginning the employee's retirement computation.

RIF (reduction in force) Enter the computation date for establishing the employee's RIF position.

TSP (thrift savings plan) Enter the computation date for beginning the employee's thrift savings plan eligibility computation.

LEO (law enforcement officer) Enter the computation date for beginning the employee's law enforcement officer retirement computation.

Sev Pay (severance pay) Enter the service computation date for establishing the employee's severance pay computation.

Service Conversion Dates

Conv Begin Date (conversion begin date), **Career Conv Date** (career conversion date), and **Career Cond Conv Date** (career-conditional conversion date) Enter the conversion begin date, the career conversion date, and the career-conditional conversion date. If the employee is hired using a career-conditional appointment, the conversion begin date is the effective date of the hire. Upon completion of the three-year period, the personnel office processes a PAR converting the employee to a career appointment and enters that effective date in the Career Conv Date field. If the employee was hired under a temporary appointment, the conversion begin date is the effective date of the hire. When the personnel office processes a PAR to convert the temporary employee to a permanent employee with a conversion to career conditional competitive appointment, the Career-Cond Conv Dt field is the effective date for that transaction.

Within-Grade Increase Data

WGI Status (within-grade increase status) Enter the WGI status, such as *(none), Approved, Waiting, Denied, N/A,* or *Postponed.* For a new employee, the default value is *Waiting. Created* is an option for WGI status, which is reserved for the automatic WGI process. Do not change this online, as the WGI process won't select it unless the status is *Waiting* or *Approved.*

Non Pay Hours WGI and **Intermittent Days Worked** Leave these informational fields blank at hire. After running the WGI/Tenure Update process for leave without pay and processing a PAR, update the Non Pay Hours WGI field with nonpay hours from the WGI/Tenure Update report.

Last Increase Dt (last increase date), **WGI Due Date,** and **LEI Date**(last equivalent increase date) The system automatically enters the last increase date, LEI date, and WGI due date. For certain actions, the WGI Due Date field is set by default to the pay period begin date based on the pay calendar tables that your organization has established. For WGI due date calculation, it is imperative that you set up your pay calendars for this year, plus three years in advance of the current year. For example, if the current year is 1999, then your pay calendars need to be set up for 1999, 2000, 2001, and 2002.

If you enter a date that isn't the beginning of a pay calendar, the system displays a message suggesting valid pay calendar begin dates into which your date falls. If the system suggests a date of January 1, 1899, this indicates that your pay calendars do not exist. See your implementation project manager about creating additional pay calendars.

After running the WGI/Tenure Update process for leave without pay and processing a PAR, update the WGI Due Date field with the extended due date from the WGI/Tenure Update report.

See Also

Chapter 17, "(USF) Processing Automatic Actions for Probation, Tenure, and WGIs," page 425

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up Pay Calendars"

Entering Expiration Dates

Access the Expiration Dates page.

Expiration Dates page

The following fields, which are updated by the user, are informational only.

Temporary Promotion Enter the temporary promotion date.

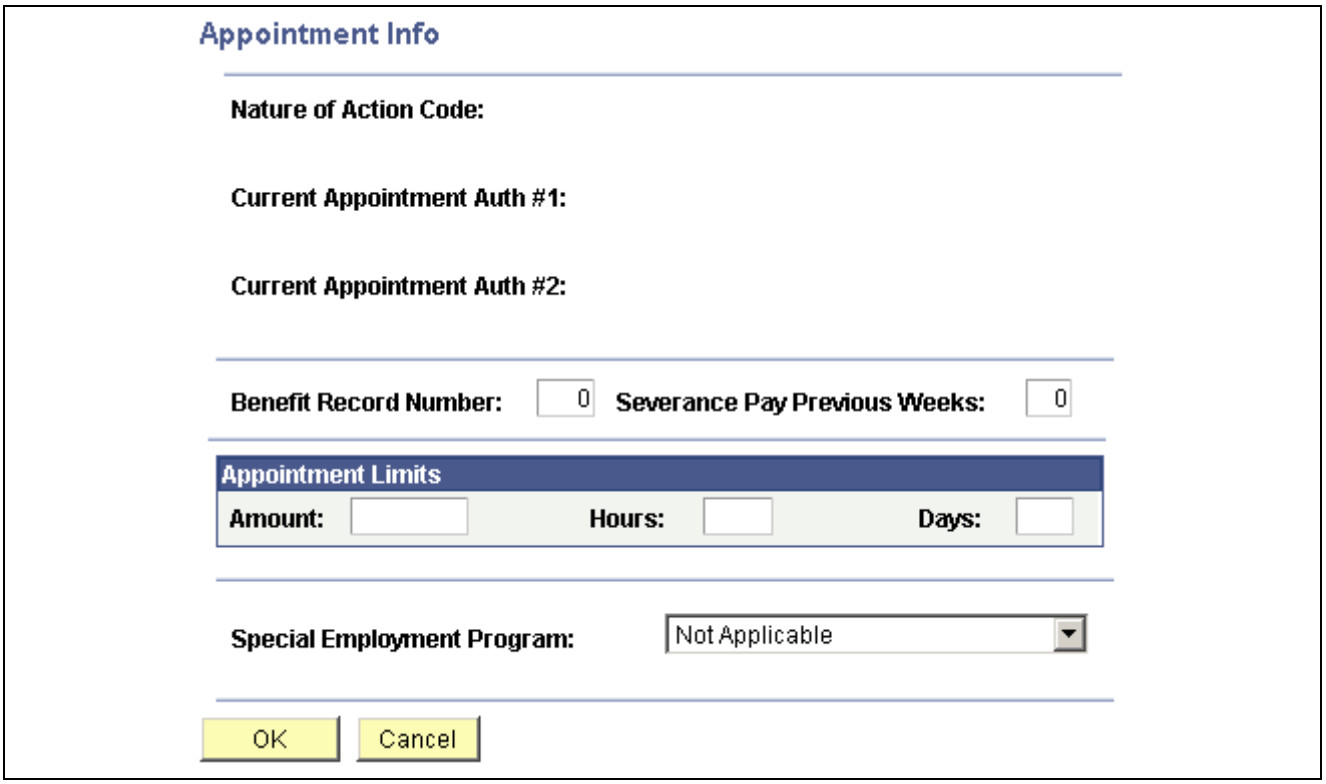
Temporary Position Change Enter the temporary position change expiration date.

Sabbatical Enter the sabbatical expiration date.

Detail Enter the detail assignment expiration date.

Entering Appointment Limits

Access the Appointment Info page.



Appointment Info page

Nature of Action Code, Current Appointment Auth #1 (current appointment authorize #1), and **Current Appointment Auth #2** (current appointment authorize #2)

CPDF reportable fields maintained to reflect historic data on the employee's current appointment authority used to authorize the employee's hire.

Benefit Record Number and **Severance Pay Previous Weeks**

For a new hire, you do not need to enter the benefit record number and the number of severance pay previous weeks. If changes occur to the employee's employment status, you must update these fields (for example, RIF).

Special Employment Program

Indicate the special employment program: *Not Applicable, Other, Presidential Management Intern, SES Candidate Development,* or *Veteran's Readjustment Program.*

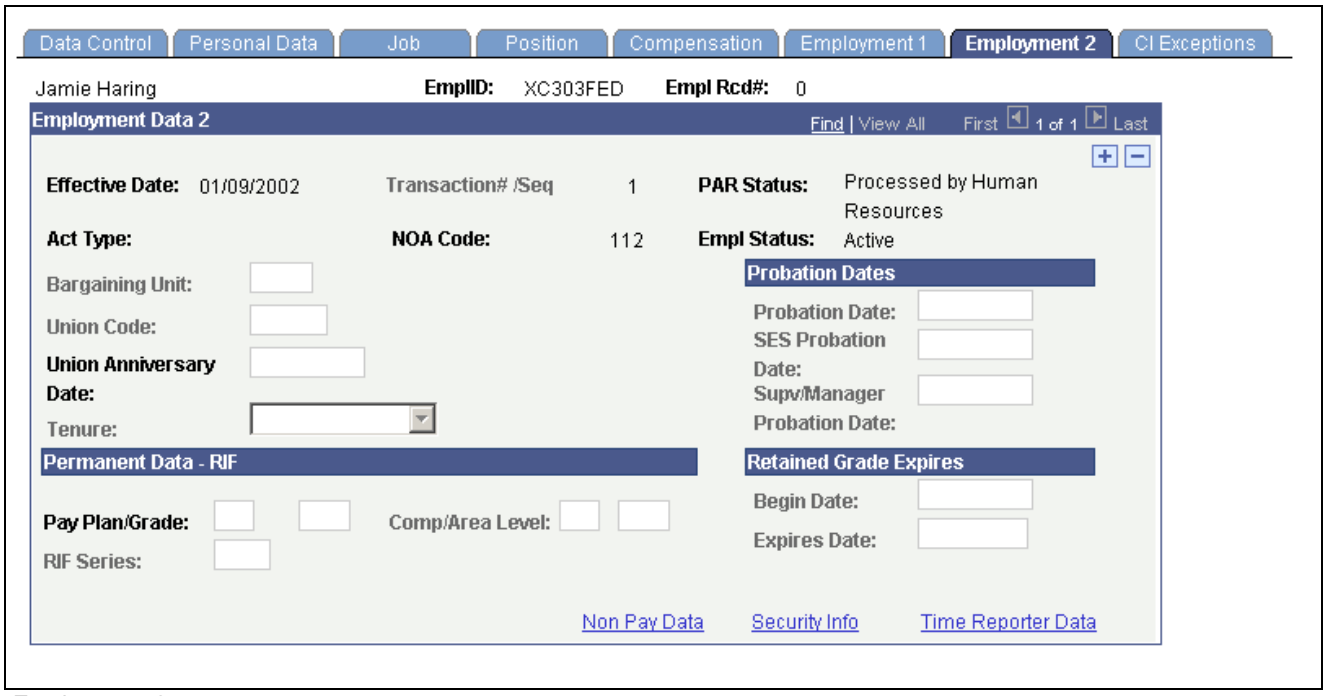
Appointment Limits

Amount, Hours, and **Days**

Depending on the type of appointment used to hire the employee, enter the appointment limits amount, hours, or days.

Entering Additional Employment Information

Access the Employment 2 page.



Employment 2 page

Bargaining Unit Select a code representing the bargaining unit to which the employee belongs.

Union Code If your new employee belongs to a union, select the appropriate union code.

Union Anniversary Date If the bargaining unit covers the position and the employee has elected to join, enter the date on which the employee's seniority ranking within the union is based.

Tenure Indicate the type of tenure.

Probation Dates

Probation Date, SES Probation Date (Senior Executive Service probation date), and **Supv/Manager Probation Date** (supervisor/manager probation date) Enter the applicable probation date, probation, or supervisor/manager probation date. There are different time frames associated with each probation date based on different regulatory requirements.

Retained Grade Expires

Begin Date and **Expires Date** Where appropriate, enter the employee's retained grade begin date and expires date. These are informational fields provided for the agency to track the employee's eligibility to maintain retained grade.

Permanent Data-RIF

These informational fields enable the agency to track the employee relative to RIF processing.

Pay Plan/Grade Enter the employee's pay plan and pay grade.

Comp/Area Level	Enter the employee's compensation area and level.
RIF Series	Select the employee's RIF series.

Links

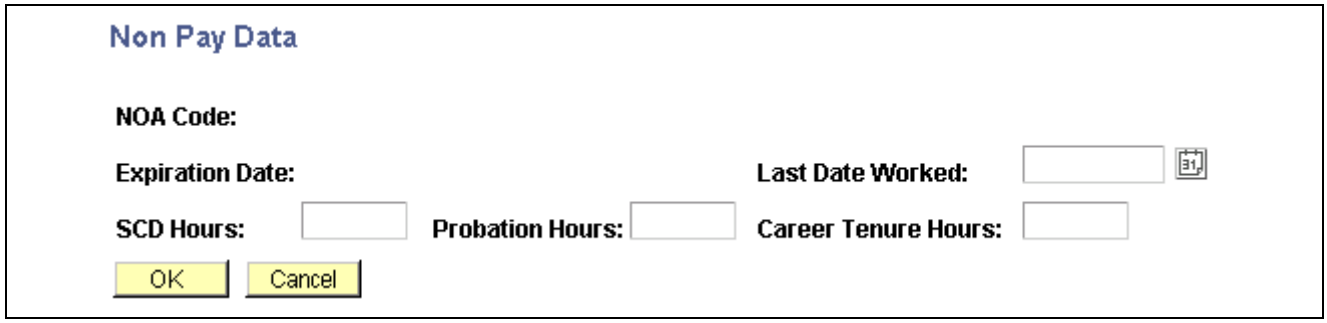
Non Pay Data	Click to access the Non Pay Data page and enter information related to a status of non-pay.
Time Reporter Data	Click to review PeopleSoft time and labor data for this employee. If you aren't using PeopleSoft Enterprise Time and Labor, the link is unavailable.
Security Info (security information)	Click to access the Security Info page and enter information related to the employee's security clearance and financial disclosure.

See Also

Chapter 17, "(USF) Processing Automatic Actions for Probation, Tenure, and WGIs," page 425

Tracking Nonpay Status Information

Access the Non Pay Data page.

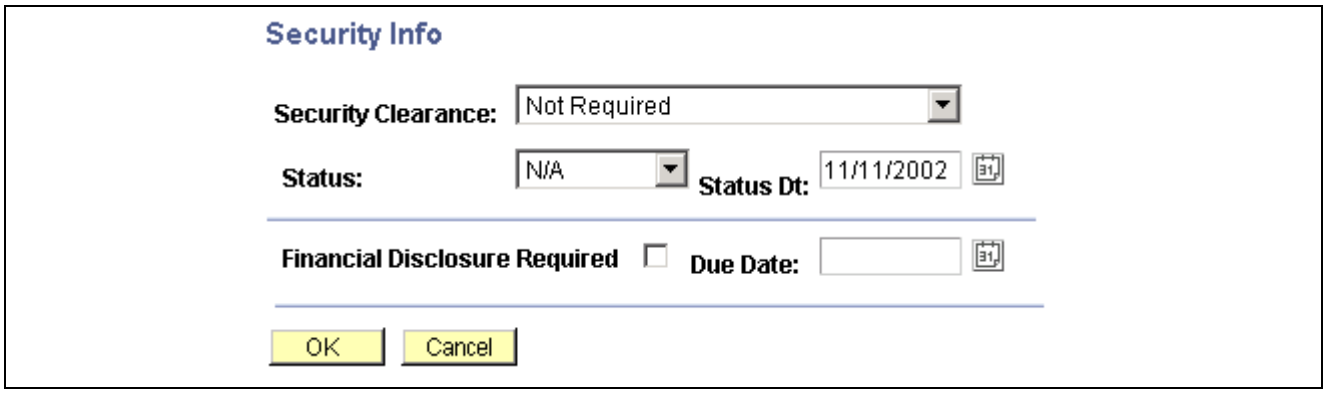


Non Pay Data page

NOA Code	Indicates the PAR processed to place the employee in a nonpay status.
Expiration Date	The nonpay expiration effective date, which reflects the projected expiration of nonpay status and consequent processing of a PAR to return to pay status.
Last Date Worked	Enter the date last worked prior to being placed in a nonpay status.
SCD Hours, Probation Hours, and **Career Tenure Hours**	Enter and track SCD hours, probation hours, and career tenure hours in these informational fields.

Entering Employee Security and Financial Disclosure Information

Access the Security Info page.



Security Info page

Security Clearance — If the employee has received a security clearance, enter the level of security clearance or select *Not Required* to indicate that clearance isn't required.

Status and **Status Dt** (status date) — Enter the status and status date.

Financial Disclosure Required and **Due Date** — If a financial disclosure is required, select this check box, and enter the due date for receipt.

See Also

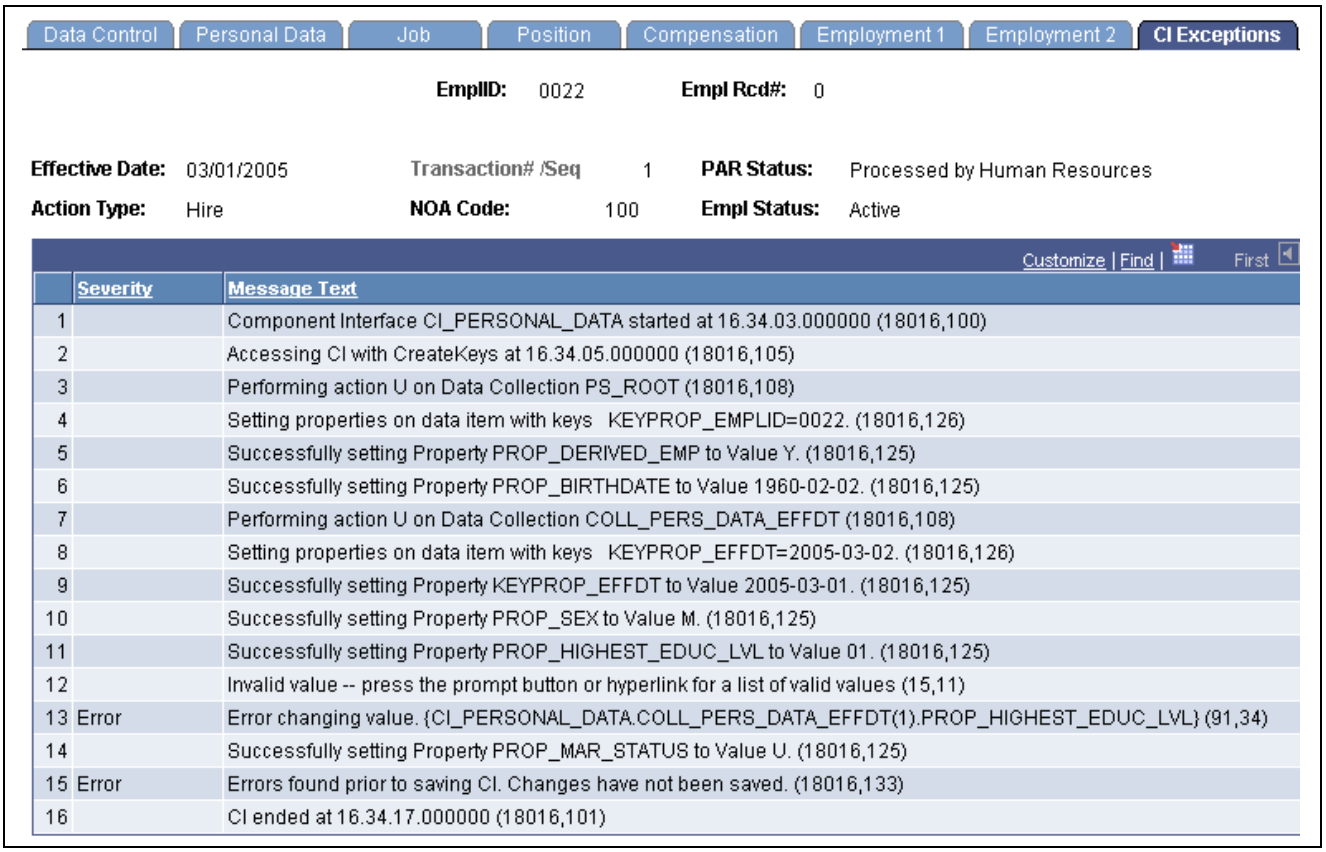
PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions, "Setting Up Positions," (USF) Setting Up Position Titles

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions, "Setting Up Positions," Creating Positions

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up Jobs," Classifying Jobs

Viewing Component Interface Exceptions

Access the CI Exceptions page.



	Severity	Message Text
1		Component Interface CI_PERSONAL_DATA started at 16.34.03.000000 (18016,100)
2		Accessing CI with CreateKeys at 16.34.05.000000 (18016,105)
3		Performing action U on Data Collection PS_ROOT (18016,108)
4		Setting properties on data item with keys KEYPROP_EMPLID=0022. (18016,126)
5		Successfully setting Property PROP_DERIVED_EMP to Value Y. (18016,125)
6		Successfully setting Property PROP_BIRTHDATE to Value 1960-02-02. (18016,125)
7		Performing action U on Data Collection COLL_PERS_DATA_EFFDT (18016,108)
8		Setting properties on data item with keys KEYPROP_EFFDT=2005-03-02. (18016,126)
9		Successfully setting Property KEYPROP_EFFDT to Value 2005-03-01. (18016,125)
10		Successfully setting Property PROP_SEX to Value M. (18016,125)
11		Successfully setting Property PROP_HIGHEST_EDUC_LVL to Value 01. (18016,125)
12		Invalid value -- press the prompt button or hyperlink for a list of valid values (15,11)
13	Error	Error changing value. {CI_PERSONAL_DATA.COLL_PERS_DATA_EFFDT(1).PROP_HIGHEST_EDUC_LVL} (91,34)
14		Successfully setting Property PROP_MAR_STATUS to Value U. (18016,125)
15	Error	Errors found prior to saving CI. Changes have not been saved. (18016,133)
16		CI ended at 16.34.17.000000 (18016,101)

CI Exceptions page

Once you insert your personnel action, set it to Pro for Processed, and click Save, the system will update all the relevant tables with the new data. The system uses a series of Component Interfaces (CIs) to make these updates. Should the CIs encounter an Error, the personnel action update will stop and roll back to the original state and thus no updates will be saved until you address the Error and click Save again.

Should the CIs encounter any warning messages, the update will continue while the warning messages are displayed for you in the CI Exceptions page after the transaction has been successfully saved. These warnings are relevant to the processed transaction and will be automatically deleted once another personnel action is processed. It is good practice to note the warnings and contact your PeopleSoft Technical Administrator to help resolve them. The CI Exceptions page displays an auto-generated step-by-step documentation of what the CIs are executing which provides valuable insight into the back-end technology used in the Federal product.

Entering Education Information

To enter information on the employee's education, use the School Education page.

When you save the Hire component, the system returns the School Education page for you to complete. After you have completed the page, the save process for the Hire component continues.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions, "Managing Position Data," Updating Position Data

Assigning Employees to Positions

If you organizing part or all of PeopleSoft Enterprise Human Resources by position (using PeopleSoft Enterprise Human Resources Manage Positions), you can hire some or all new employees into positions on the Hire Employee pages, accessed from the Workforce Administration, Increase Workforce menu. If you're not using PeopleSoft Enterprise Human Resources Manage Positions, you can also use position numbers but the system won't process position-related data.

Hiring Employees into Positions

When you assign an employee to a position, many fields on the Hire pages are set by default from the Add/Update Position Info component (Organization Development, Position Management, Maintain Positions/Budgets, Add/Update Position Info).

To take advantage of this feature when hiring employees into positions, follow these steps:

1. Select a hire action on the Data Control page.
2. Select a position number on the Job page before entering values in other fields on this page.

   You define positions and assign position numbers in the Add/Update Position Info component.
3. When you move out of the Position field on the Job page, the system completes the position-related fields with default data from the Add/Update Position Info component.

   These fields include Job Code, Agency, Sub-agency, Department, and Location, which are unavailable for entry. The system completes the Effective Date field using data from the Data Control page.

   PeopleSoft Enterprise Human Resources issues a warning message if you assign an employee to a position that has already been filled by another employee and if a new employee appointment exceeds the maximum head count for that position. The system calculates the current head count and shows the appropriate indicator for open/filled on the Position Data – Description (POSITION_DATA1) page. The system does this when you change employee assignments.
4. Enter exceptions to default position data for this employee by selecting the Position Override check box.

   You may need to enter exceptions to the default position data for this employee. For example, the employee may be located in a different location than the standard location associated with the position. Selecting the Position Override check box causes fields previously unavailable for entry, including the Job Code, Agency, Location, and Department fields, to become available. You can then enter exceptions in these fields.

   Note. If you override the defaults for position-related data, you must maintain the employee data manually. The system won't update position data automatically again until you clear the Position Override check box.

When you are hiring an employee, the Position Management Record field is unavailable. The system uses this field to indicate that it has automatically inserted a data row in the Job Data pages due to changes you've made to fields in the Add/Update Position Info component that overlap with fields here.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions, "Setting Up Positions"

Hiring Job Applicants

Use the Recruit Workforce business process to track information about people who apply for jobs with your organization. This business process includes a component called Hire (Recruiting, Hire Applicants, Hire USF) that is designed especially for hiring job applicants. When you use this component to hire an applicant, the information you've already entered in the system automatically becomes part of the employee's record.

This component assigns employee IDs to applicants in a slightly different way from new hires. All other fields on these pages are documented earlier in this chapter.

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

Adding Concurrent Jobs

If your organization allows employees to hold more than one job, use the Concurrent Hire component to enter new jobs for employees who already have one or more jobs. The component consists of the Data Control, Job, Position, Compensation, Employment 1, and Employment 2 pages.

If an employee has more than one job, you may want to designate one job as primary and others as secondary. The primary job designation is used for government reporting.

See Also

Chapter 4, "Adding a Person in PeopleSoft Human Resources," page 55

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Working with Groups"

Prerequisites

Before you can add multiple jobs for your workforce, you must:

- Select the Multiple Jobs Allowed check box in PeopleTools.
- Update user security so that users have access to the menu options they'll need.

Printing Appointment Affidavits and Preliminary Employment Data Forms

This section lists the pages used to run the Appointment Affidavits (FGSF61) and Request for Prel Employ Data (request for preliminary employment data) (FGSF755) reports.

Pages Used to Print the Forms

Page Name	Object Name	Navigation	Usage
SF61 Report	RUNCTL_FGSF61	Workforce Administration, Job Information, Reports, Appointment Affidavits USF	Produces an Appointment Affidavit STANDARD FORM 61 form to be signed by an appointee.
SF-75 Run Control	RUN_CNTL_FGSF75	Workforce Administration, Job Information, Reports, Request Prelim Empl Data USF	Produces a Request for Preliminary Employment Data form.

CHAPTER 7

Entering Additional Data in Human Resources Records

This chapter provides an overview of additional worker data and discusses how to:

- Locate personnel records.
- Set up and track workforce contracts.
- Enter temporary assignments.
- Track disabilities.
- Handle company credit cards.
- Handle company property.
- Track dependent and beneficiary data.
- Track emergency contacts.
- Manage citizenship and visa or permit information.
- Manage driver's license information.
- Enter bank account information.
- Track volunteer activity.
- Enter and track additional workforce data.

Understanding Additional Worker Data

After you've entered a worker's basic personal information and created one or more organizational instances for them, use other pages in the Workforce Administration menu to add and track a broad range of other information for that person.

While many of the pages covered in this chapter are optional, you may find them useful for tracking and reporting, and for maintaining compliance with government regulations. You can also provide other people, such as your employees or industrial relations representatives, with information that helps them perform their jobs more effectively.

Locating Personnel Records

When you open an additional information page, the system displays the dialog box for you to select the person. If you don't know the person's employee ID, there are alternate ways to locate the person's record:

- Use the search dialog box to search for the correct record by name or partial last name.

  Advanced search options may also be available.
- Use the Search for People page to search for a person ID by name, address, city, date of birth, gender, or national ID.
- Use the Search by National ID page to find a person's person ID by using a national ID.

  After you have the person's employee ID, enter it in the dialog box for the page you are accessing.

This section discusses how to:

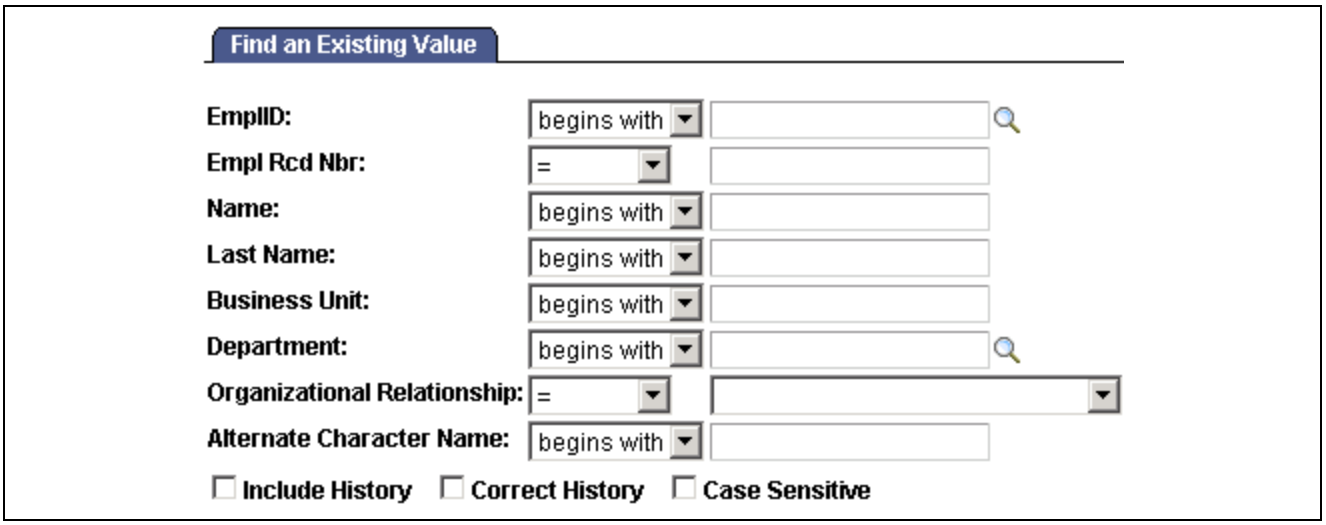
- Search with the search dialogue.
- Search for person information.
- Search by national ID.

Page Used to Locate Personnel Records

Page Name	Object Name	Navigation	Usage
Search for People	HCR_SM_SEARCH	Workforce Administration, Personal Information, Search for People	Search for and select a person.
Search by National ID	NID_LOOKUP	Workforce Administration, Personal Information, Biographical, Search by National ID	Locate a person's employee ID by using the national ID. When you find the person's employee ID, use it when you move to other search pages.

Searching with the Search Dialogue

Use the following search dialog box to find a person's information. You encounter this sort of dialog box when you enter most pages in the Workforce Administration menu. You can also enhance the component's underlying search record to expose other fields as alternate search criteria or as list box items. These fields may include relevant additional fields such as: alternate character name, department, setID, organizational relationship, POI type, and so on.



Enhanced search dialogue

You must have already created job records in PeopleSoft Enterprise Human Resources for the person for whom you are searching. In other words, you must have already added the person to the system and created an organizational instance for the person.

Empl Rcd Nbr — If the person has more than one organization instance or job record, enter the record that you want to access.

If you do not know which record you want to access, do not enter a value in this field. The system lists all the job records in the search results, enabling you to select the appropriate one.

Name and **Last Name** — If you're not sure of the entire employee ID or name, make a partial entry in one of these fields and click Search to search for the correct name and ID.

You cannot use this field to search for last names using special characters, such as double-byte Japanese characters.

Organizational Relationship — Select the organizational relationship to narrow your search to *Employees, Contingent Workers,* or *Person of Interest.*

Alternate Character Name — If you selected the Alternate Character option for your user ID on the Primary Permission List Preferences table, you can also search for employee names by using the Alternate Character search feature in PeopleSoft Enterprise Human Resources.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Working with System Data Regulation in HRMS"

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Working with Languages," Working with Double-Byte Characters

Searching for Person Information

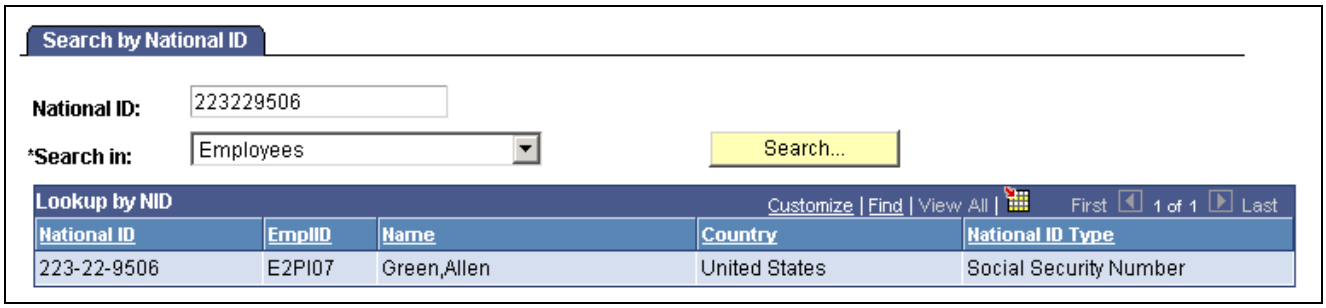
Access the Search for People page.

This page enables users of an application to search for and select a person to process. Using this system, an application can easily render a UI that prompts the user for partial names and displays a list of candidates from which the user can select. Additional features include optional drill-down to additional non-sensitive data.

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring Person Search.

Searching by National ID

Access the Search by National ID page.



Search by National ID page

National ID Enter the national ID of the person whose records you want to view.

Search In Select *Employees* or *Dependents and Beneficiaries* to narrow your search.

Note. *Employees* includes all people who were added to the system on the Personal Information component, including contingent workers and people of interest.

Search Click to have the system display a list of the records that match the ID that you entered.

Setting Up and Tracking Workforce Contracts

To set up workforce contracts, use the Contract Type Table (CONTRACT_TYPE_TBL), Contract Clause Table (CNT_CLAUSE_TABLE), Contract Template Table (CNT_TEMPLATE_TABLE), Contract Status/Content (CONTRACT1), Contract Type/Clauses (CONTRACT2), Original Contract Data (CONTRACT_BEL_SEC), and Signature Date/Probation Info (CONTRACT3) components.

Many organizations maintain contracts or other written agreements with their workforce. The PeopleSoft system enables you to set up standard contracts for your organization.

This section discusses how to:

- Define different types of contracts.
- Add basic contract information.
- Add special contract clause information.
- Add signature date, responsible party, and probation information.
- Generate the Contract Information report.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "(E&G) Administering Contract Pay"

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Labor Administration, "Setting Up Contracts and Unions"

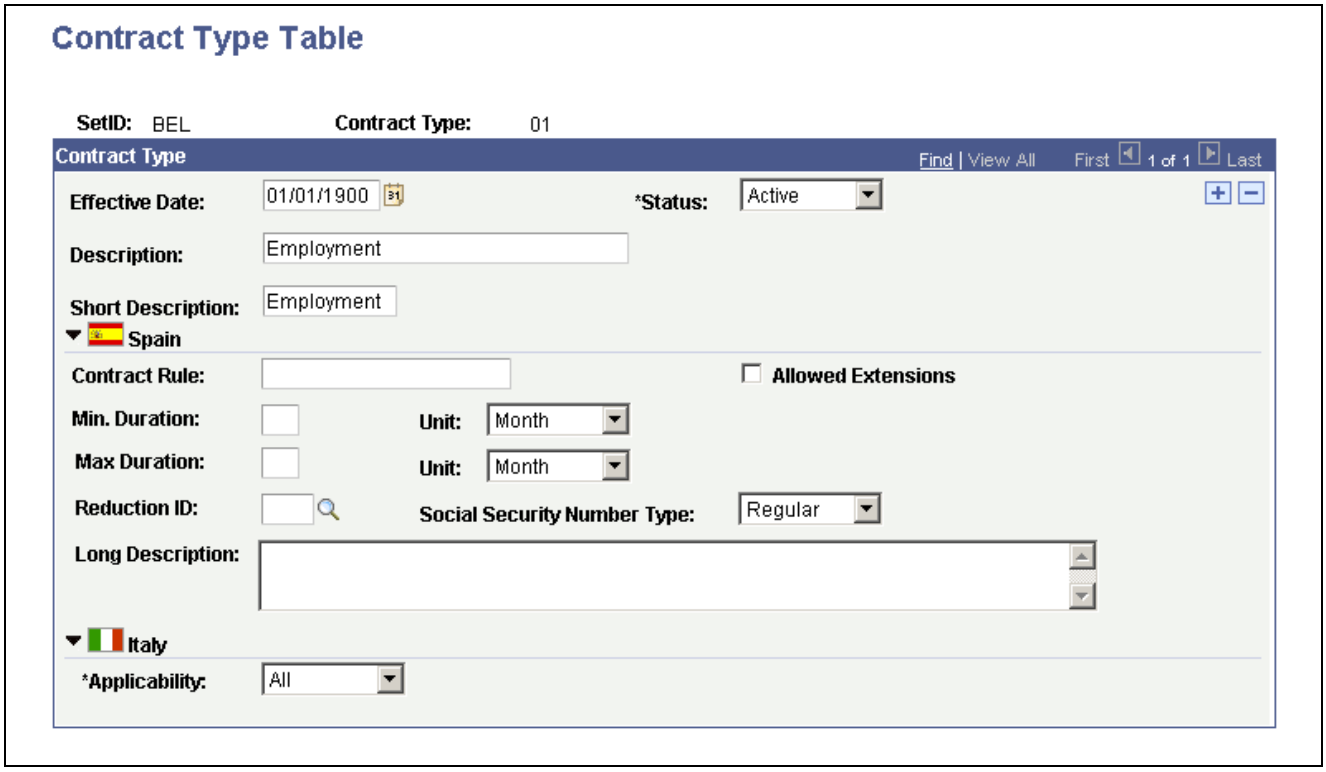
Pages Used to Set Up and Track Employment Contracts

Page Name	Object Name	Navigation	Usage
Contract Type Table	CONTRACT_TYPE_TBL	Workforce Administration, Job Information, Contract Administration, Define Contract Types	Define the different types of contracts that your enterprise administers.
Contract Clause Table	CNT_CLAUSE_TABLE	Workforce Administration, Job Information, Contract Administration, Define Contract Clauses	Define special languages and riders that can be added to the main body of a workforce contract.
Contract Template Table	CNT_TEMPLATE_TABLE	Workforce Administration, Job Information, Contract Administration, Define Contract Templates	Set up all of your organization's standard workforce contracts. Use the information that you define here when you assign contracts to employees and contingent workers in your organization. See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Labor Administration*, "Setting Up Contracts and Unions".
Contract Status/Content	CONTRACT1	Workforce Administration, Job Information, Contract Administration, Update Contracts, Contract Status/Content	Add or update basic information about the contract between your organization and a worker, including the contract duration, type, and content. You must have previously set up contract template IDs on the Contract Template Table page.
Contract Type/Clauses	CONTRACT2	Workforce Administration, Job Information, Contract Administration, Update Contracts, Contract Type/Clauses	Add or update any special contract clause information to the standard contract language for this worker.
Original Contract Data	CONTRACT_BEL_SEC	Click Original Contract on the Contract Type/Clauses page.	Enter information about the original contract that the new contract is replacing.

Page Name	Object Name	Navigation	Usage
Signature Date/Probation Info	CONTRACT3	Workforce Administration, Job Information, Contract Administration, Update Contracts, Signature Date/Probation Info	Add or update the signature date, responsible party, and probation information. View basic job data.
Contract Information	RUNCTL_CNT001	Workforce Administration, Job Information, Contract Administration, Contract Information Report	Generate the Contract Information report (CNT001) that lists all contracts for a worker or the contract history for all workers within a designated period.

Defining Different Types of Contracts

Access the Contract Type Table page.



Contract Type Table page

(ESP) Spain

Contract Rule Enter the number of the law that governs this kind of contract. A typical law number includes the type of law, law number, and year—for example, RD 3290/1997 or Ley 22/1995.

The system doesn't edit your entry.

Allowed Extensions Select to permit extensions to be added to this type of contract.

Min. Duration (minimum duration), **Max Duration** (maximum duration), and **Unit**

Specify the minimum and maximum length that is allowed for this type of contract. Enter a quantity in the Min. Duration and Max Duration fields and use the Unit field to select a unit of time. For example, if the minimum contract duration is six months, enter *6* in the Min. Duration field, then select *Months* from the available options in the Unit field.

Reduction ID

This field is active only if PeopleSoft Enterprise Global Payroll for Spain is installed. Select the reduction ID that corresponds to the contract type. The reduction ID identifies the specific reduction definition or rule that applies to an employer. In certain limited cases—such as when a company hires employees with disabilities, or hires workers older than 45 years of age—the employer may qualify for a reduction in the amount of social security contributions.

Soc. Sec. Nbr. For Employer Type (social security number for employer type)

Select a social security number type from the available options: *none, Part Time, Regular,* and *Training.*

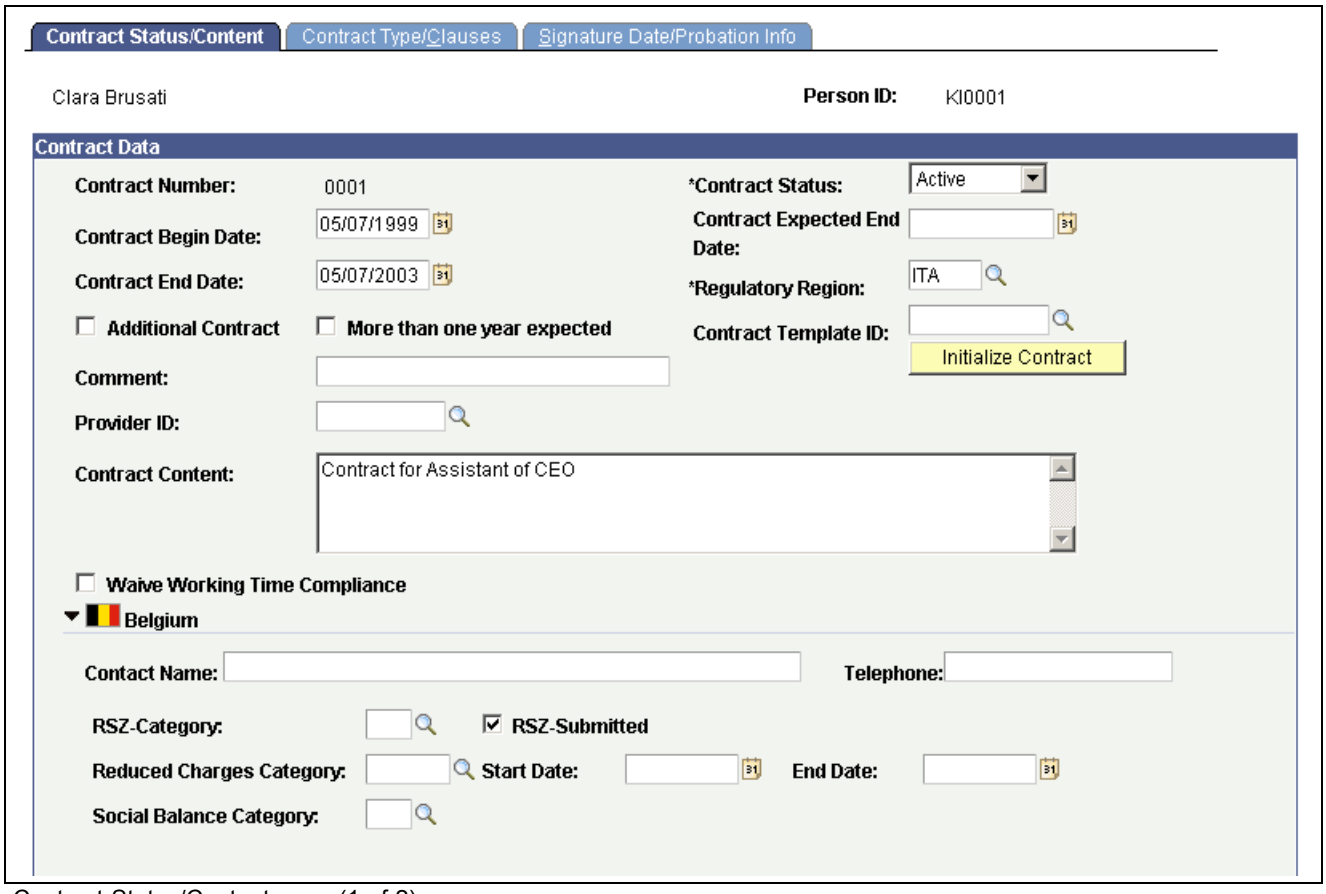
(ITA) Italy

Applicability

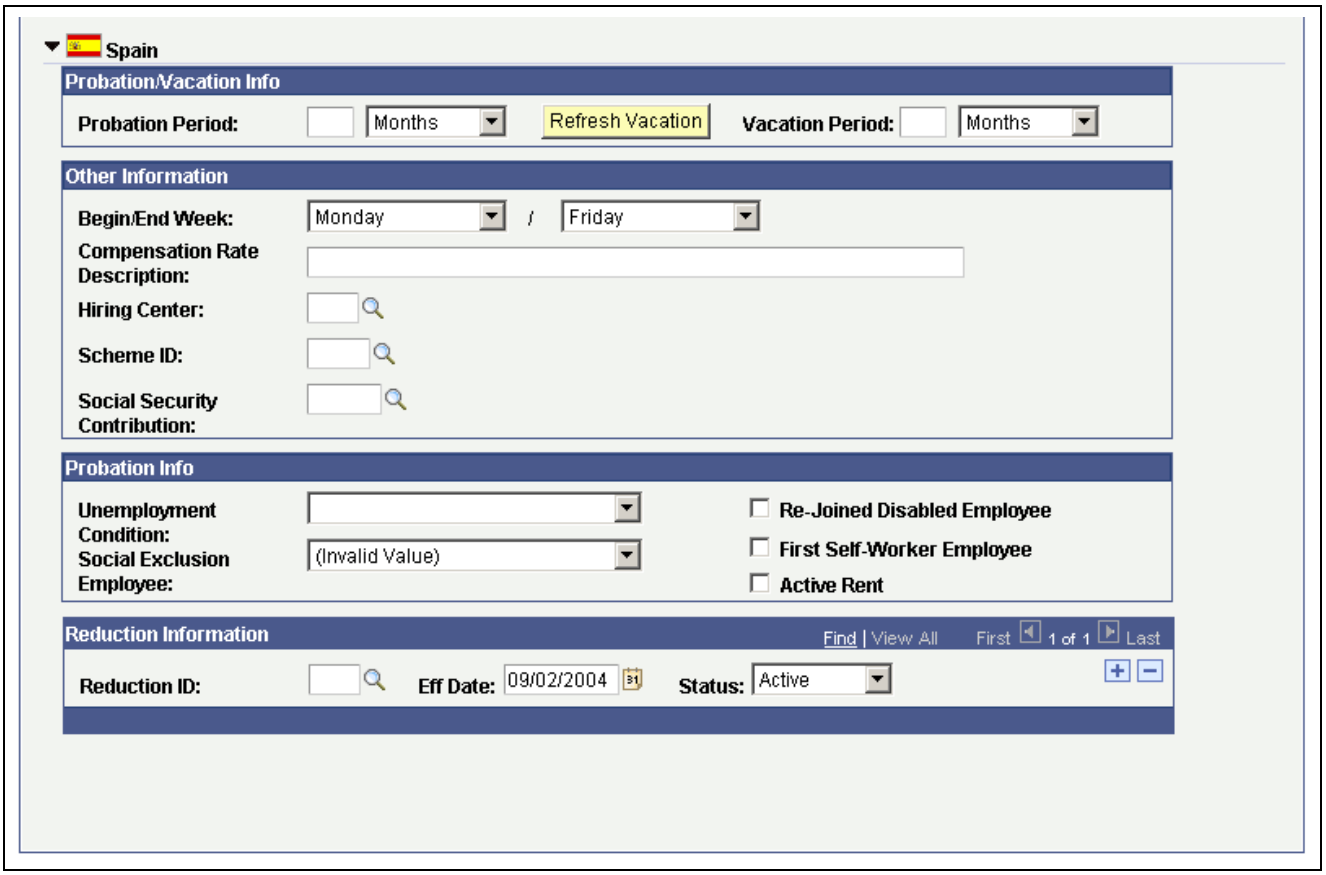
Select whether this contract type is applicable to employees, contingent workers, or both.

Adding Basic Contract Information

Access the Contract Status/Content page.



Contract Status/Content page (1 of 2)



Contract Status/Content page (2 of 2)

Contract Status Indicate whether the contract is *Active* or *Inactive.*

Contract Begin Date Enter the date when the contract begins. The current date is the default.

Contract Expected End Date Enter the date when you expect the contract will end.

Contract End Date Enter the date when the contract actually ended. This date may differ from the date that you expect the contract to end.

Regulatory Region Enter a regulatory region.

Additional Contract Select if the worker already has at least one contract. Leave this field blank if this is the worker's only contract.

More than one year expected Select if you expect that this contract will result in more than one year of employment for this worker.

Note. This field is required for contracts with Japanese workers.

Contract Template ID and **Initialize Contract** If you have defined a template for the contract, select an ID from the list of valid templates stored on the Contract Template Table page, and click Initialize Contract. The system displays a description of the contract and its default contents.

Provider ID If this contract is with a contingent worker, specify the person's provider, agency, or employer.

Contract Content If you entered a contract template code and clicked the Initialize Contract button, the system automatically completes this field with the content that was entered on the Contract Template Table page. Otherwise, enter the contract language.

Waive Working Time Compliance Select if the contract allows working time compliance to be waived by the worker.

(BEL) Belgium

RSZ-Category If you're entering a contract and you selected *Employment* as the contract type on the Contract Type / Clauses page, choose an RSZ category from the valid RSZ category codes stored on the RSZ Category Table page (CNT_RSZ_TBL_BEL).

RSZ-Submitted Select to indicate that social insurance premiums need to be paid by the worker to the Belgian RSZ governing body for this job contract.

Reduced Charges Category Select from among the categories, if appropriate.

Employers can lower their RSZ premium contributions if they are offering a job for one of the two reduced charges categories. Companies that employ workers who qualify for the reduced charges category enjoy lower employee costs.

Social Balance Category Select the appropriate social balance category. This information is included on the BEL Social report.

(ESP) Spain

Probation Period If this worker's contract includes a probation period, use these two fields to specify how long it is. Use the first field to enter the appropriate quantity and the second field to select a unit of time. Units of time are *none, Days, Months,* or *Years.* For example, if the probation period is six months, enter *6* in the first field, and then select *Months* in the second field.

Refresh Vacation Click to enter the default value for vacation periods from the Labor Agreement page in the Vacation Period field.

Vacation Period Use these two fields to specify how much vacation the worker receives per year. Use the first field to enter the appropriate quantity and the second field to select a unit of time. Units of time are *none, Months, Natrl Days* (natural days), *Weeks,* or *Work Days.* For example, if the vacation period is 20 work days, enter *20* in the first field, and then select *Work Days* from the options in the second field.

Begin/End Week Specify the days when the worker's work week begins and ends. The default values are *Monday* and *Friday.*

Compensation Rate Description Enter a free-form description of the worker's compensation rate.

Hiring Center Select the hiring center that is responsible for hiring this person.

Scheme ID Select a scheme ID.

Social Security Contribution Select a social security contribution ID for the selected contract and scheme ID. The system uses both the scheme ID and the contribution ID for social

	security calculations, to determine the percentage or fixed amount that is applied to the calculation of a worker's contribution.
Unemployment Condition and **Social Exclusion Employee**	The AFI report contains this information.
Re-Joined Disabled Employee, First Self-Worker Employee, and **Active Rent**	Select to indicate that the worker has an official certificate and meets the conditions that are required to sign the specific kind of contract. The AFI report contains this information.
Reduction ID	If the worker is entitled to a reduction in social security contributions, select the reduction that applies: • *KE4* is the reduction for workers aged 60 and over with a minimum of 5 years of seniority. • *KE5* is the reduction for workers aged 65 and over with a minimum of 25 years of contributions to social security.

(ESP) Workforce Contracts for Disabled Spanish Workers

If a Spanish employer hires a disabled person, the workforce contract must be in writing. When you hire a disabled person, you must keep the disabled worker for a minimum of three years. The disabled person has the right to work reduced hours for prorated less pay.

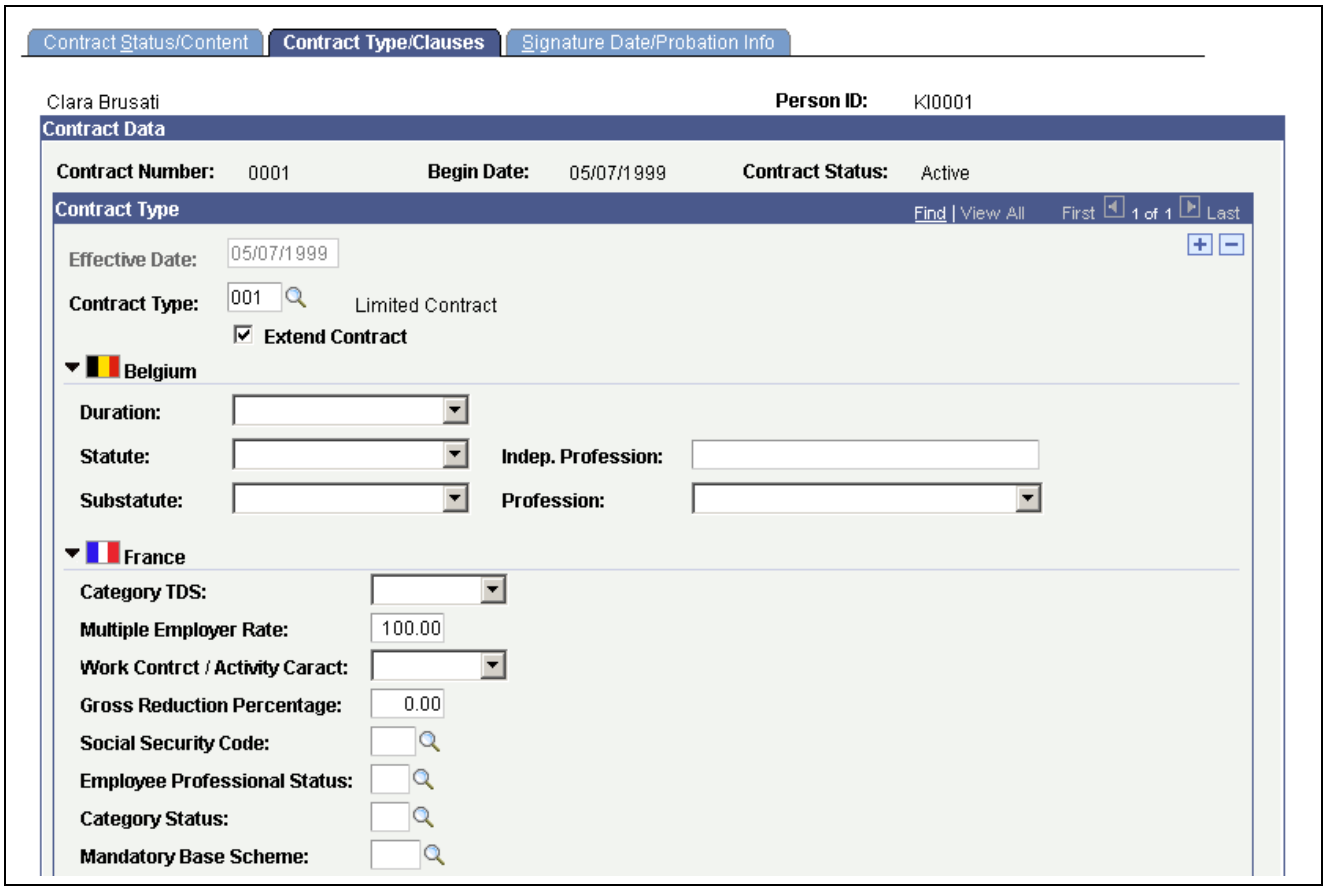
See Also

Chapter 3, "Setting Up Country-Specific Tables," (ESP) Setting Up Spanish Workforce Tables, page 38

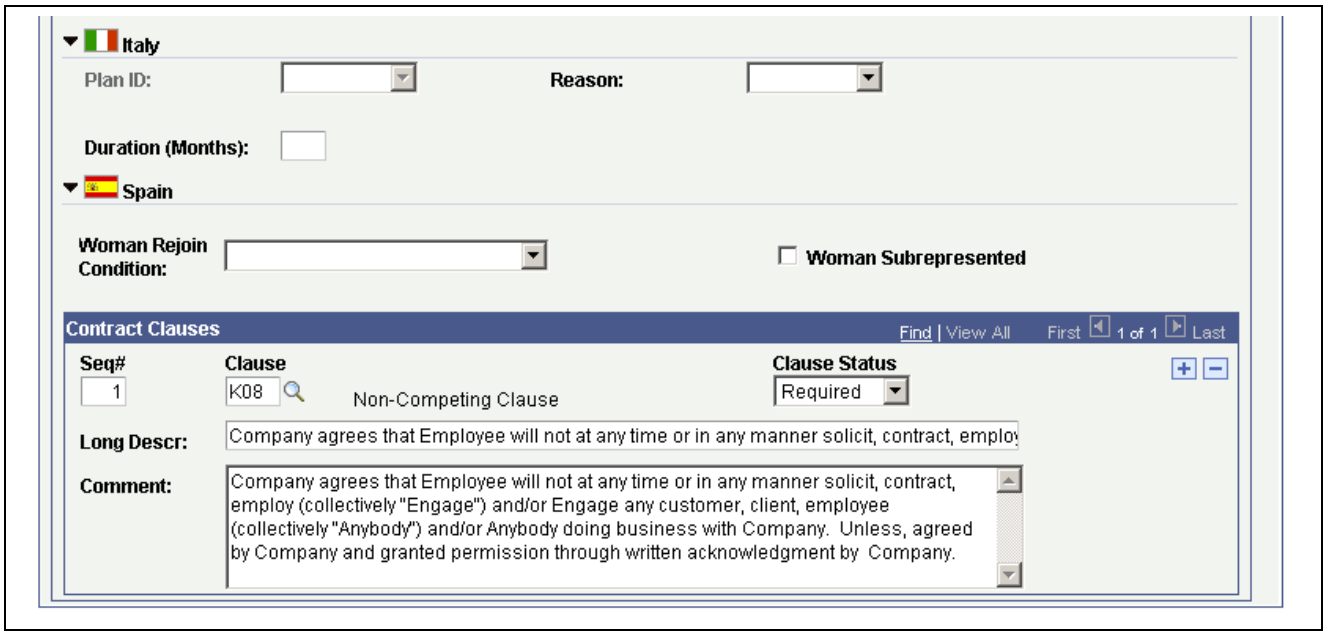
Chapter 3, "Setting Up Country-Specific Tables," Defining Maximum and Minimum Social Security Ceilings, page 41

Adding Special Contract Clause Information

Access the Contract Type/Clauses page.



Contract Type/Clauses page (1 of 2)



Contract Type/Clauses page (2 of 2)

Contract Clauses

Seq# (sequence number) When you add a clause to the contract, the system assigns a sequence number automatically.

Clause Select a clause.

Clause Status The status that is associated with the clause that you selected appears by default.

(BEL) Belgium

Duration Select a duration period for the workforce contract.

Original Contract If *Replacement* defines the duration period, the Original Contract link appears. Click to access the Contract Replacement page to enter the employee ID and original contract number.

Statute Select a contract statute, or employment category, for this worker.

Indep. Profession (independent profession) If you selected *Self employed* as the contract type, provide the worker's independent profession here.

Substatute Select a substatute, or employment subcategory. The system displays only those substatutes that are associated with the statute code that you selected.

Profession If you selected *Member of the Professions* as the contract type, indicate additional profession information here.

(FRA) France

Any worker who is eligible for an URSSAF contribution must be associated with a contribution class code (social security code or regime).

Category TDS Select a worker category: *Apprentice, Executive,* and *Manager.* This field is used to prepare the DADS TDS report.

Multiple Employer Rate Some contracts reduce the earnings ceilings for some contributions (for example, URSSAF). The reduction appears here as a percentage.

If a worker has more than one employer, use the multiple employer rate to indicate the percentage of contributions that should be taken from each employer to avoid over-taxing. The earnings ceilings are prorated using this rate. For example, suppose that a worker has two employers, and he receives 40 percent of his salary from employer A and 60 percent of his salary from employer B. In the Multiple Employer Rate field, employer A enters *40* and employer B enters *60.*

Work Contract/Activity Caract Used to prepare the DADS TDS report. Values are *Full Time, Home, Intermitt., Part Time, Seasonal W, Temporary,* and *Wo Ctc Cpl.*

Gross Reduction Percentage The gross reduction percentage is applied to the gross salary for specific job categories, such as for journalists and artists. These workers do not pay their contributions on their gross salaries. Instead, their gross salaries are reduced by the percentage indicated here. For example, suppose that a worker is entitled to a 30 percent reduction. If he has a salary of 10000 FRF, he contributes for only 7000 FRF. This field has a default value of *0.*

Social Security Code Select a social security code. The social security code is the contribution class, or régime, of the worker. Any worker who is eligible for a contribution must be associated with a social security code.

Employee Professional Status Select the profession that is designated for this worker.

Category Status Select the category status.

Mandatory Base Scheme Select the base compensation scheme for this workforce contract.

(ITA) Italy

Plan ID If the worker was assigned a contract type of *Training and Labor,* you must select a plan ID.

Reason If the worker was assigned a contract type of *001: Limited Contract,* you must enter a reason for the contract.

Empl ID Replaced If the reason for the determined period contract type is *Maternity* or *Replacement,* select the employee ID of the worker who is being temporarily replaced by this contract worker.

The following fields appear in the Target Categorization group box only if the contract type is *Training and Labor*.

Labor Agreement Select the labor agreement for this contract and plan ID.

Category Select the labor category for this contract.

Subcategory Select the subcategory for this contract.

Subcategory 2 If the subcategory selected above has further divisions, select the subcategory 2 here.

(ESP) Spain

Woman Hired 24 months after M. (woman hired 24 months after maternity) Select to indicate that the worker is a woman hired after 24 months of maternity leave. The AFI report contains this information.

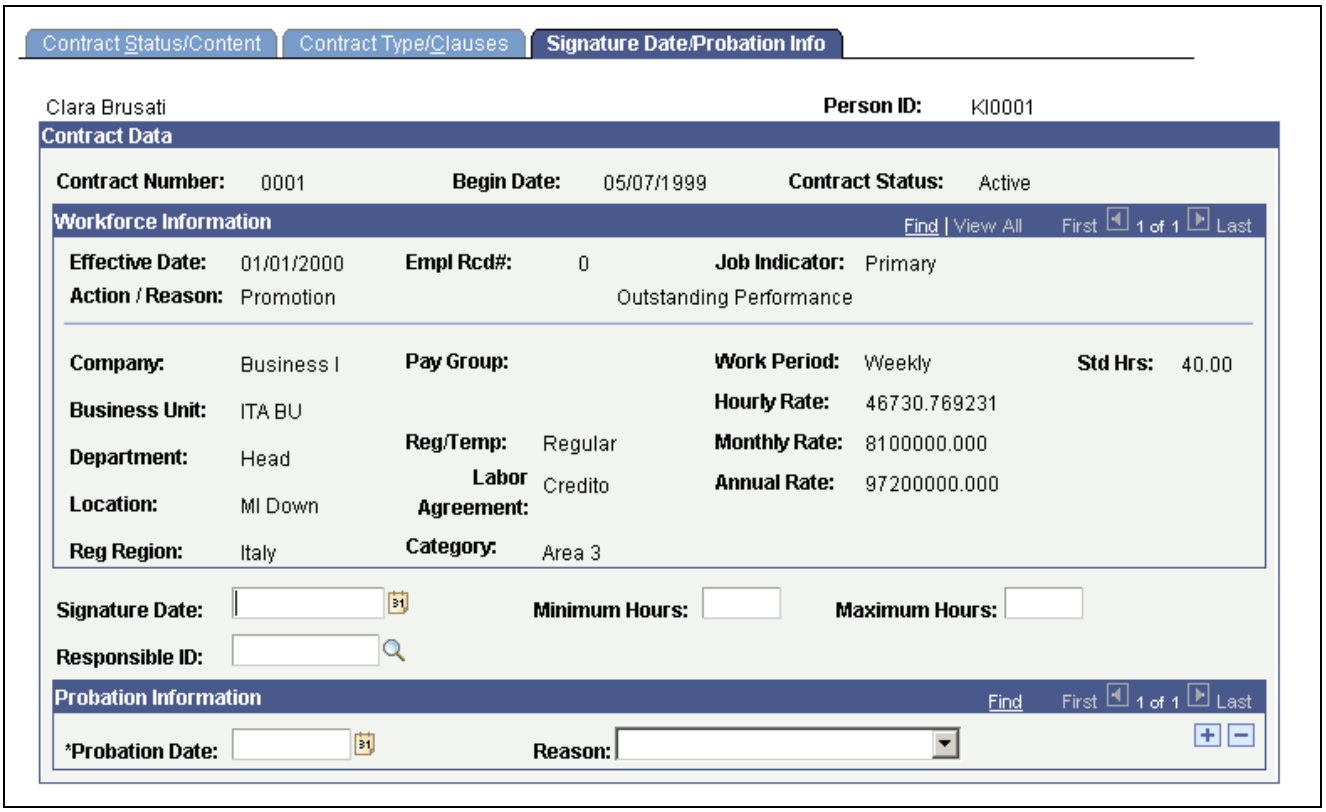
Woman Subrepresented Select to indicate that the worker is a woman hired in a company or sector where women are underrepresented.

See Also

Chapter 8, "(BEL) Entering Additional Data for Belgian Workers," Setting Up Belgian Employment Contract Statutes for Claeys Calculations, page 246

Adding Signature Date, Responsible Party, and Probation Information

Access the Contract Data - Signature Date/Probation Info page.



Contract Data - Signature Date/Probation Info page

The display-only data at the top of this page is derived from the Job Data component.

Signature Date Enter the contract's signature date. This information is required in some European countries, including Germany.

Responsible ID Enter the company agent who drafted the contract and who is responsible for its language.

Minimum Hours and **Maximum Hours** The system supplies default values from the Installation table for this contract.

Probation Date Enter multiple probation dates if they are required for this worker.

The probation date that you enter here also appears on the job data record for this worker.

Reason Indicate a probation reason, including *New Date* and *Un-perform* (indicating additional probation time for failure to perform within expectations for the position).

Generating the Contract Information Report

Access the Contract Information run control page.

EmplID Enter the employee ID of the worker for whom you want to list contracts. If you leave this field blank, the report prints the contract history (within the date range that you specify) for all workers.

From Date and **End Date** Enter the date range for which you want contract information.

Entering Temporary Assignments

This section provides an overview of temporary assignments and substantive jobs and discusses how to:

- Enter a temporary assignment.
- Run the temporary assignment termination and substantive job reactivation process.
- Add a partial temporary assignment.

Understanding Temporary Assignments and Substantive Jobs

This section discusses:

- Substantive jobs.
- Temporary assignments.
- Data row impacts.
- Additional considerations for temporary assignments and data processing.

Substantive Jobs

The substantive job assignment is the worker's original job, created when the first employment or contingent worker instance was added.

Temporary Assignments

When a worker covers the responsibilities of another job besides the substantive job, the worker works a temporary assignment. Temporary assignment data must be tracked the same way that substantive job data is tracked.

For example, a person hired into a teaching appointment takes this as the substantive job. The person then receives a one month temporary assignment as a department head. The original teaching position is suspended for the duration of the temporary assignment.

It is also possible that the person takes a temporary assignment on a partial basis. The person might retain the substantive teaching position for twenty hours a week while also working the temporary assignment as department head for the other twenty hours. The person cannot work beyond the forty-hour workweek, but any combination of assignments might be entered to fill the forty hours.

Data Row Impacts

The Temporary Assignments feature requires that the system insert data rows at various stages throughout the process. For example, when selecting *Temporary Assignment* as the action or reason, the system inserts a second data row that puts the substantive job on hold. When a data row has been inserted by the system, the word *system* appears next to the employment record number (ERN) when viewed later. These data rows show an action or reason of *SUB* (hold substantive job), *RFA* (return from temporary assignment), or *RTS* (return to substantive job).

The substantive job retains its ERN while it is suspended and the temporary assignment is identified by a new ERN. This process enables the system to uniquely identify both job data records and maintain them simultaneously.

Additional Considerations for Temporary Assignments and Data Processing

Review these additional considerations when creating temporary assignments:

- When position data changes, the system updates position data for all workers in the affected position regardless of whether the assignment is temporary or substantive.

  This update does not alter the active or inactive status of the workers in the affected position.

  Similarly, when the substantive position changes, the system does not change the temporary assignments for the worker. The only exception is the unlikely possibility that a worker's temporary and substantive assignments are in the same position.

- The worker's pay rate matches the active assignment.

  If a worker works multiple assignments beyond the substantive job, the system prorates the pay for each assignment. For example, if the employee teaches for twenty hours a week and acts as department head for twenty hours a week, payroll processes each job at 50% of the standard pay. To change the pay rate, you can override the position data manually on the Compensation page.

Note. Use the Job Data component pages for creating temporary assignments.

Pages Used to Process Temporary Assignments

Page Name	Object Name	Navigation	Usage
Reactivate/Termination Update	RC_TEMP_ASSGN_UPDT	Workforce Administration, Job Information, Temporary Assignments, Reactivate/Update Termination	Run the temporary assignment termination and substantive job reactivation process.
Temp Assignment w/out End Date	RUNCTL_TAS001	Workforce Administration, Job Information, Temporary Assignments, Temp Assignmt w/out End Date	Run the Temp Assignment w/out End Date report (TAS001). The report lists workers currently on temporary assignment where end dates have not been defined.
Temp Assignmt Due to Complete	RUNCTL_TAS002	Workforce Administration, Job Information, Temporary Assignments, Temp Assignmt due to Complete	Run the Temp Assignment due to Complete report (TAS002). This report lists workers due to complete temporary assignments within the user specified date range.

See Also

Chapter 2, "Setting Up the Administer Workforce Business Process," Defining Personnel Actions and Reasons, page 5

Entering a Temporary Assignment

Access the Job Data - Work Location page.

To enter a temporary assignment:

1. Locate the substantive job that will be put on hold during the temporary assignment.
2. Insert a new data row with the following parameters:

- Enter the effective date that the temporary assignment begins.
- Enter *Temporary Assignment* in the Action/Reason field.

  When you use this value in the Action/Reason field, the system suspends the worker's substantive job, transferring the substantive job data, including payroll and benefits information, to the next job record for this worker. The Reactivation/Termination process reactivates the substantive job upon termination of the temporary assignment.
- Enter the temporary assignment position number, if applicable.

3. (Optional) On the Job Data − Job Information page, enter the termination date for the temporary assignment in the Planned Exit field.
4. (Optional) Select the End Job Automatically check box to end the job on the termination date.

   This action also reactivates the substantive job when you run the Reactivation/Termination process.
5. Select the type of duties in the Duties Type field for this temporary assignment.

Note. You must enter the planned exit date *and* select the End Job Automatically option for the Reactivation/Termination process to run automatically for each assignment. If you do not complete these fields, the termination of the temporary assignment and reactivation of the substantive job must be handled manually.

Whereas the previous procedure outlines the required actions for entering temporary assignments, you can also make other adjustments, as necessary, on any of the pages in the component. For example, it might be necessary to adjust the pay rate on the Compensation page. You should make this adjustment while creating the temporary assignment. When you save this information, the system suspends the substantive position.

Running the Temporary Assignment Termination and Substantive Job Reactivation Process

Access the Reactivate/Termination Update page.

Complete the Company and Expected Job End Date up to fields and run the Reactivate/Termination Update process (HR_REACTVTER).

This process must be run periodically to terminate temporary assignments (with job end dates) and to reactivate substantive positions. This process inserts new data rows into the job data record. These data rows have reason codes of *SUB* (hold substantive job), *RFA* (return from temporary assignment) and *RTS* (return to substantive job), and the designation *system* next to the employee record number when viewed later.

Adding a Partial Temporary Assignment

You can add a temporary assignment that is fewer than 40 hours per week while maintaining the substantive job that fills the remaining hours. For example, an employee who is assigned to a temporary position that requires only 10 hours a week retains the substantive position for the other 30 hours. In this case, both jobs must remain active.

To allow both jobs to remain active, use the Assign Additional Job component to enter the temporary assignment. You must then adjust the standard hours of the substantive position so that the hours for both jobs—substantive and temporary—equal 40 hours. You can still enter an end date for the temporary assignment and have that job end automatically. However, you must manually readjust the standard hours for the substantive position after the temporary assignment ends.

To replace a substantive job with two or more temporary assignments, choose one of the temporary assignments to replace the substantive job following the same procedure for assigning one temporary job, adjusting the hours appropriately. Then assign the second temporary position as a concurrent job.

If a worker has multiple substantive positions and is assigned one temporary position, the temporary assignment can only be assigned to one of the substantive positions. The other substantive positions must be manually suspended and reactivated using *Hold Substantive Job* and *Return to Substantive Job* as the action or reason.

Note. When assigning any combination of temporary assignments, you can still select the End Job Automatically check box on the Job Information page for the temporary assignment. However, if you have adjusted the standard hours for the substantive position, you must manually set the standard hours to the original setting when the temporary assignment has ended.

See Also

Chapter 5, "Increasing the Workforce," Adding Additional Assignments, page 130

Tracking Disabilities

You can track any disabilities that your workers may have, as well as check your own facilities' accessibility. Administer Workforce includes a number of reports that list disability information.

This section discusses how to:

- Enter disability information.
- Document disability accommodations.
- (ITA) Run the ITA Disability report.

Pages Used to Track Disabilities

Page Name	Object Name	Navigation	Usage
Accommodation Type Table	ACCOM_TYPE_TABLE	• Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Accommodation Type • Workforce Monitoring, Meet Regulatory Rqmts, Define Regulatory Rqmts Data, Accommodation Types, Accommodation Type Table	Define the types of workplace accommodations that your organization makes for disabled workers.
Disability	DISABILITY	Workforce Administration, Personal Information, Disability, Disabilities, Disability	Enter disability information. Indicate if a worker is disabled and record details of the disability.

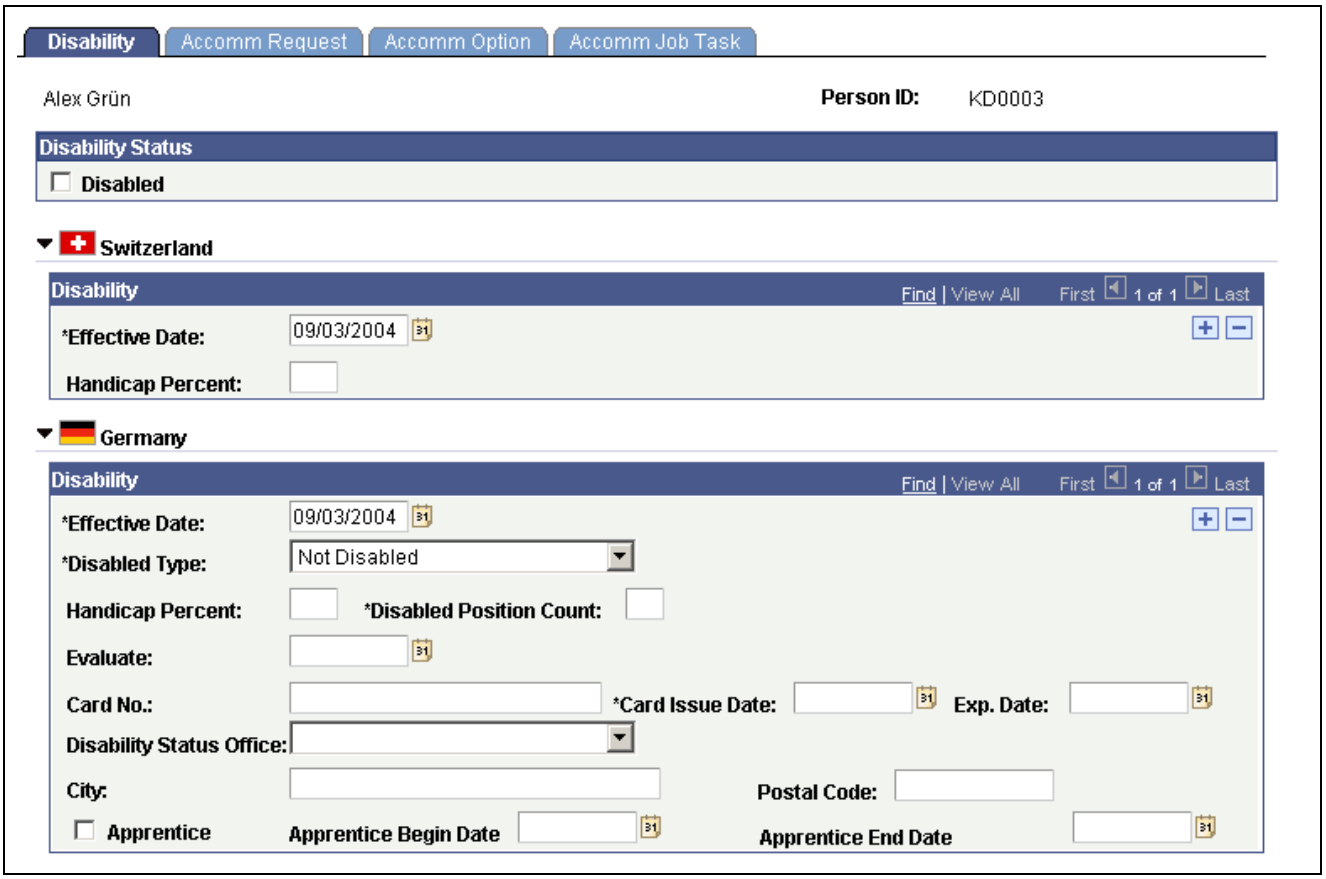
Page Name	Object Name	Navigation	Usage
Accomm Request	ACCOMM_REQUEST	Workforce Administration, Personal Information, Disability, Disabilities, Accomm Request	Enter accommodation requests that a worker or applicant makes of your organization. You can also enter diagnosis codes for worker disabilities.
Accomm Option	ACCOMM_OPTION	Workforce Administration, Personal Information, Disability, Disabilities, Accomm Option	Enter the options that the organization or the person with a disability is considering to resolve each accommodation request.
Accomm Job Task	ACCOMM_JOB_TASK	Workforce Administration, Personal Information, Disability, Disabilities, Accomm Job Task	Enter the job tasks that you are accommodating, classified by job code and, where necessary, by location. If you create essential job tasks in the Job Code Task table, you can enter multiple job tasks for each accommodation.
(DEU) Heavily Disabled	RUNCTL_PER039GR	Workforce Administration, Personal Information, Disability, Heavily Disabled GER	Run the Heavily Disabled report (PER039GR). This report lists heavily disabled workers and additional information about their disabilities.
(DEU) Heavily Disabled Equaliz	RUNCTL_PER040GR	Workforce Administration, Personal Information, Disability, Heavily Disabl Equalizatn GER	Run the Heavily Disabled Equalization report (PER040GR). This report calculates the required number of heavily disabled workers and the equalization amount of money if the required number of heavily disabled workers is not fulfilled.
(ITA) Disability Report	RUNCTL_PER060	Workforce Administration, Personal Information, Disability, Disability Report ITA	Run the Disability Report - ITA (PER060). This run control page runs the Annual, Name List, or Disability Statistics reports.

See Also

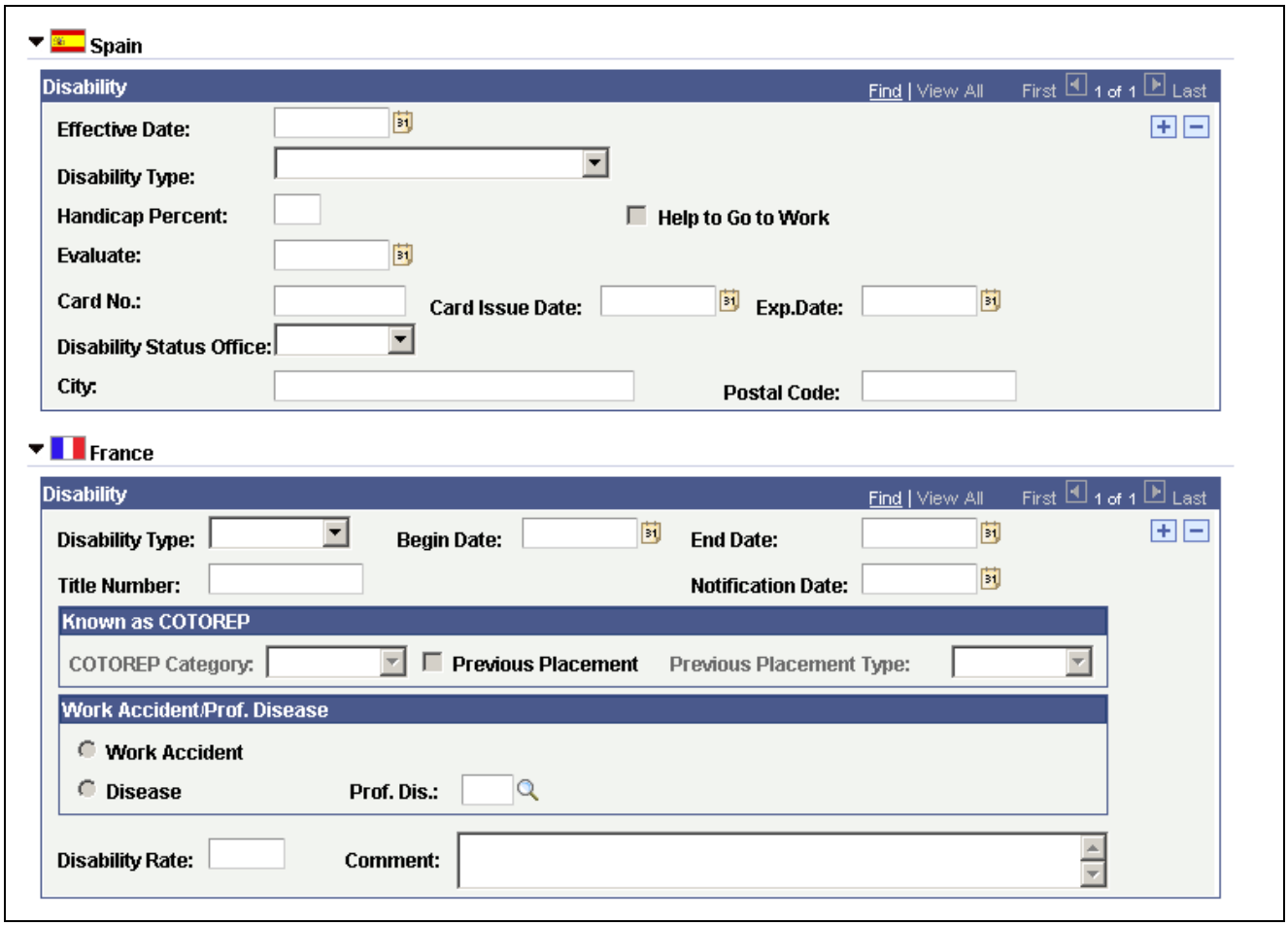
PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements, "(GBR, USA, and USF) Meeting Disability Regulatory Requirements," Managing Accommodation Data

Entering Disability Information

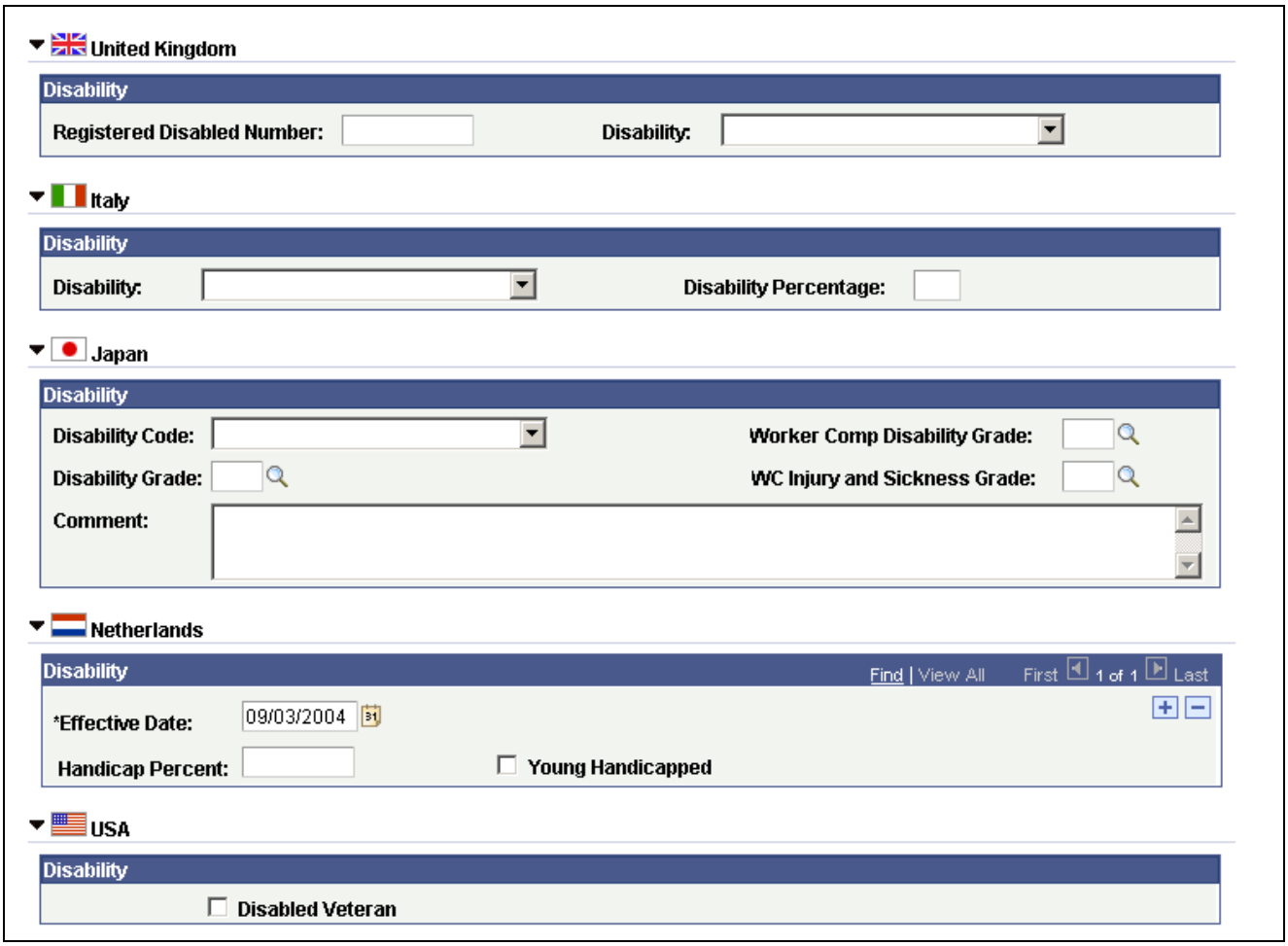
Access the Disability page.



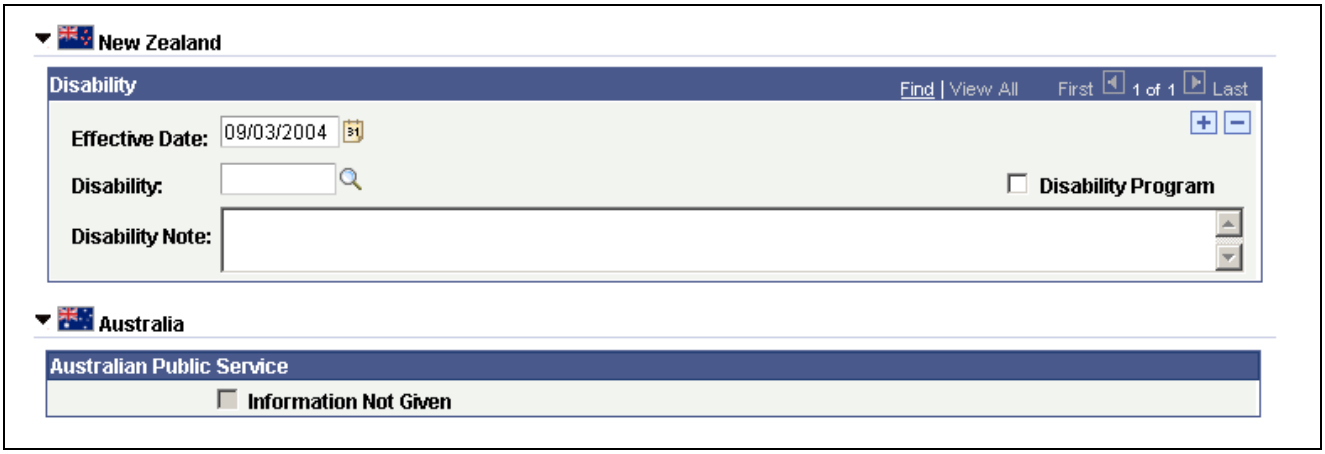
Disability page (1 of 4)



Disability page (2 of 4)



Disability page (3 of 4)



Disability page (4 of 4)

Track information regarding worker disabilities using the Disability component, which consists of the Disability page and the three Accommodation Data pages. Using these pages, record information regarding disabled workers, and the impact on accommodation requirements for your organization. The information can also be used for regulatory reporting and protecting your organization from claims of disability discrimination.

Disabled Select if the worker is disabled.

(CHE) Switzerland

Handicap Percent Enter a percentage of disability from *0* to *100*.

(DEU) Germany

Use this group box to track worker disability information that your company needs to demonstrate compliance with the Handicapped Workers Act of 1961. For your company's purposes, the act defines a handicapped person as someone who is registered as handicapped and who is disabled to the degree that it impacts earning capacity. When registered as handicapped, the individual is issued a disability card, and your company must track the disability card number, who issued the card, the issue date, and the expiration date.

Disabled Type Identify the worker's disability type.

Handicap Percent Enter the degree of the disability.

Disabled Position Count Enter the degree to which this worker's disability can be applied to the total number of positions filled by disabled workers. Not every disabled worker may count as a full disabled position.

Evaluate Enter the date that the person's disability was evaluated or reviewed. The evaluation date can be different from the effective date for the disability entry. To maintain a history of evaluation date records, such as past and future evaluations, insert additional data rows and use the scroll bar to navigate between rows.

Card No. Card Issue Date, and **Exp. Date** (disability card number, card issue date, and card expiration date) Enter the worker's disability card number, card issue date, and card expiration date.

Disability Status Office For each disability card, enter the disability status office that issued the card.

(ESP) Spain

Disability Type Select a disability type:

- *Non Disability* (none)
- *Physical Disability*
- *Psychological Disability*
- *Sensorial Disability*

Handicap Percent Spanish law requires you to track a disabled worker's percentage of disability. Enter a percentage from *0* to *100*.

Help to Go to Work Select if the worker needs physical assistance to go to work. This check box is available only to workers whose disability percentage is between 33% and 65%, and is used to calculate a tax deduction for that worker.

Evaluate Enter the date when the disability was evaluated.

Card No. (card number), **Card Issue Date,** and **Exp. Date** (expiration date) The Spanish government issues to people with disabilities a card that certifies their percentage of disability. Enter the card number, the date when the disability card was issued, and the disability card's expiration date.

Disability Status Office Select the office in charge of monitoring the worker's disability status.

(FRA) France

Use this group box to track worker disability information that your company needs to demonstrate compliance with French regulations regarding disability hiring quotas, and to provide notifications to the disabled worker's social security commission, or *Commission Technique d'Orientation et de Reclassement Professionnel* (COTOREP).

Disability Type Indicate the worker's disability type, which identifies whether the worker is classified by COTOREP as disabled, or instead collects a financial stipend from the social security commission for some other similar reason. These reasons may include widows, orphans, or spouses of a disabled person, and war widows. This information is tracked so that your company can complete the required report of this information in a manner similar to the French Disability report.

Title Number Enter the worker's disability number, assigned by COTOREP.

Begin Date Enter the date that the disability started.

End Date If the disability wasn't permanent, enter the disability end date.

Notification Date Record the date that your company notified the social security commission that you hired the worker.

Disability Rate In the specific case of a disability due to a work accident or a professional disease, the National Social Security Administration (not COTOREP) assigns a percentage of disability to the worker. The purpose of this percentage is to enable a calculation for an allowance that is paid by the National Social Security Administration. A worker can be recognized as a disabled person by COTOREP and also be a victim of a work accident or disease.

When applicable, enter the percentage of disability (*0* to *100* percent).

(FRA) Known as COTOREP

When you open the page, the fields in this group box are display-only. If you select *COTOREP* as the disability type, the fields become available.

COTOREP Category Enter the level of severity of the worker's disability, as defined by the social security commission. Values are:

COTOREP A: Light disability.

COTOREP B: Medium disability.

COTOREP C: Severe disability.

Previous Placement Select to indicate that the worker had a prior disability placement through COTOREP.

Previous Placement Type If the worker had a previous placement, indicate the previous placement type.

(FRA) Work Accident/Prof. Disease

When you first open the page, the fields in this group box are display-only. If you select *WrkAcc/Dis* (work accident/disabled) as the disability type, the fields become available.

Work Accident and **Disease** Select whether the disability is the result of a work accident or a disease.

Prof. Dis. (professional disease) If the disability is the result of a disease, select the type of disease.

(GBR) UK

Use this group box to track disability data for United Kingdom (UK) workers and to demonstrate compliance with the fair hiring and employment provisions of the Disability Discrimination Act of 1995.

Registered Disabled Number Enter the worker's Registered Disabled Number.

Disability Select the worker's disability type.

(ITA) Italy

Disability Select the worker's disability type.

Disability Percentage Enter the worker's disability percentage, as determined by the examining doctor.

(JPN) Japan

Use this group box to track a worker's disability category and grades. This information is used for regulatory and tax reporting purposes.

Disability Code Enter the worker's disability code (values are legal disability categories that are set by the Ministry of Labor): *Disabled, Heavily disabled, Heavy mental disorder,* and *Mental disorder.*

Disability Grade Select a value from *Grade 1* through *Grade 7.*

Worker Comp Disability Grade (workers' compensation disability grade) Select a value from *Grade 1* through *Grade 14.*

WC Injury and Sickness Grade (workers' compensation injury and sickness grade) Select a value from *Grade 1* through *Grade 3.*

(NLD) Netherlands

Use this group box to record disability information for your workforce, and then use this information to document compliance with regulations under the Disabled Employees Act of 1985 (*Wet Arbeid Gehandicapte Werknemers*).

Handicap Percent Enter the percentage degree to which the worker is handicapped.

Young Handicapped Select to indicate that the worker qualifies for the tax reduction rule for young handicapped people (*Wet arbeidsongeschiktheidsvoorziening jonggehandicapten, Wajong*).

(USA) USA

Disabled Veteran Select only if the worker is a disabled veteran.

(NZL) New Zealand

Disability Select the worker's disability type. These values come from the NZL Disability table.

Disability Program Select if there is an association between the worker and a disability program.

Disability Note Enter additional comments about the disability.

(AUS) Australia

Information Not Given Select if worker disability information is not provided.

Documenting Disability Accommodations

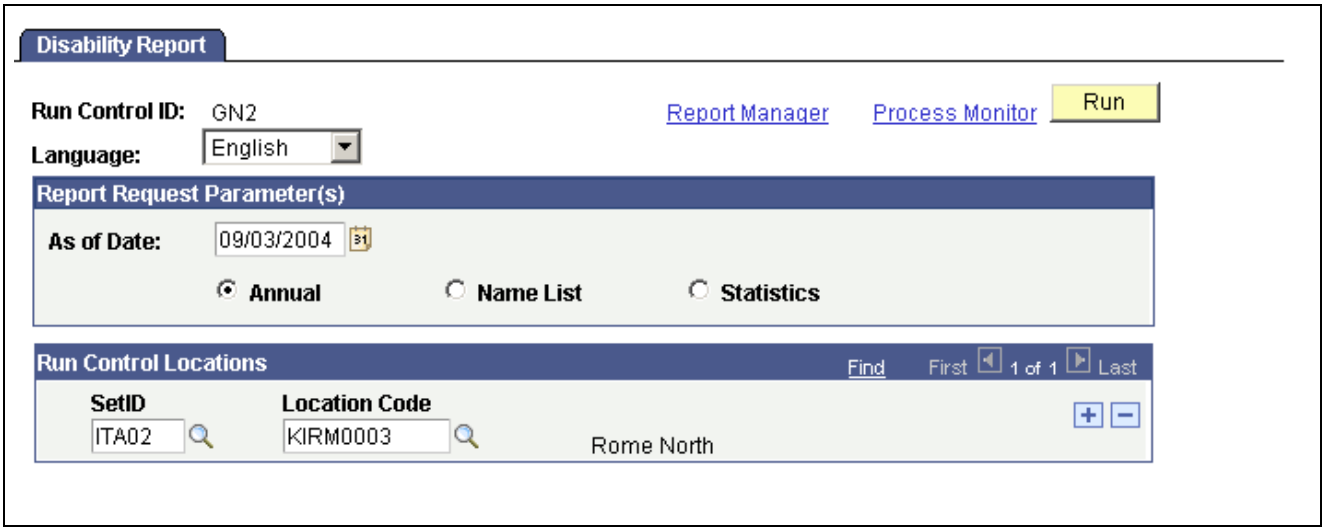
Use the three accommodation data pages—Accomm Request, Accomm Option, and Accomm Job Task—to document that your company doesn't have discriminatory practices against people with disabilities. When workers or applicants request that you make accommodations to enable them to perform job tasks, you can track all the steps that are involved in resolving those requests.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements, "(GBR, USA, and USF) Meeting Disability Regulatory Requirements," Managing Accommodation Data

(ITA) Running the ITA Disability Report

Access the Disability Report page.



Disability Report page

Annual Select this option if you want to run the annual report, which lists the number of disabled workers sorted by disability type and gender.

Name List Select this option if you want to run the report that lists the names of disabled workers by location and gender.

Statistics Select this option if you want to run the report that lists locations and the number of disabled and able-bodied workers. Part and full-time disabled

workers are counted as one. Part-time, able-bodied workers are counted using their full time equivalent (FTE) value. If an able-bodied employee has an FTE value of 0.5, then that employee is counted as 0.5 on this report. Full-time, able-bodied workers are counted as 1.

SetID Select the setID of the company for which you are reporting disability statistics.

Location Code Select the location code of the location for which you are reporting disability statistics.

Handling Company Credit Cards

In PeopleSoft Enterprise Human Resources, you can identify company credit cards and then assign those cards to employees.

This section discusses how to:

1. Enter credit card vendors.
2. Assign cards to workers.

Prerequisite

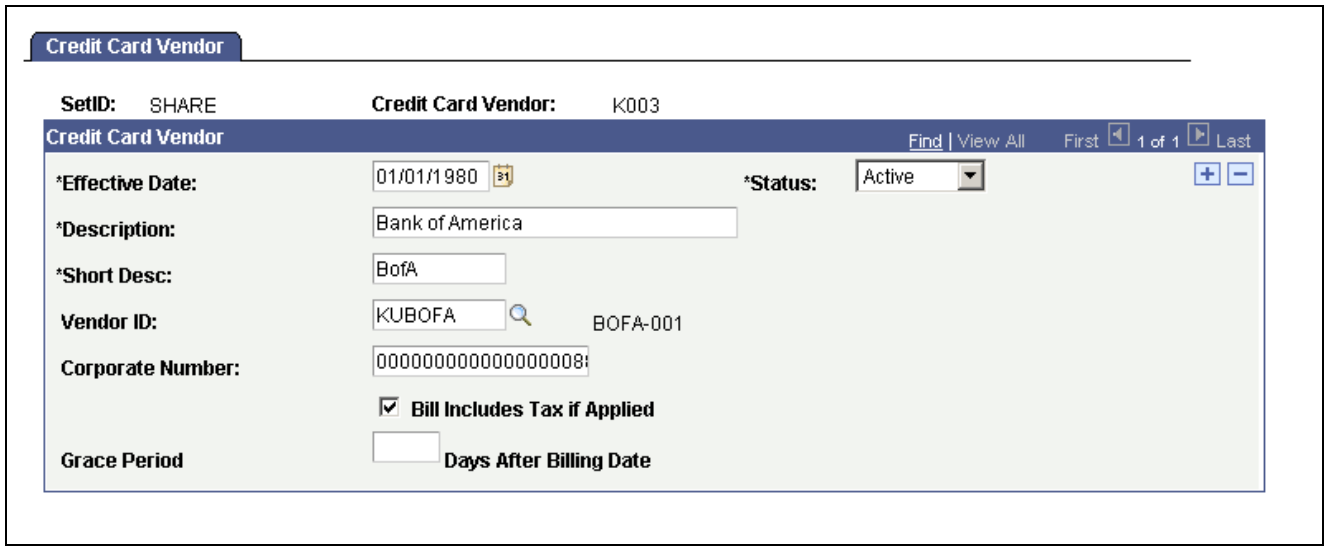
You must have defined credit card types on the Translate table before entering credit card vendors.

Pages Used to Handle Company Credit Cards

Page Name	Object Name	Navigation	Usage
Credit Card Vendor	CC_CARD_TBL	Set Up HRMS, Product Related, Workforce Administration, Credit Card Vendors	Enter vendors of credit cards that you'll assign to workers. A vendor that you identify here can be linked to an actual vendor in the Accounts Payable Vendor table.
Credit Card Data	CC_CARD_DATA	Workforce Administration, Job Information, Credit Card	Assign company credit cards to workers.

Entering Credit Card Vendors

Access the Credit Card Vendor page.



Credit Card Vendor page

Vendor ID Enter the vendor ID.

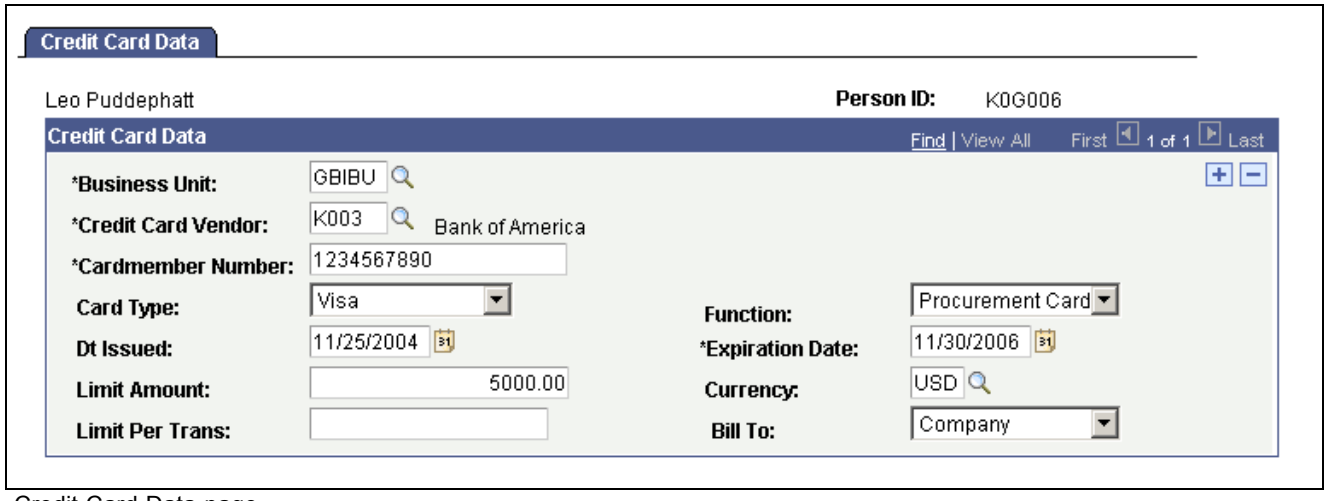
Corporate Number Enter your company's corporate number. This isn't a credit card number.

Bill Includes Tax if Applied Select if the bill includes tax.

Grace Period Days After Billing Date Enter the number of days allowable after the billing date to avoid additional charges.

Assigning Cards to Workers

Access the Credit Card Data page.



Credit Card Data page

Credit Card Vendor Select the card's vendor.

Cardmember Number Enter the card number.

Card Type Select the card type.

Function	Select the main function for this card (for example, debit card, phone card, or corporate card).
Dt Issued (date issued)	Enter the date that the card was issued.
Expiration Date	Enter the date that the card expires.
Limit Amount	Enter the credit card limit amount.
Limit Per Trans (limit per transaction)	Enter the limit amount per transaction.
Bill To	Select whom to bill for this credit card.

Handling Company Property

This section discusses how to:

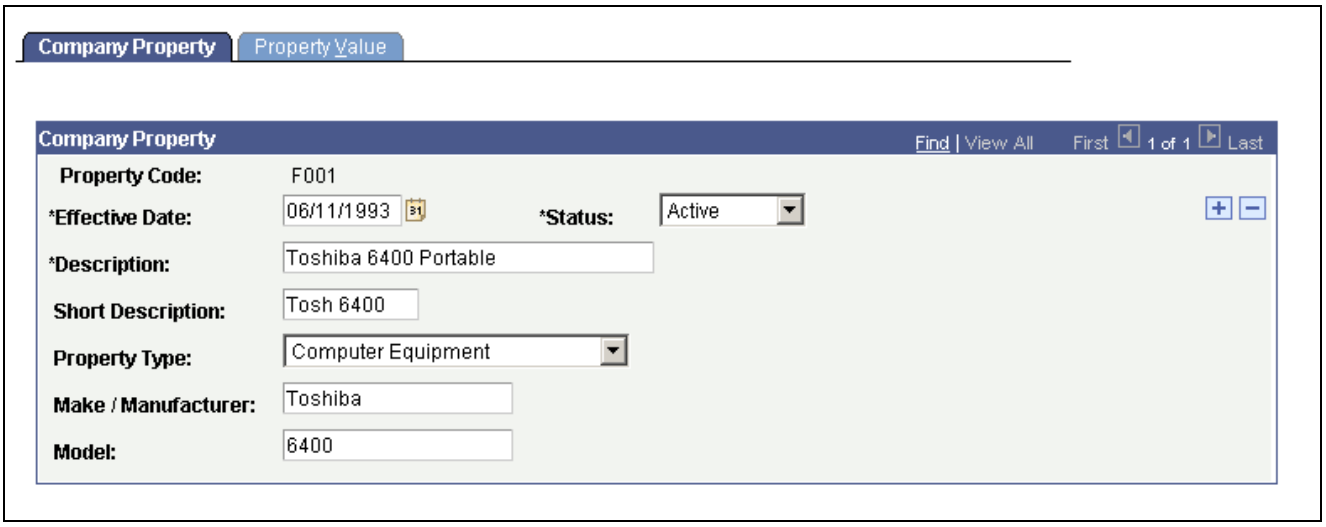
- Identify company property.
- Assign values to company property.
- Assign company property to workers.

Pages Used to Handle Company Property

Page Name	Object Name	Navigation	Usage
Company Property - Company Property	COMPANY_PROP_TBL1	Set Up HRMS, Product Related, Workforce Administration, Company Property, Company Property	Identify company property, such as vehicles, computer equipment, tools, or uniforms.
Property Value	COMPANY_PROP_TBL2	Set Up HRMS, Product Related, Workforce Administration, Company Property, Property Value	Assign values to company property.
Job Information - Company Property	COMPANY_PROPERTY	Workforce Administration, Job Information, Company Property	Assign company property to workers.

Identifying Company Property

Access the Company Property - Company Property page.



Company Property - Company Property page

Property Code Displays the property code for this item.

Property Type Select a type of property, such as *Vehicle* or *Computer Equipment.*

Make/Manufacturer Enter the make and manufacturer for this item.

Model Enter the model.

Car Identification

If you select *Vehicle* as the property type, this group box appears in place of the Make/Manufacturer and Model fields.

Car Identification When you enter a car ID, the system automatically completes the Registration Number, Make/Model, and Color fields based on the values stored for that car ID.

Make/Model Enter the make and model for this car.

Model Enter the model.

Registration Number Enter the car's registration number.

Color Enter the car's color.

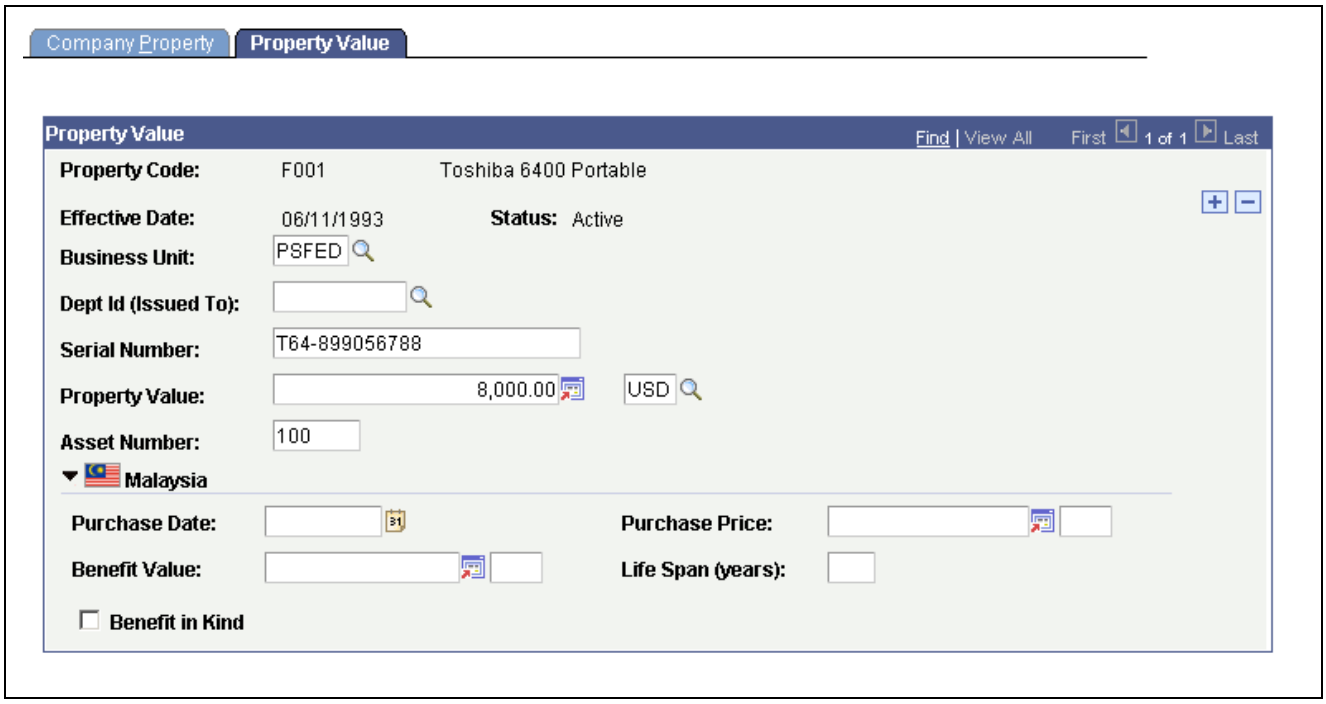
See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Company Cars, "Getting Started with Administer Company Cars"

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Monitor Health and Safety, "Tracking Personal Data for People Involved in Incidents," Entering Non-Employee Data

Assigning Values to Company Property

Access the Property Value page.



Property Value page

Dept ID (Issued To) Enter the identification number of the department to which the property was issued.

Serial Number Enter the serial number.

Property Value Enter the value of the property and the currency that you are using.

Asset Number Enter the asset number.

(MAL) Malaysia

Purchase Price Enter the purchase price.

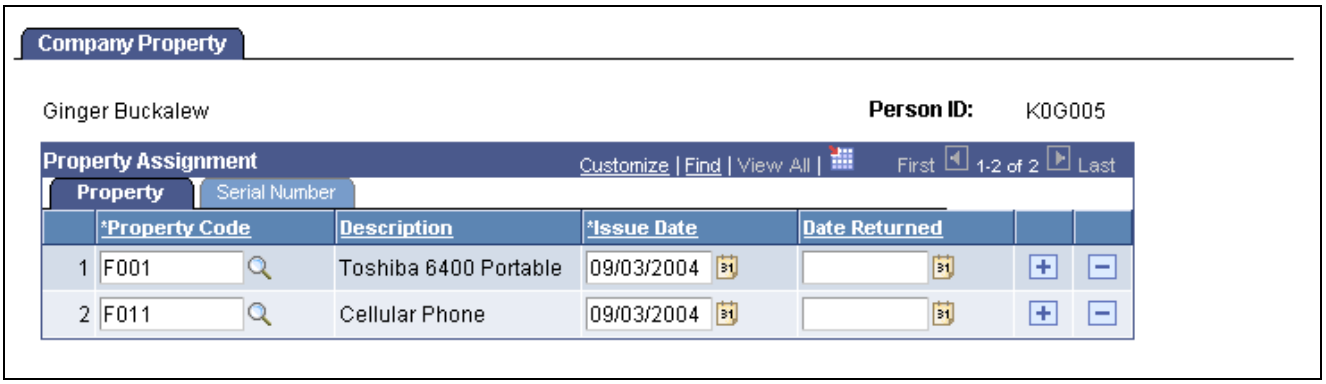
Benefit Value Enter the value of the benefit to be used in calculations

Life Span (years) Enter the number of years expected for the life span of the company property.

Benefit in Kind Select to specify if this property is a Benefit in Kind (BIK)

Assigning Company Property to Workers

Access the Job Information - Company Property page.



Job Information - Company Property page

Property Code Enter the property code for the item that you've assigned to the worker.

Issue Date Enter the date that you issued the property to the worker.

Date Returned After the worker returns the property, enter the date that it was returned.

Serial Number The system displays the serial number of the item that you've assigned to the worker.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Monitor Health and Safety, "Tracking Personal Data for People Involved in Incidents," Entering Non-Employee Data

Tracking Dependent and Beneficiary Data

This section provides an overview of dependent and beneficiary data and discusses how to:

- Enter dependent and beneficiary name information.
- Enter dependent address information.
- Enter dependent and beneficiary information.
- Enter information about court-ordered benefits for dependents.
- (NLD) View an employee's dependents and beneficiaries.
- Enter dependent citizenship and passport information.
- Enter dependent visa and permit data.

Understanding Dependent and Beneficiary Data

Use the Dependent Information component to record important information for dependents that may accompany an employee on an international assignment or international travel. You must also have these pages set up prior to enrolling employees in specific benefit programs.

The Name and Address pages define the relationship of the person to the employee and determine whether the person is a dependent, beneficiary, or both. This definition affects the person's eligibility to be enrolled in health benefits or to be assigned as a beneficiary in certain benefit plans.

The Personal Profile page defines the personal information about the person. This data also affects whether the person is eligible for benefits.

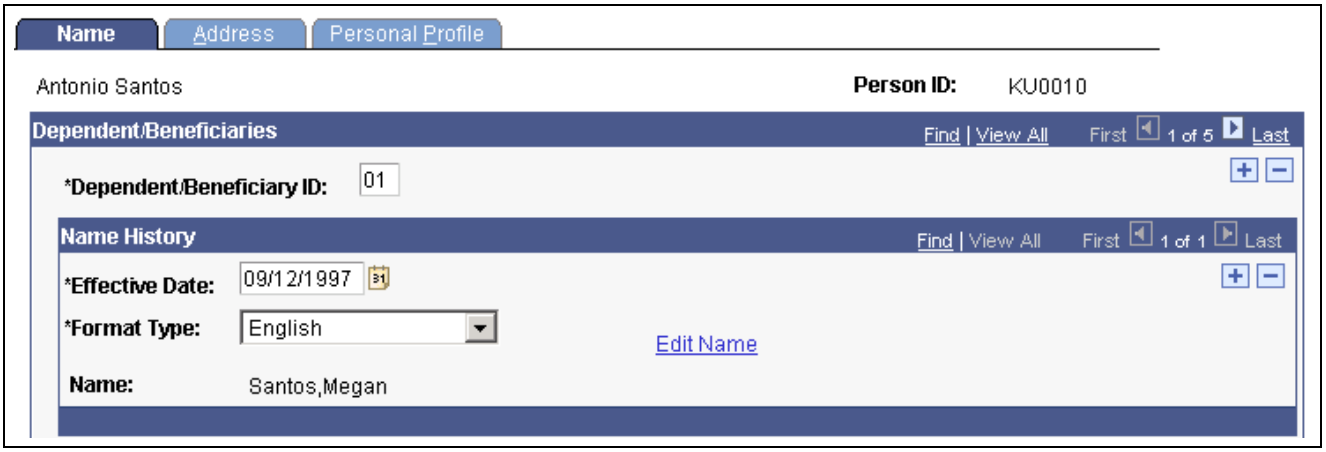
Pages Used to Track Dependent Identification Data

Page Name	Object Name	Navigation	Usage
Name	DEPEND_BENEF1	• Workforce Administration, Personal Information, Personal Relationships, Dependent Information, Name • Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Name	Enter or update information about a dependent's name.
Address	DEPEND_BENEF_ADDR	• Workforce Administration, Personal Information, Personal Relationships, Address • Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Address	Enter or update information about a dependent's address.
Personal Profile	DEPEND_BENEF2	• Workforce Administration, Personal Information, Personal Relationships, Personal Profile • Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Personal Profile	Enter or update information about a dependent.
Dependent/Beneficiary Riders	DEPBEN_RIDERS	Click Riders/Orders on the Dependent Information - Personal Profile page.	Enter detailed information about the court-ordered benefit for the specified dependent or beneficiary.
Personal Profile: Phone Numbers	DEP_BENEF_PHON_SEC	Click Phone Numbers on the Dependent Information - Personal Profile page.	Enter additional dependent and beneficiary phone numbers.
Dependent/Benef	DEPEND_BENEF_SUMM	• Workforce Administration, Benefit Information NLD, Review Benefits, Dependent/Beneficiary Summary, Dependent/Benef • Benefits, Employee/Dependent Information, Review Dep/Ben Summary, Dependent/Benef	View an employee's beneficiaries and dependents.

Page Name	Object Name	Navigation	Usage
Depdnt Identification Details - Depdnt Citizenship/Passport	CITIZEN_PP_DEP	Workforce Administration, Personal Information, Personal Relationships, Depdnt Identification Details, Depdnt Citizenship/Passport	Enter or update dependent citizenship and passport data.
Depdnt Identification Details - Depdnt Visa/Permit Data	VISA_PERMIT_DEP	Workforce Administration, Personal Information, Depdnt Identification Details, Depdnt Visa/Permit Data	Enter or update dependent visa and permit data.

Entering Dependent and Beneficiary Name Information

Access the Dependent Information - Name page.



Dependent Information - Name page

The system displays the name and the employee ID for the employee.

Dependent/Beneficiary ID The system assigns the dependent or beneficiary ID. You can change it, although you can't have duplicate IDs for dependents or beneficiaries of the same employee. You can, however, use these same IDs for a different employee's dependents and beneficiaries.

Effective Date The system enters the current system date in this field, and this date is carried through to all pages of the component. You can change this date if necessary, however in the first row of data for this dependent/beneficiary, the effective date must be the same on all of the pages in this component.

Note. When running a calculation, the system determines if an employee is married by reviewing the dependent and beneficiary table to determine whether there is a dependent identified as the spouse. It is possible for the dependent and beneficiary pages to show more than one spouse, to show a former spouse as a current spouse, to show no spouse even if the employee's marital status is married, or to show a spouse even though the employee's marital status is single. These and other inconsistencies in the dependent and beneficiary data can cause problems with pension calculations. It is best to verify dependent and beneficiary information when calculating pension benefits.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Benefits, "Entering Dependent and Beneficiary Information," Entering Dependent and Beneficiary Information

Entering Dependent Address Information

Access the Dependent Information - Address page.

Dependent Information - Address page

The employee's name and employee ID, as well as this dependent or beneficiary's ID, relationship to the employee, and dependent or beneficiary type appear at the top of the page.

Same Address as Employee and **Address Type**
Select if the dependent has the same address information as the employee, and then select the employee's address type that matches the dependent or beneficiary's address. If selected, you don't need to complete any of the address fields.

Same Phone as Employee and **Phone Type**
Select if the dependent has the same phone information as the employee and then select the employee phone type that is the same as this beneficiary's. If selected, you don't need to complete any of the phone fields. A beneficiary can have the same address as the employee but a different phone number.

Edit Address
Click to enter or edit the dependent's contact address information.

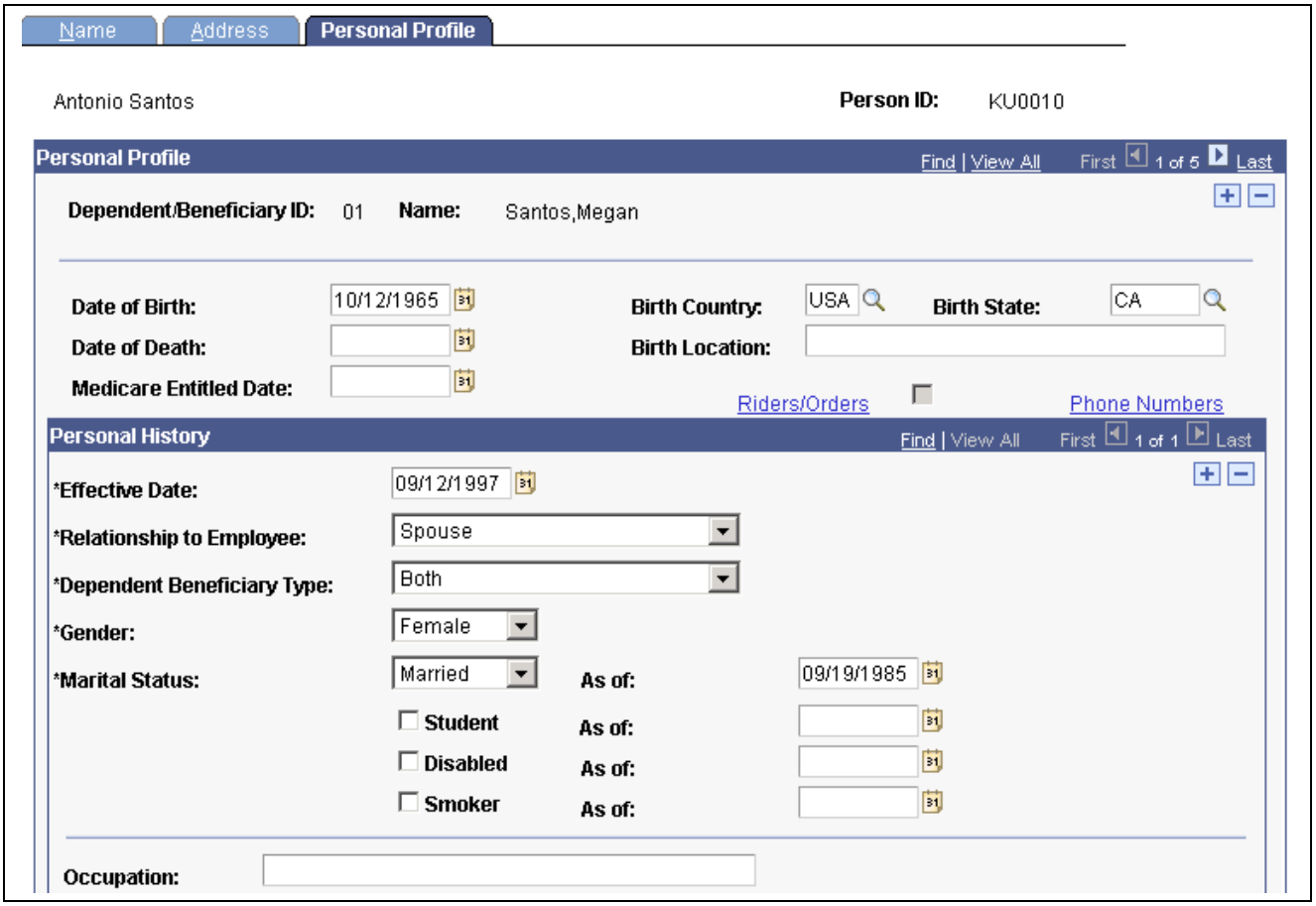
Contact Phone
Enter the dependent's contact phone information in this group box.

See Also

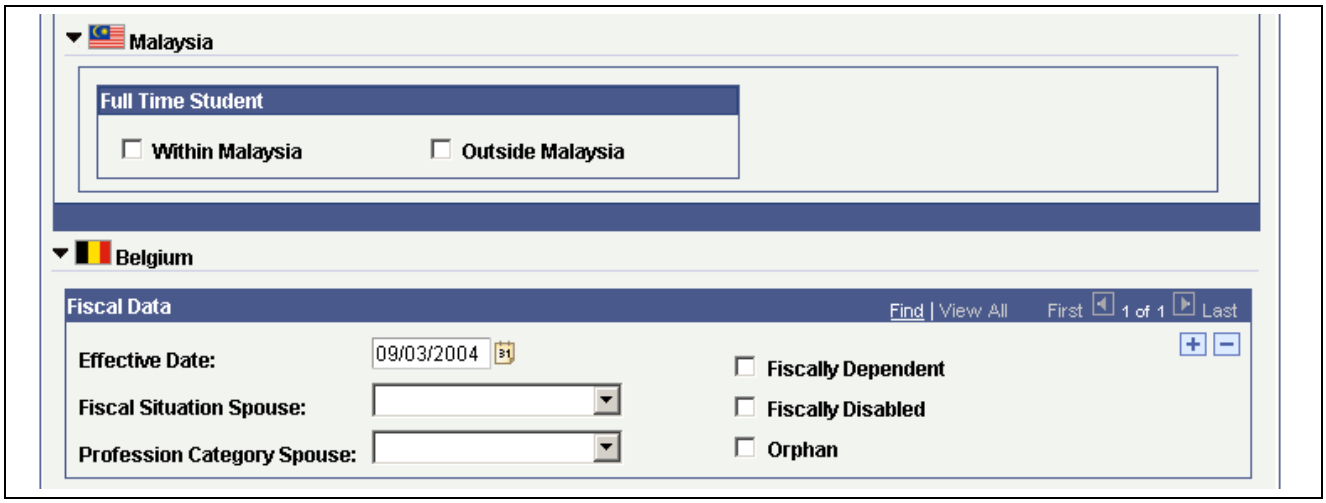
PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up Local Country Functionality," (NLD) Loading Dutch Postal Codes

Entering Dependent and Beneficiary Information

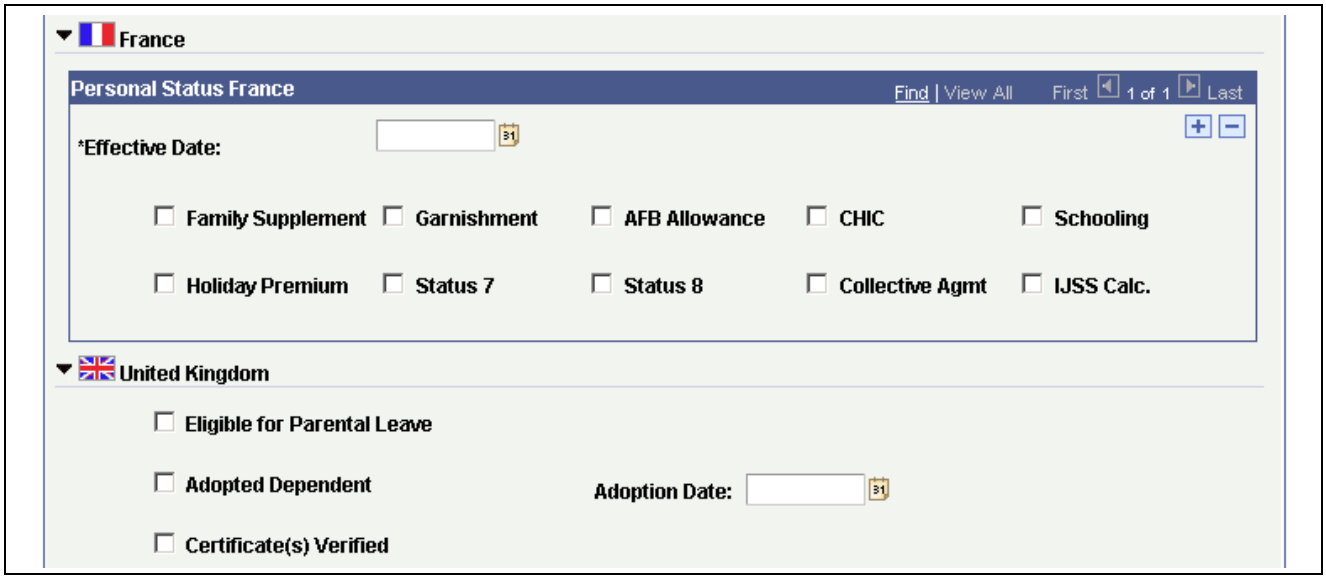
Access the Dependent Information - Personal Profile page.



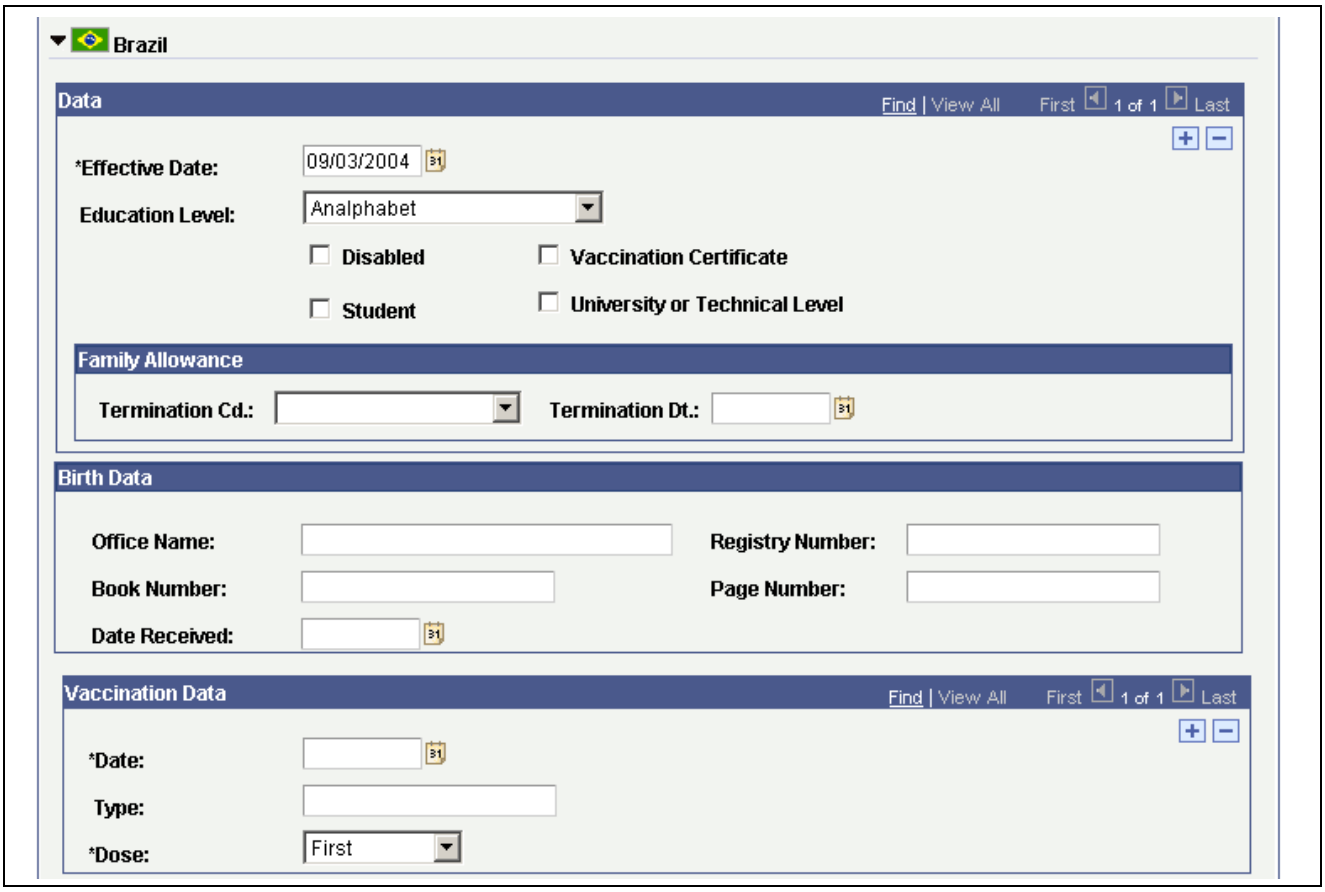
Dependent Information - Personal Profile page (1 of 5)



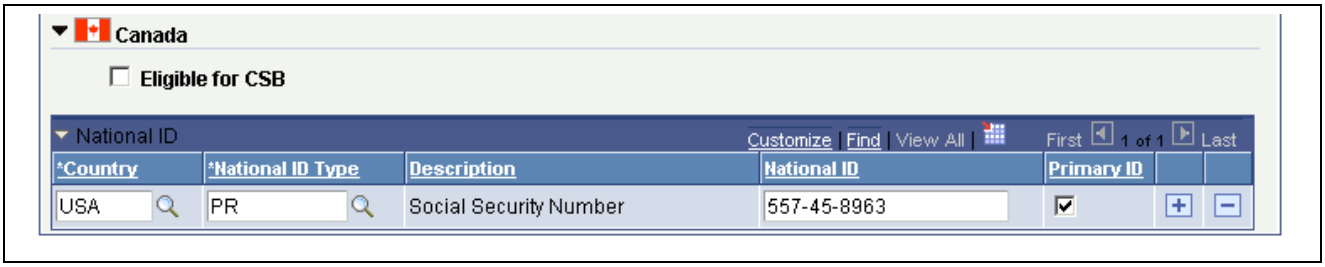
Dependent Information - Personal Profile page (2 of 5)



Dependent Information - Personal Profile page (3 of 5)



Dependent Information - Personal Profile page (4 of 5)



Dependent Information - Personal Profile page (5 of 5)

Date of Birth Enter the dependent or beneficiary's birthdate. Certain benefit plans, such as life insurance, require the birthdate to determine an individual's eligibility.

Birth Country Enter the country in which the dependent or beneficiary was born. Depending on the country you enter, additional fields may appear that require more data entry.

Date of Death When the dependent or beneficiary dies, enter the date of the death.

Birth Location Enter a city, county, or both, to further define the place in which the dependent or beneficiary was born.

Riders/Orders Click to access the Dependent/Beneficiary Riders page.

Phone Numbers Click to access the Dependent Information - Personal Profile: Phone Numbers page.

Relationship to Employee Enter the dependent or beneficiary's relationship to the employee. If you've set up the Dependent Relationship table, the system automatically completes the Relationship to Employee field according to the relationships in the table.

Dependent Beneficiary Type Select the type of dependent or beneficiary. Your selection determines whether you can enroll this person into a benefit plan as a dependent or assign this person as a beneficiary.

If you have set up the Dependent Relationship table, the system uses that information to populate and validate this field. Values are:

Beneficiary: Beneficiary only.

Both: Dependent and beneficiary. If you plan to enroll the person as a dependent *and* assign the person as a beneficiary, you must select this option.

COBRA Dependent Only: COBRA dependent or beneficiary only.

Dependent: Dependent only.

None: The person is neither a dependent nor a beneficiary. This option is typically used when the person is a co-owner of a U.S. savings bond, or to make a person ineligible to participate in a benefit plan.

QDRO Estate: If the beneficiary of a life plan is the estate of an employee, enter this value.

QDRO Representative - Employee: Used for PeopleSoft Enterprise Pension Administration.

QDRO Representative - Recipient: Used for PeopleSoft Enterprise Pension Administration.

Note. (USA) (CAN) The values *COBRA Dependent Only, None, QDRO Representative - Employee,* and *QDRO Representative - Recipient* are Canadian and United States values only.

Marital Status Enter the dependent or beneficiary's marital status.

Marital Status - As of When adding a new dependent, enter the as of date for marital status.

When an individual undergoes a subsequent change in status, the effective date for the change is recorded and the system no longer uses the as of date. This field is critical for determining eligibility for benefits enrollment.

Student Select if the dependent or beneficiary is a student.

Student - As of When adding a new dependent, enter the as of date for the individual's student status.

When an individual undergoes a subsequent change in status, the effective date for the change is recorded and the system no longer uses the as of date. This field is critical for determining eligibility for benefits enrollment.

Disabled Select if the dependent or beneficiary is disabled.

Disabled - As of When adding a new dependent, enter the as of date for the individual's disability status.

When an individual undergoes a subsequent change in status, the effective date for the change is recorded and the system no longer uses the as of date. This field is critical for determining eligibility for benefits enrollment.

Smoker Select if the dependent or beneficiary smokes. The Smoker check box is necessary for dependents who are enrolled in benefit plans that use calculation rules. The system calculates age-graded rates for individuals differently depending on whether they smoke.

Smoker - As of When adding a new dependent, enter the as of date for the individual's smoker status.

When an individual undergoes a subsequent change in status, the effective date for the change is recorded and the system no longer uses the as of date. This field is critical for determining eligibility for benefits enrollment.

Occupation Enter the dependent or beneficiary's occupation, if known.

National ID

Use this group box to enter the dependent or beneficiary's national identification number. Dependents and beneficiaries with citizenship in more than one country can have more than one national ID. Add as many rows as required.

Country Select the country that issued the dependent's national ID.

National ID Type The system populates this field automatically with the default value that you established for this country on the National ID Type Table page. You can select another valid type.

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

Primary ID Select if the national ID is the dependent's primary ID. If this is the only data row for this person, the system selects the check box by default. You can override this default.

(BEL) Belgium

Fiscally Dependent Select if the employee is fiscally responsible for the dependent.

Fiscal Situation Spouse Select the appropriate fiscal situation from the list.

Fiscally Disabled Select if applicable.

Profession Category Spouse Select the appropriate category from the list.

Orphan Select if applicable.

(FRA) France

Use this group box to store information that can be passed to your payroll system for payroll processing.

Family Supplement For numerous families, payroll calculates the family allowance amount that your organization gives to an employee based on their family dependents. This calculation is based on the number and type of employee dependents.

	Select this check box to indicate that the corresponding dependent has to be considered in the calculation of the supplemental family allowance.
Garnishment	This option is for court orders that require that an employee's wages be garnished. When an employee is under a court order, payroll can calculate the percentage and amount of the employee's salary that has to be transferred to the relevant government agency in each pay period. Depending on the number of dependents, this amount is reduced. The greater the number of dependents, the lower the percentage of frozen salary. Select this check box to indicate that the corresponding dependent has to be considered in the calculation of the frozen garnishment amount.
AFB Allowance (French Banking Association allowance)	The French Banking Association delivers a special allowance based on the number of dependents. Select to indicate that the corresponding dependent has to be considered in the calculation of this allowance.
CHIC	CHIC is a medical insurance company that employees can opt to use to supplement their medical insurance coverage. This insurance company delivers a special allowance based on the number of dependents. Select this check box to indicate that the corresponding dependent has to be considered in the calculation of this allowance.
Schooling	See Family Supplement.
Holiday Premium	See Family Supplement.
Status 7 and **Status 8**	Configure these fields to capture additional payroll related status information.

(GBR) United Kingdom

Eligible for Parental Leave	Select if the dependent qualifies the employee for parental leave. Select the Disabled check box on the top page if it also applies here.
Adopted Dependent	Select if the employee adopted the dependent.
Adoption Date	If adopted, enter the adoption date.
Certificate(s) Verified	Select to indicate that appropriate certificates have been provided to verify this dependent information.

(BRA) Brazil

Student	Select to indicate that the dependent is a student. Employees receive income tax benefits for all students up to 21 years old. If the dependent is a student and is less than six years old, the employee should provide a vaccination certificate to the company to receive the income tax benefit.
University or Technical Level	Select to indicate that the dependent is a student at the university or technical level and the employee can receive the income tax benefit for the dependent for additional years (for students up to 24 years old).
Vaccination Certificate	Select if you have received the dependent's vaccination certificate. This information is used for reporting purposes.
Disabled	Select to indicate that the dependent is disabled and the employee can receive the family allowance and income tax benefits for the dependent for additional years.

Termination Cd (termination code)

Enter the reason code for the family allowance termination. Values are:

Child Abandonment: Abandonment of child.

Dependent exceeds ceiling: Dependent's age exceeds maximum age.

Court Decision: Court decision (in case of divorce or separation).

Dependent's Death: Dependent's death.

End Disability: Disability ended.

Child Custody: Custody has been awarded to the other parent.

Termination: Termination.

Termination Dt (termination date)

Enter the family allowance termination date.

Enter information from the dependent's birth certificate in the Birth Data group box. This information is used for reporting purposes.

Enter the type of vaccination, the dose, and the date received for each vaccination on the dependent's vaccination certificate in the Vaccination Data group box. This information is used for reporting purposes.

(CAN) Canada

Eligible for CSB

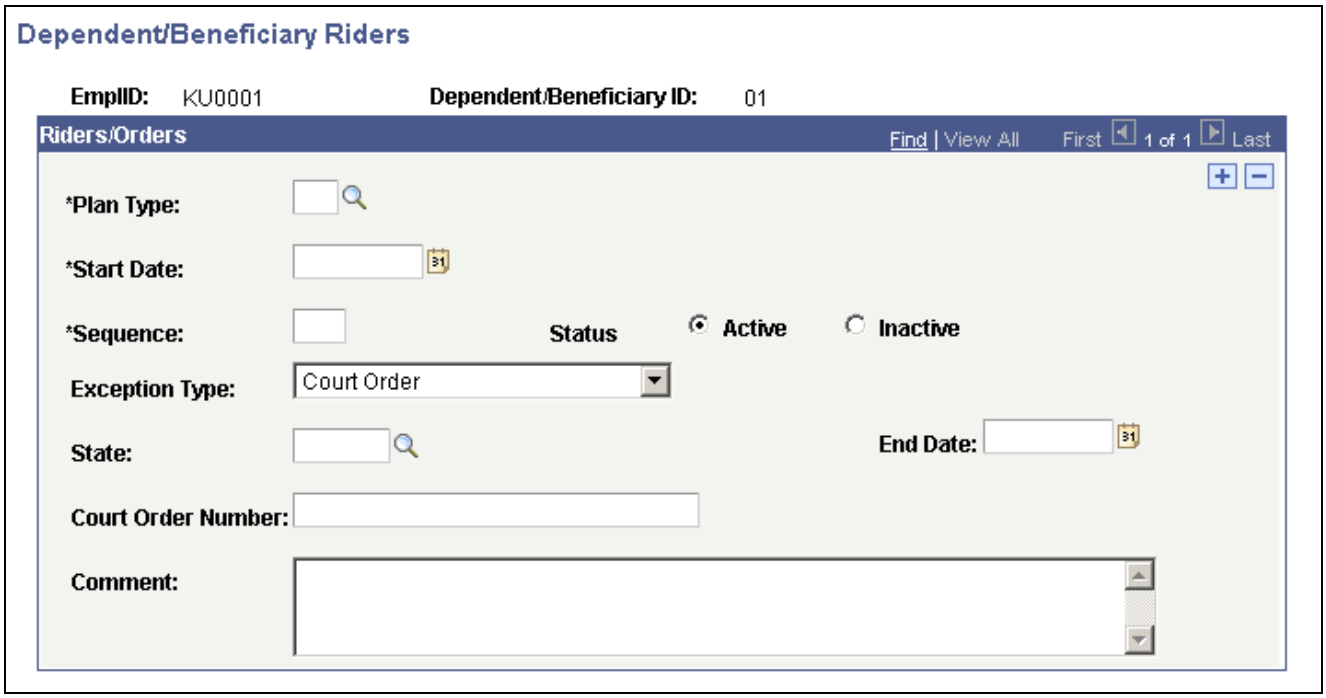
If you are entering dependent and beneficiary information for a Canadian employee, select this check box to indicate that the dependent or beneficiary is an eligible registrant for an employee who is purchasing Canadian Savings Bonds (CSBs). The PeopleSoft Payroll-CSB Registrant page verifies the selection of this check box.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Benefits, "Getting Started With Base Benefits"

Entering Information About Court-Ordered Benefits for Dependents

Access the Dependent/Beneficiary Riders page.



Dependent/Beneficiary Riders page

The Dependent/Beneficiary Riders page enables you to enter any court-ordered benefits or spousal waivers. This page enables the system to validate any changes or omissions in benefit enrollments with a recorded rider. When an employee enrolls in a benefit plan and there is a court-ordered mandate specifying that a benefit be provided, the system does not complete the enrollment.

Plan Type Enter the type of plan to which the court order relates.

Start Date Enter the date on which the court order becomes effective.

Sequence Prioritizes court orders when you have more than one that takes effect on the same day. Enter a number that indicates which court orders take precedence over others. If there is only one court order, enter a sequence of *1*.

Status Select whether the court order is *Active* or *Inactive.* This field is typically used to void a court order before the end date takes effect. If the status is *Inactive,* the system won't enforce any validations against this court order.

Exception Type Select whether this is a court order (a legal document that grants a dependent the right to receive benefit coverage), spousal waiver (document that formally waives a spouse's claim to a minimum beneficiary allocation of funds from a life insurance policy or savings plan), or neither.

End Date Enter the date on which the court order ends. When the court order expires, the system won't enforce any validations against this court order.

Court Order Number Enter the official number that is issued by the state for this court order.

(NLD) Viewing an Employee's Dependents and Beneficiaries

Access the Dependent/Benef page.

Dependent/Beneficiary Summary

This group box displays a summary of all dependent and beneficiary data for an employee.

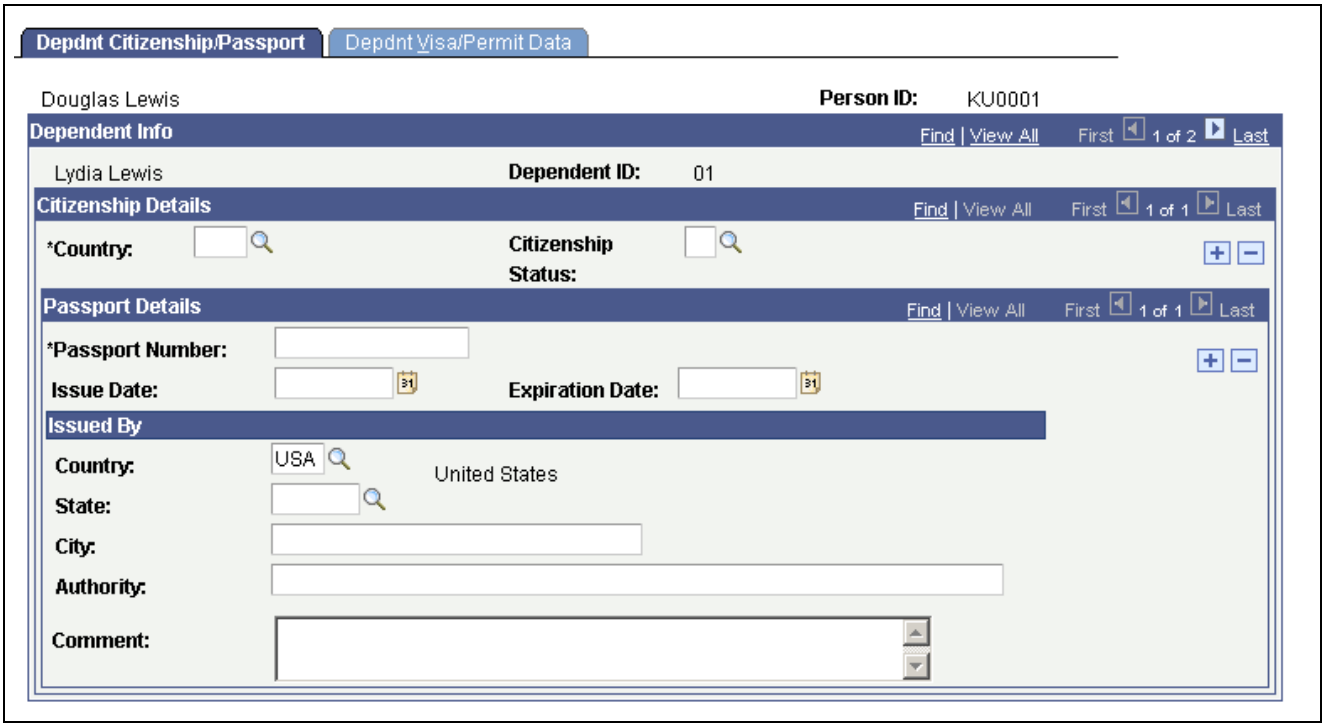
ID	This column displays the ID of the dependent or beneficiary.
Name	This column displays the name of the dependent or beneficiary.
Depend/Benef (dependent/beneficiary)	Indicates whether the person is a dependent or beneficiary.
Relationship	Describes the relationship of the dependents and beneficiaries to the employee.

Note. Over time, changes occur and you need to terminate dependent enrollments or beneficiary statuses. Remember, you enroll dependents and assign beneficiaries when you enroll employees. As with employees, to terminate a dependent enrollment or beneficiary status, you must enter a row of data with the termination date. Don't make such a change using the Dependent/Beneficiary Data page. Make the change using the benefit detail page for the benefit in question.

Warning! If you delete dependent or beneficiary data by using the Dependent/Beneficiary Data pages, you destroy historical data. When you change enrollment data, it won't matter that the dependent or beneficiary data is available here. It must remain if your system is to provide correct historical information.

Entering Dependent Citizenship and Passport Information

Access the Depdnt Identification Details - Depdnt Citizenship/Passport page.



Depdnt Identification Details - Depdnt Citizenship/Passport page

All fields on these pages are described in your benefits documentation.

Note. (DEU) If you administer a workforce in Germany, use the Visa/Permit table to record OECD work permits for OECD nationals who want to work in a protected industry. Because permit types are keyed by country, if you track a German employee's OECD work permit information on the Identification, Visa/Permit table in the Track Global Assignments menu, select *DEU* as the country code from among your valid OECD permit types.

Entering Dependent Visa and Permit Data

Access the Depdnt Visa/Permit Data page.

Enter information on this page in the same manner that you enter data on the Visa/Permit Data page.

See Chapter 7, "Entering Additional Data in Human Resources Records," Entering an Employee's Visa or Permit Information, page 229.

Tracking Emergency Contacts

This section discusses how to enter primary address and phone information for emergency contacts.

Pages Used to Track Emergency Contacts

Page Name	Object Name	Navigation	Usage
Contact Address/Phone	EMERGENCY_CONTACT	Workforce Administration, Personal Information, Personal Relationships, Emergency Contact, Contact Address/Phone	Enter names, addresses, and primary phone information for people to contact in the event of a worker emergency.
Other Phone Numbers	EMERGENCY_CONTACT2	Workforce Administration, Personal Information, Personal Relationships, Emergency Contact, Other Phone Numbers	Record additional phone numbers at which the emergency contact can be reached, such as a work or cellular phone number.
Emergency Contacts	PRCSRUNCNTL	Workforce Administration, Personal Information, Personal Relationships, Emergency Contacts Report	Generate the Emergency Contacts report (PER004). This report lists all contacts on the Emergency Contact table. Run the Refresh Employees Table process before running this report.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "PeopleSoft Application Fundamentals for HRMS Reports"

Entering Primary Address and Phone Information for Emergency Contacts

Access the Contact Address/Phone page.

Contact Address/Phone page

Contact Name Enter the name of the emergency contact person.

Relationship to Employee Select the option that indicates the contact's relationship to the worker.

Primary Contact Select if this is the *first* person whom you should try to contact in an emergency. Select for only one contact.

Same Address as Employee and **Address Type** Select if the contact has the same address information as the worker, and then select the worker address type that is the same as this contact's. If selected, you don't need to complete any of the address fields.

Same Phone as Employee and **Phone Type** Select if the contact has the same phone information as the worker, and then select the worker phone type that is the same as the contact's. If selected, you don't need to complete any of the phone fields. An emergency contact can have the same address as the worker but a different phone number.

Change Country Click to enter or edit the contact's country.

Edit Address Click to enter or edit the contact's address.

Contact Phone Enter the contact's phone information.

Managing Citizenship and Visa or Permit Information

This section provides a list of common elements and discusses how to:

- Track employee passport and citizenship information.
- Enter an employee's visa and permit information.

Common Elements Used to Manage Citizenship and Visa or Permit Information

Expiration Date Enter the expiration date of the visa or permit.

Issue Date Enter the date on which the visa or permit was issued.

Issue Place Enter the location where the visa or permit was issued.

Pages Used to Manage Citizenship and Visa or Permit Information

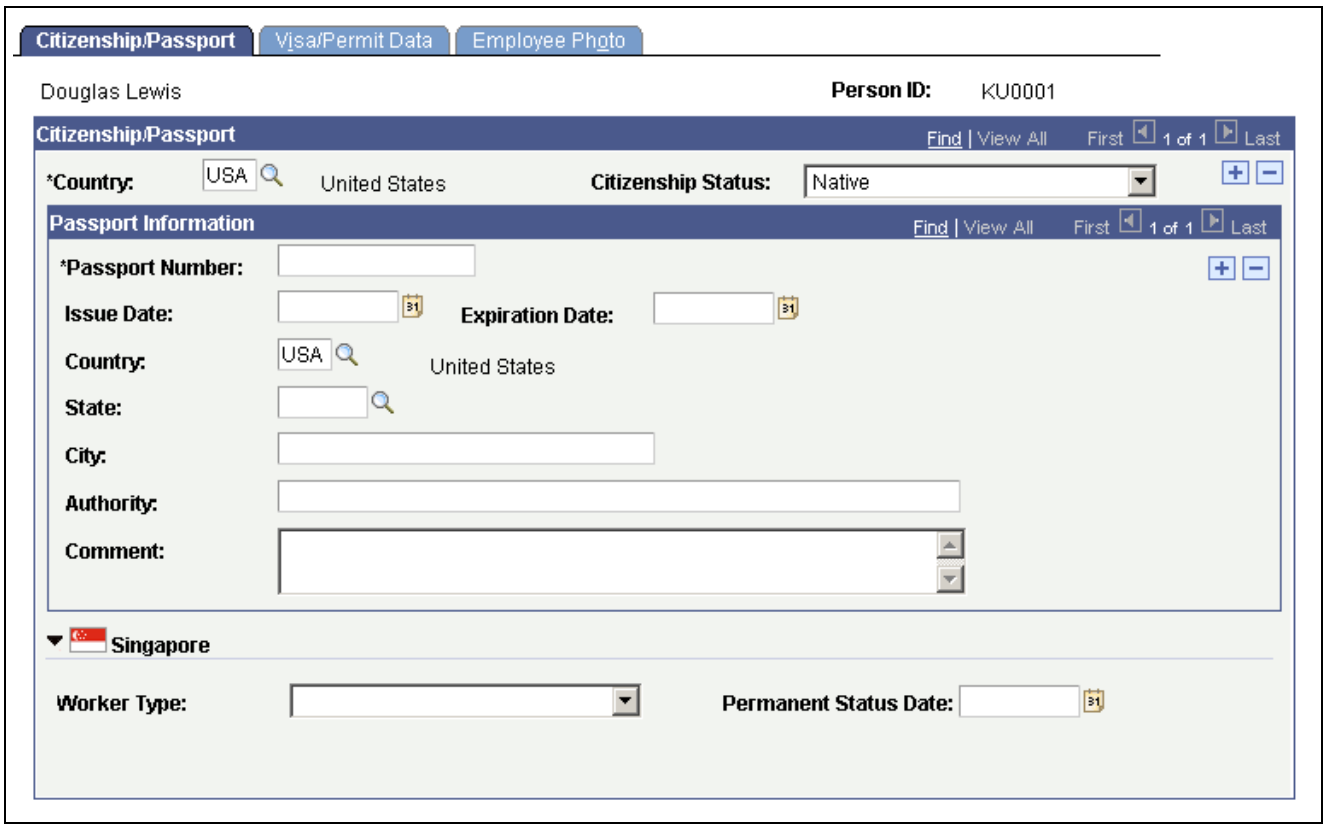
Page Name	Object Name	Navigation	Usage
Citizenship/Passport	CITIZEN_PASSPORT	Workforce Administration, Personal Information, Citizenship, Identification Data, Citizenship/Passport	Track passport and citizenship information for employees. Enter multiple countries of citizenship and multiple passports for employees and their dependents.
Visa/Permit Data	VISA_PERMIT_DATA	Workforce Administration, Personal Information, Citizenship, Identification Data, Visa/Permit Data	Enter an employee's visa or permit information.
Passport/Visa Expiration	PRCSRUNCNTL	Workforce Administration, Personal Information, Citizenship, Passport/Visa Expiration Audit	Generate the Passport/Visa Expiration report (PER032). This report lists employees and dependents that have passports, visas, or work permits on file that expire in 90 days of the report run date. The report is divided into two sections. The first section lists passport information including country, passport number, issue date, and expiration date. The second section lists visa and work permit information including country, visa and work permit number, type of permit, issue date, and expiration date.
Citizenship / Country / Visa	PRCSRUNCNTL	Workforce Administration, Personal Information, Citizenship, Citizenship / Country / Visa Audit	Generate the Citizenship/Country/Visa Audit report (PER033). This report lists discrepancies between employee citizenship country status and visa data. The report displays various discrepancies found for the employee citizenship status in the Personal Data table.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "PeopleSoft Application Fundamentals for HRMS Reports"

Tracking Employee Passport and Citizenship Information

Access the Citizenship/Passport page.



Citizenship/Passport page

Country Enter the employee's country of citizenship.

Citizenship Status Indicate the employee's citizenship status. An employee's birth country and country of citizenship can be different. To track *birth* country information, use the Identity/Diversity page.

Note. (DEU) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV directive. This information is used in DEUEV processing and DEUEV reporting for German organizations or companies doing business in Germany. DEUEV processes and reporting are available only if you are using a German compliant payroll system.

Passport Information

Passport Number Enter the passport number.

Country Enter the originating country for this passport.

Authority Enter the issuing authority, such as the U.S. Passport Agency.

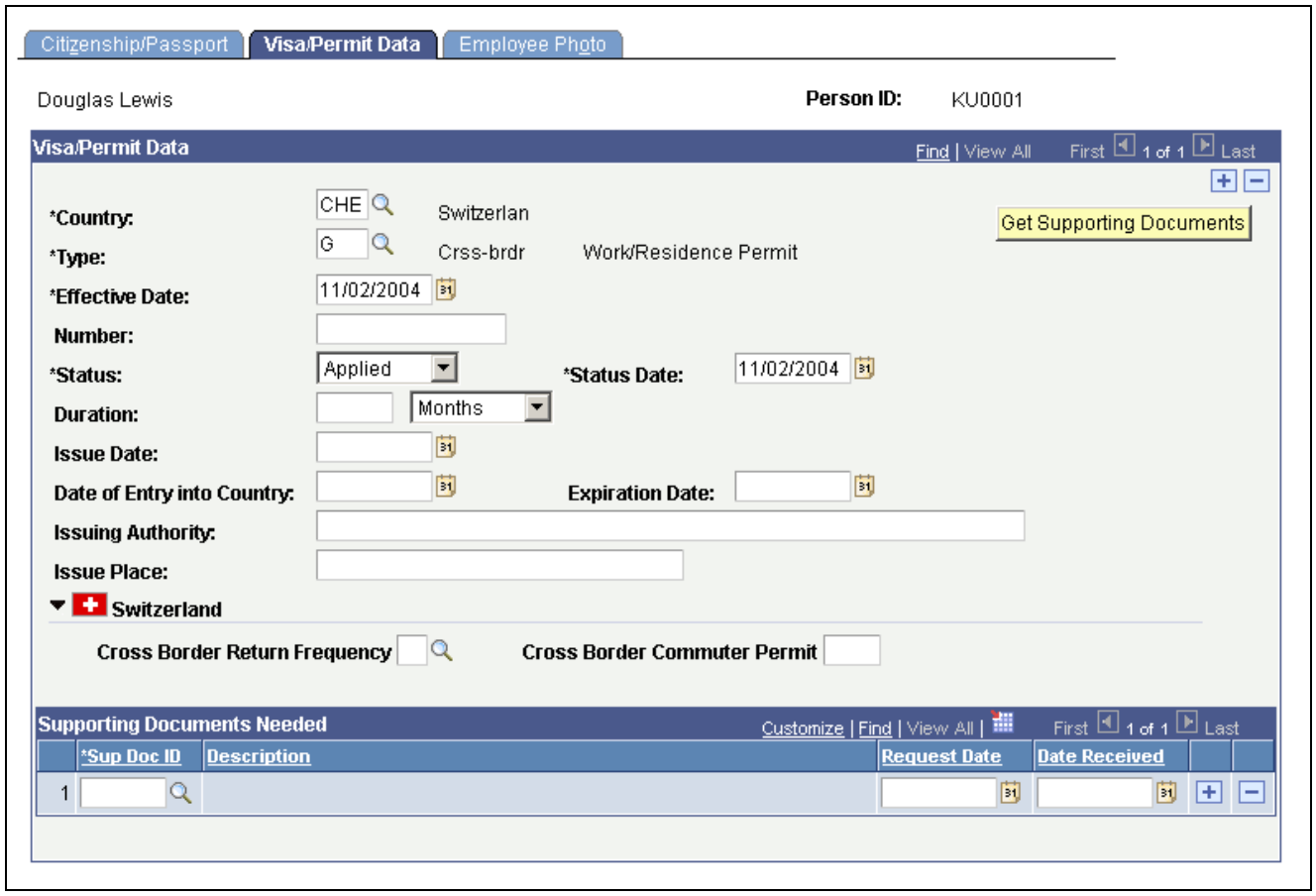
See Also

PeopleSoft Enterprise Global Payroll for Germany 8.9 PeopleBook

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Track Global Assignments, "Setting Up Global Assignments"

Entering an Employee's Visa or Permit Information

Access the Visa/Permit Data page.



Visa/Permit Data page

Type Select a type of visa or permit. The system prompts you with only types that are associated with the selected country.

Get Supporting Documents Click to have the system enter a list of the appropriate supporting documents that are needed to obtain the visa or permit type that you entered.

Number Enter the visa or permit number.

Status Select the visa or permit status: *Applied, Granted, Renewal,* and *Renewed.*

Status Date Enter the date on which the status of the visa or permit changed.

Duration Enter the number of days, months, or years that the employee stayed in the country. Select the unit of duration *(Days, Months,* or *Years)* in the adjacent field.

Date of Entry into Country Enter the date on which the employee entered the country.

Issuing Authority Enter the agency that issued the visa or permit, such as the U.S. Department of State or the French Consulate.

Supporting Documents Needed

Sup Doc ID (supporting document ID) If additional documents are required for this employee to obtain the visa or permit type, select a supporting document ID.

Request Date Enter the date on which the documents were requested.

Date Received Enter the date on which the documents were received.

(CHE) Switzerland

Cross Border Return Frequency Enter the frequency this employee travels to their home outside of Switzerland:

D: daily.

W: weekly.

This is a required field when the type of permit is:

G: Cross Border Commuter.

PG: Border Crossing Permit.

Cross Border Commuter Permit Enter the permit number for the Cross Border Commuter Permit.

Note. (DEU) If you're administering a workforce in Germany, use the Visa/Permit table to record OECD work permits for OECD nationals who want to work in a protected industry. Because permit types are keyed by country, if you're tracking a German employee's OECD work permit information on the Identification - Visa/Permit Table page in the Administer Workforce menus, select *DEU* as the country code to select from among your valid OECD permit types.

See Also

Chapter 3, "Setting Up Country-Specific Tables," Entering German Nation DEUEV Codes, page 27

Managing Driver's License Information

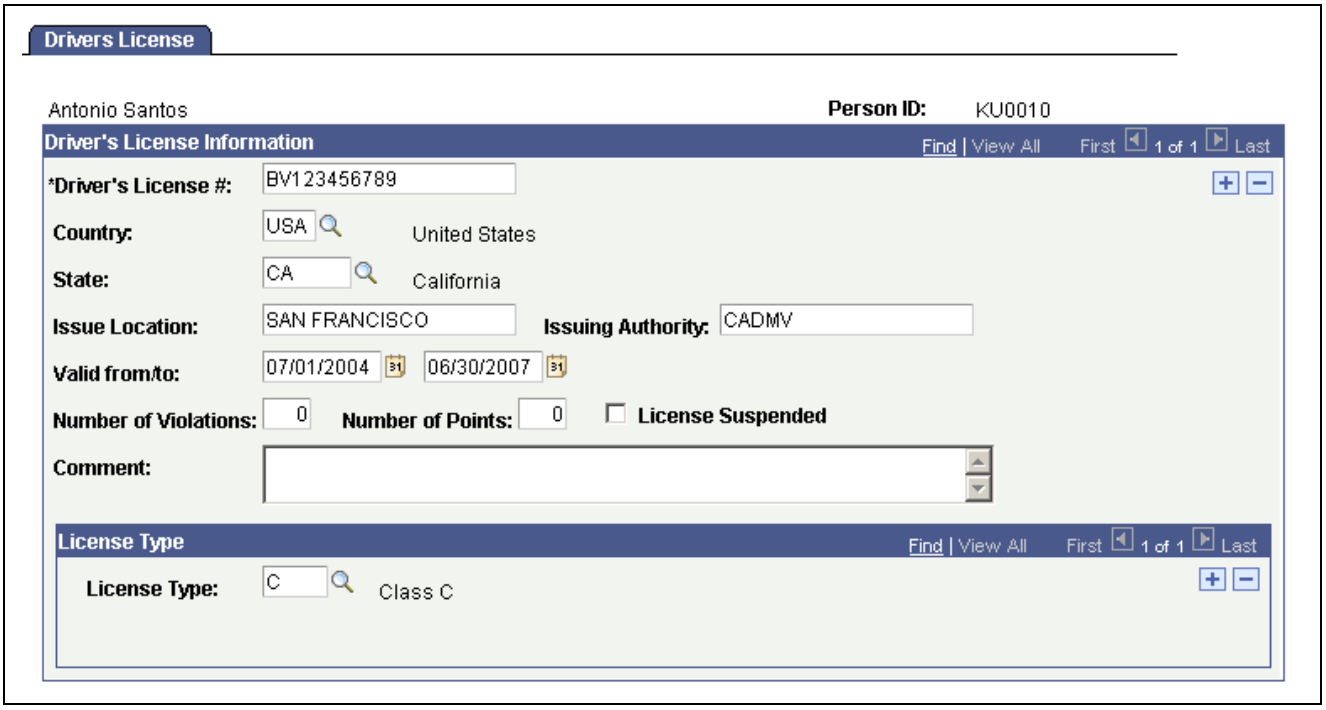
This section discusses how to enter license numbers and other driving record information.

Page Used to Manage Driver's License Information

Page Name	Object Name	Navigation	Usage
Drivers License	DRIVERS_LIC_GBL	Workforce Administration, Personal Information, Biographical, Driver's License Data	Enter license numbers or other data from a worker's driving record.

Entering License Numbers and Other Driving Record Information

Access the Drivers License page.



Drivers License page

Driver's License # (Driver's License Number) Enter the license number.

Issue Location Enter the location where the license was issued.

Issuing Authority Enter the agency that issued the driver's license, such as the Department of Motor Vehicles.

Valid from/to Enter the dates on which the driver's license remains valid. The *to* date must be in the future.

Number of Violations Enter the number of traffic violations cited on the worker's driving record.

Number of Points Enter the number of points accumulated on the worker's driving record.

License Suspended Select if the worker's driver's license is currently suspended.

License Type Enter the type of license held by the worker.

If you need to enter more than one driver's license for a worker, add a new data row.

Entering Bank Account Information

This section discusses how to:

- Record worker bank account information.

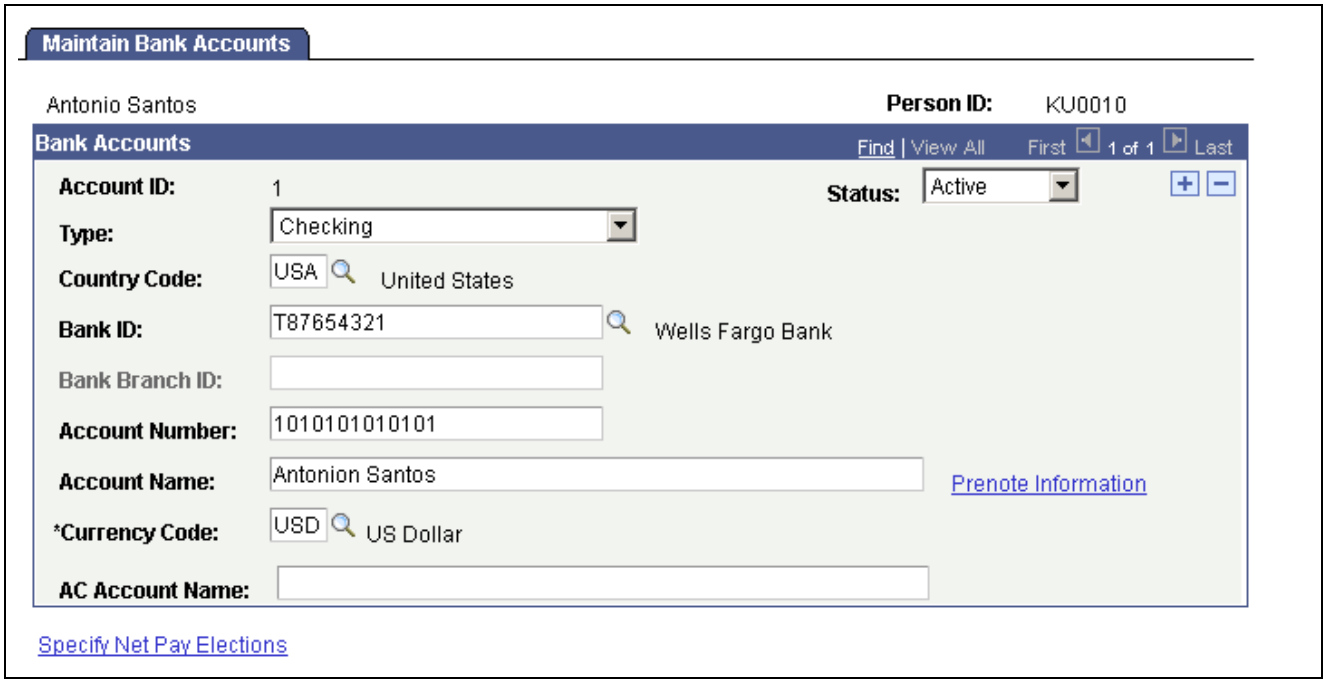
- (GBR) Enter a worker's building society roll number and name.

Pages Used to Enter Bank Account Information

Page Name	Object Name	Navigation	Usage
Maintain Bank Accounts	PYE_BANKACCT	Workforce Administration, Personal Information, Biographical, Bank Accounts	Record information about worker bank accounts. Use this information to track worker direct deposit information.
Building Society Details	PYE_BS_SP_UK	Click the Other Required Information link on the Bank Account Information page.	For this page to appear, the country code must be *GBR* and the building society ID must have a value. Enter a worker's building society roll number and name.
Bank Prenote Information USA	GPUS_PRENOTE	Click the Prenote Information link on the Bank Account information page.	Indicate whether prenotification files (used in Federal Schedule Reconciliation) need to be generated.

Recording Employee Bank Account Information

Access the Maintain Bank Accounts page.



Maintain Bank Accounts page

Note. Before you can enter a worker's bank details, first set up the bank branch or building society on the Bank/Branch Table page.

Account ID The system creates an account ID when you enter a new bank or building society account for a worker. This field is for information only.

Type Select the type of account that you are tracking.

Country Code Enter the country where the bank account is located. When you move out of this field, the system populates the Currency Code field with the appropriate currency.

Bank ID Enter the bank ID.

Bank Branch ID Enter the bank branch ID for the account.

Building Society ID If you entered *GBR* in the Country Code field, this field replaces the Branch ID field. See details below.

Account Number Enter the account number.

Account Name Enter the account name.

Prenote Information (USA) Click this link to access the Bank Prenote Information USA page.

Edit IBAN (GBR) Click this link to access the International Bank Account Number page.

AC Account Name Enter the alternate character account name, if applicable.

Specify Net Pay Elections Click this link to access the Specify Net Pay Elections page.

(GBR) Entering Banking Information for UK Workers

UK customers also use this page to record workers' building society account information. When you enter *GBR* in the *Country* field, the Bank Branch ID field becomes the Bld Soc ID (building society ID) field.

UK customers who enter details of UK bank and building society accounts should enter the following information in the fields on the Bank Account Information page:

Field	UK Bank and Building Society Information
Type	Select an account type: *Current Account:* Select for a bank account. *Building Society Roll Number:* Select for a building society account. *Savings:* Not applicable to the UK. *Checking:* Not applicable to the UK.
Country Code	Enter *GBR*.
Bank ID	If the worker has a bank account, select the bank branch from the list of branches set up in the Bank table. If the worker has a building society account, leave this field blank.

Field	UK Bank and Building Society Information
Building Society ID	If the worker has a building society account, select the building society from the list of societies set up in the Branch table. When you select a building society, the system automatically completes the Bank ID field with the bank that handles clearing for the selected building society. If the worker has a bank account, leave this field blank.
Account Number	Enter the worker's bank account number. If you selected a building society in the Building Society ID field, the system automatically completes the Account Number field with the building society's account at the clearing bank and makes the field display-only. **Note.** To enter the worker's building society account details, click Other Required Information.
Account Name	Enter the account name. If you selected a building society in the Building Society ID field, the system makes this field display-only. Click Other Required Information to display the Building Society Details page where you enter the account name.
Currency Code	The system provides a default value of *GBP* (Pound Sterling). Override this default if necessary.
Other Required Information	Click to display the Building Society Details page, where you enter the worker's building society account details. The system does not display this link if you select a normal bank branch in the Bank ID field.

Note. For more information about the account number formats for a country, see the corresponding PeopleSoft Enterprise Global Payroll local country documentation.

See Also

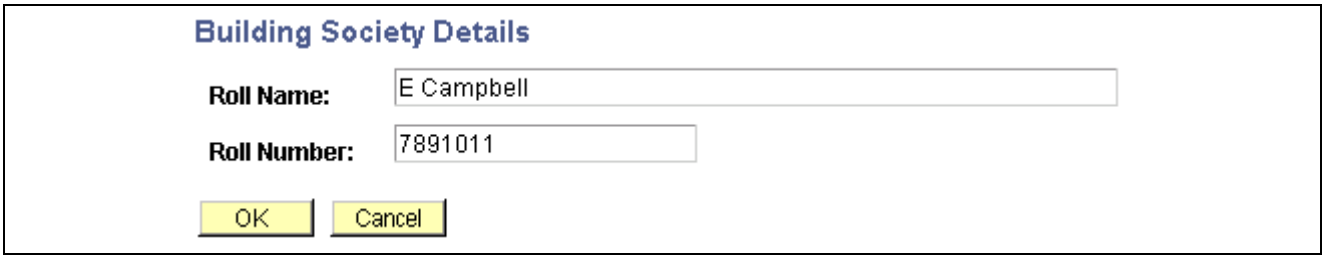
PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up Banks and Bank Branches"

PeopleSoft Enterprise Global Payroll for United States 8.9 PeopleBook, "Defining Banking," Managing the Prenotification Process

PeopleSoft Enterprise Global Payroll 8.9 PeopleBook, "Defining Banking Instructions"

(GBR) Entering a Worker's Building Society Roll Number and Name

Access the Building Society Details page.



Building Society Details page

When you select a building society ID, the Other Required Information link appears on the page.

Roll Name Enter the roll name of the worker's building society account.

Roll Number Enter the worker's building society account number.

Tracking Volunteer Activity

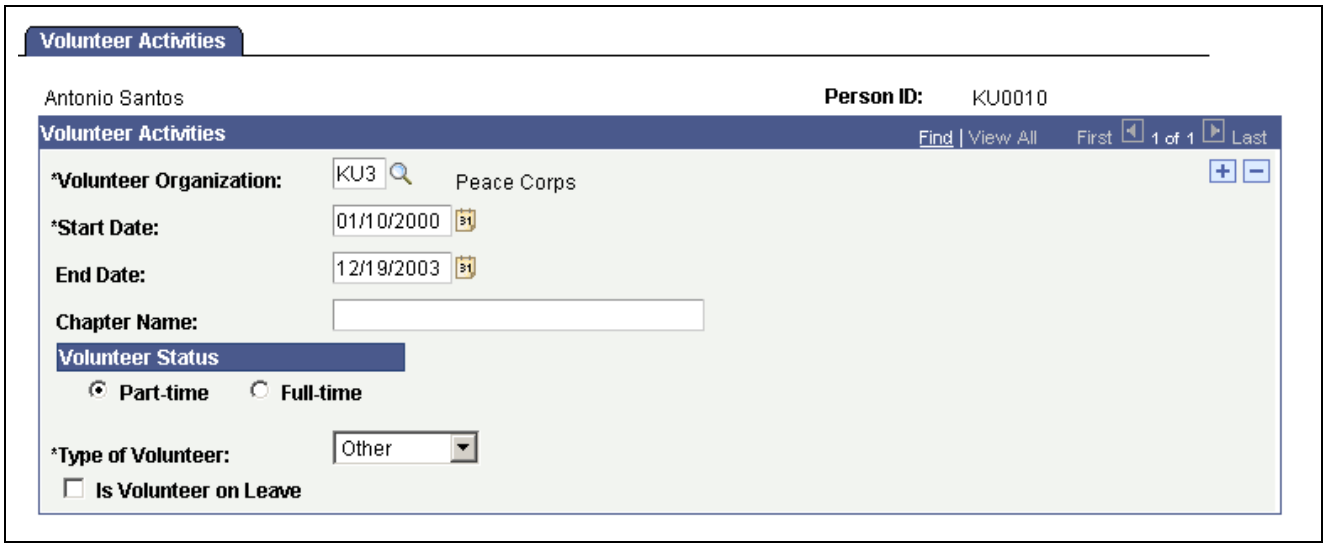
This section discusses how to enter information on worker volunteer activities.

Page Used to Track Volunteer Activity

Page Name	Object Name	Navigation	Usage
Volunteer Activities	VOLUNTEER_ACTIVITY	Workforce Administration, Personal Information, Biographical, Volunteer Activities	Enter information on worker volunteer activities. Track multiple volunteer organizations for workers and multiple start dates with the same organization.

Entering Information on Worker Volunteer Activities

Access the Volunteer Activities page.



Volunteer Activities page

Volunteer Organization Select a volunteer organization code.

Start Date and **End Date** Enter the start and end date of the worker participation.

Volunteer Status Select either *Part Time* or *Full Time* to indicate the volunteer status.

Type of Volunteer Select the type of volunteer activity in which the worker is participating: *Administr, Canvasser, Executive, Fund Raise,* or *Other.*

Is Volunteer on Leave Select if the volunteer is on leave.

Note. This check box is for informational purposes only. If you select this check box, you don't affect any Monitor Absences business process functionality.

Note. This information is useful when you need to track workers' additional skills and knowledge, and when you measure the effectiveness of company-sponsored volunteer and charitable programs.

Entering and Tracking Additional Workforce Data

This section discusses how to:

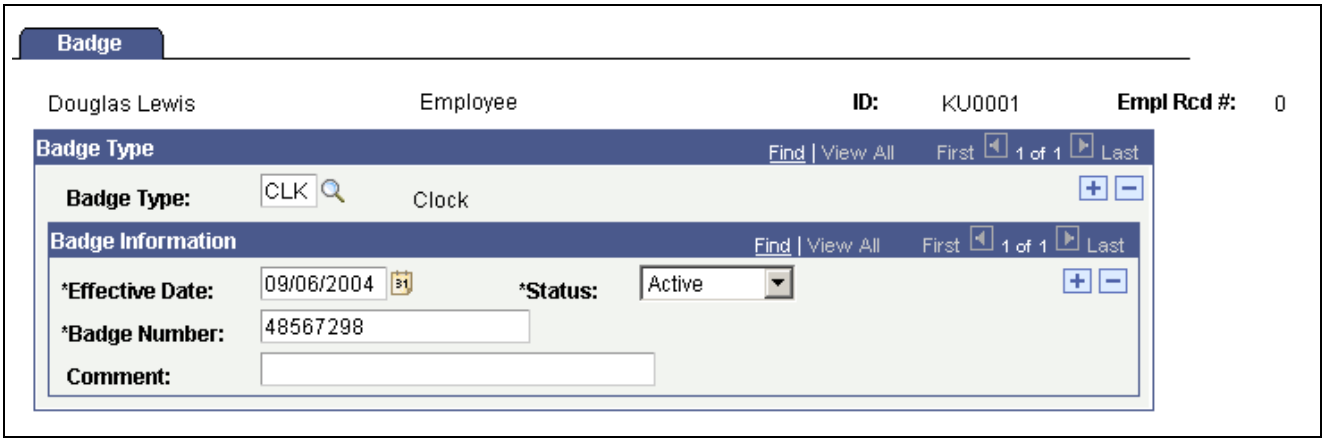
- Record badge numbers.
- Track a worker's business expenses.
- Track prior work experience.
- Enter worker images.

Pages Used to Enter and Track Additional Workforce Data

Page Name	Object Name	Navigation	Usage
Badge	BADGE	Workforce Administration, Job Information, Badge	Record badge numbers that you issue to workers.
Business Expenses	BUSINESS_EXPENSES	Workforce Administration, Job Information, Business Expenses	Track a worker's business expenses, such as travel, meals, entertainment, and relocation costs.
Prior Work Experience	PRIOR_WORK_EXPER	Workforce Administration, Personal Information, Biographical, Prior Work Experience	Track prior work experience. Enter the details of a worker's previous employers and jobs.
Employee Photo	EMPLOYEE_PHOTO	Workforce Administration, Personal Information, Citizenship, Identification Data, Employee Photo	Enter a worker image into the system by copying and pasting images into image fields.
General Comments	GENL_COMMENTS	Workforce Administration, Personal Information, Biographical, General Comments	Enter a miscellaneous comment about a worker.

Recording Badge Numbers

Access the Badge page.



Badge page

You must have previously entered Badge Type data on the Translate table before using this page.

Badge Type Select the type of badge number that you want to enter:

BA (Building Access).

CCA (Computer Center Access).

CLK (Clock).

GB (General Badge).

PA (Parking Access).

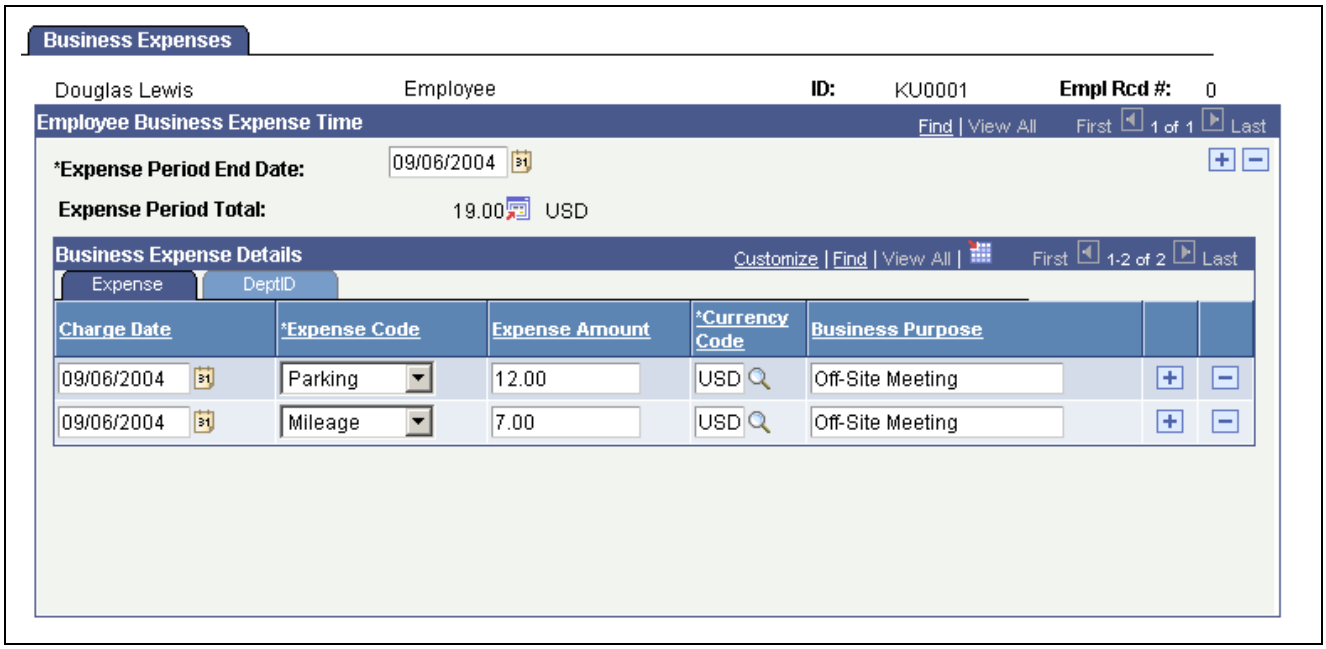
Add more values if you want or enter more than one badge type for a particular worker and employment record number.

Badge Number Enter the badge number that corresponds to the badge type that you selected. The system ensures that the number that you enter isn't currently assigned to another worker. It also ensures that the number hasn't been assigned for future use by someone else.

For each badge type, only one badge number per worker and employment record number can be active at the same time. Badge numbers can be reused. If a combination of badge type and badge number was previously assigned to a worker, but is currently inactive and hasn't been assigned for future use, you can use it for a different worker and employment record number.

Tracking a Worker's Business Expenses

Access the Business Expenses page.



Business Expenses page

Before you can track a worker's business expenses, you must set up:

- Valid expense codes on the Translate table.
- User IDs on the Primary Permission List Preferences table.
- Currency codes on the Currency Code table.
- Departments on the Department table.

Expense Period End Date Enter the expense period end date for the period to which these expenses apply.

Charge Date Enter the date of the actual expense charge.

Expense Code Select an expense code, such as *Airfare,* for the charge.

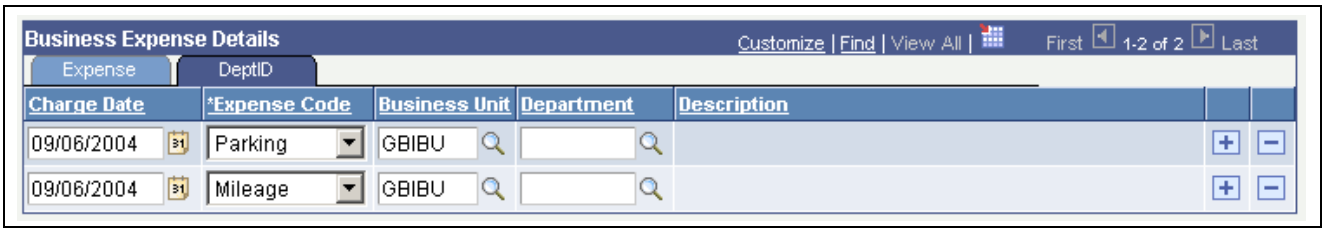
Expense Tab

Expense Amount Enter the amount of the expense.

Currency Code The currency that is specified for your user ID on the Primary Permissions List Preferences table appears by default. If there is no To Currency for your user ID, then the system uses the base currency that you specified for your implementation on the Installation table. Override the default currency if necessary by using the values in the Currency Code table.

DeptID Tab

Select the DeptID tab.



Business Expenses: DeptID tab

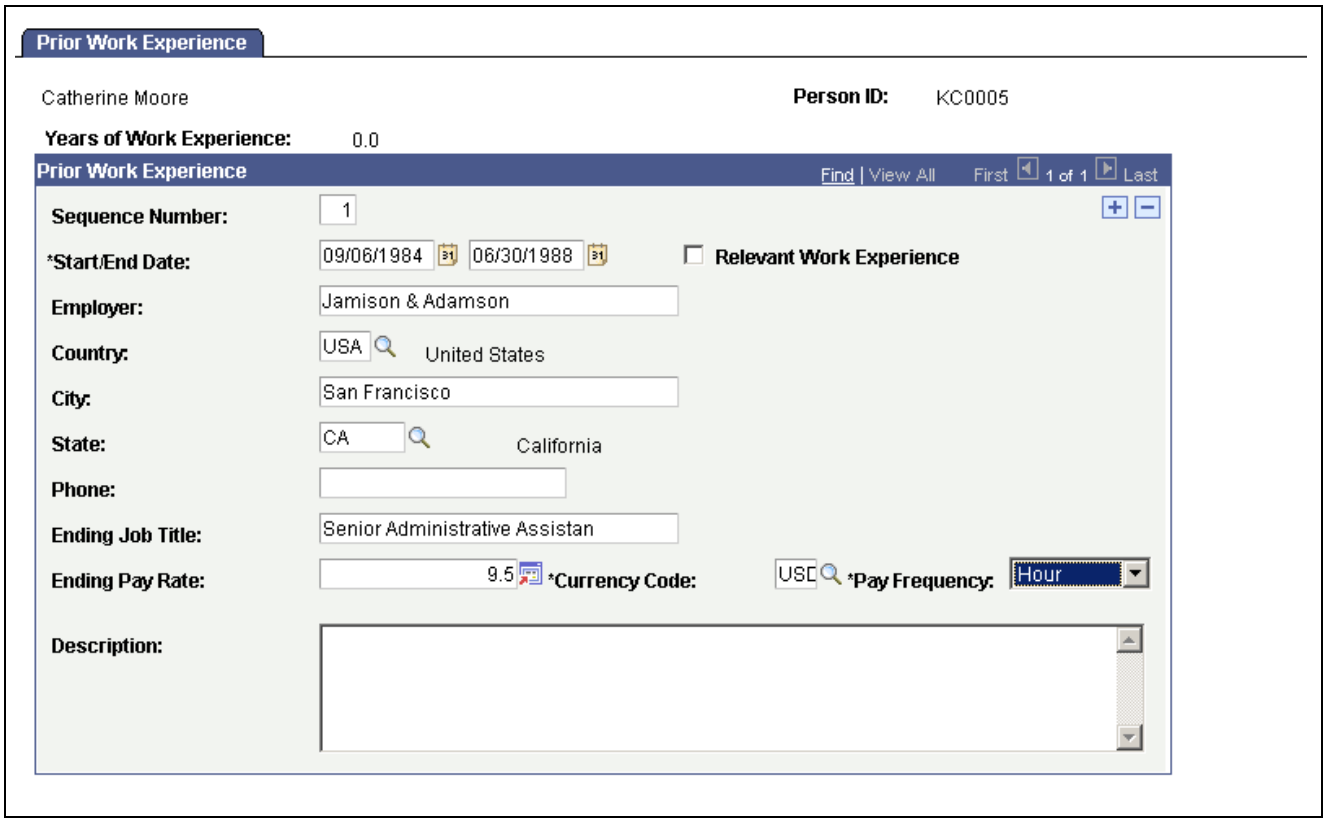
Business Unit Enter the business unit to which the expense should be charged.

Department Select the specific department to which the expense should be charged.

Warning! The information that you enter here isn't related to PeopleSoft Enterprise Payroll for North America processing of business expenses.

Tracking Prior Work Experience

Access the Prior Work Experience page.



Prior Work Experience page

If you've tracked an applicant through the Recruiting business process in PeopleSoft Enterprise Human Resources, the information that you entered for an applicant becomes part of the employee record when you hire the person. For other workers, entering prior work experience information helps you establish a complete profile for reporting purposes. It's also useful for career and succession planning.

Years of Work Experience The system calculates this value if you select the Relevant Work Experience check box. If so, you must enter a start date and end date.

Sequence Number Enter a sequence number for each prior work experience record.

Start/End Date Enter the beginning and end of the worker's tenure with the employer.

Relevant Work Experience Select if the experience was relevant to the worker's responsibilities with your organization.

Employer Enter the name of the worker's previous employer.

Ending Job Title Enter the title in which the worker ended employment.

Ending Pay Rate Enter the pay rate at which the worker ended employment.

Frequency The pay Frequency field contains a default value of *Month,* which you can change if the pay amount reflects a different frequency.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Plan Careers and Successions, "Planning Careers"

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "PeopleSoft Application Fundamentals for HRMS Reports"

Entering Worker Images

Access the Employee Photo page.

Before you insert an image (such as an employee photograph) in PeopleSoft Enterprise Human Resources, use a Windows-based graphics or drawing program to capture (and edit if necessary) the image or scanned photograph that you want to insert. Then use the Windows-based program to highlight the image or portion of it that you want to copy, and copy it to the Microsoft Windows clipboard. In most drawing programs, you can do this by selecting Edit, Copy, or pressing CTRL+C.

Click or tab to the image field and select Edit, Paste, or press CTRL+V to paste the image in the field. Click the Add button to browse for and upload a picture (such as Bitmap or .bmp files).

Note. Full imaging capabilities may not be supported on all database platforms.

See Also

PeopleTools 8.45 PeopleBook: PeopleSoft Application Designer

CHAPTER 8

(BEL) Entering Additional Data for Belgian Workers

This chapter discusses how to:

- Track Claeys formula calculations.
- Prepare for severance calculations.
- Perform the Claeys calculation.
- Generate *Déclaration Immédiate – Onmiddelijke Aangifte* (DIMONA) notifications.
- Run the Social Report.

Tracking Claeys Formula Calculations

To track Claeys formula calculations, use the End Contract Type - BEL (END_CONT_TBL_BEL), End Contract Reason - BEL (REAS_END_TBL_BEL), Statute Table (STATUTE_TBL_BEL), Reduced Charged Table (RED_CHRG_TBL_BEL), RSZ Category Table (CONTR_RSZS_BEL), Contract Ending (CONTRACT_END_BEL), and Contract Replacement (CONTRACT_REPL_BEL) components.

If you're administering a Belgian workforce, you need to set up codes for events or conditions that may play a role in the termination of a Belgian worker's employment contract, and for the special reasons that are associated with those conditions. You also specify employment contract statutes and substatutes, and track special jobs that allow for lower premiums than are normally required by Belgian labor regulations.

Many of the tables that you set up for these purposes contain information that you use when performing Claeys formula calculations. The Claeys formula is used by employers to calculate the cost of terminating a worker's contract, based on number of service years, salary, age, seniority, type of employment contract, and so on.

This section discusses how to:

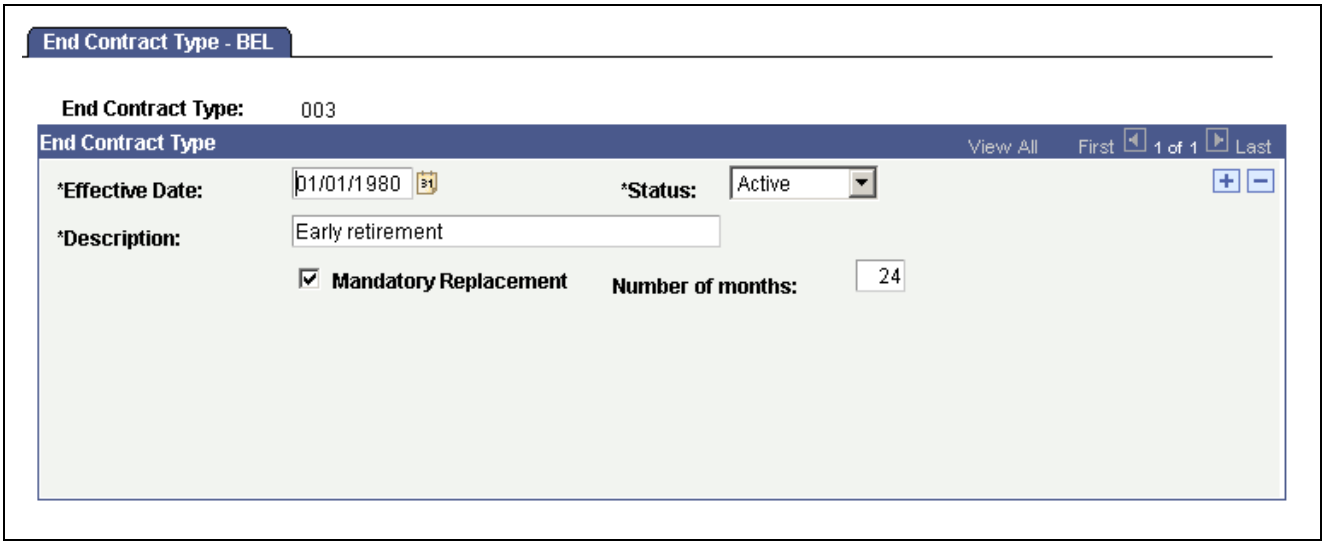
- Enter codes for events and conditions that result in terminating employment contracts.
- Define reason codes for ending employment contracts.
- Set up Belgian employment contract statutes for Claeys calculations.
- Link contract statutes to RSZ categories.
- Record information that is necessary for terminating a Belgian worker.
- Enter a replacement worker for the employment contract.

Pages Used to Track Claeys Formula Calculations

Page Name	Object Name	Navigation	Usage
End Contract Type - BEL	END_CONT_TBL_BEL	• Set Up HRMS, Product Related, Workforce Administration, Workforce Data BEL, Contract End Types • Workforce Administration, Job Information, Contract Administration, Define Contract End BEL	Enter or update codes for events and conditions that could result in the termination of employment contracts.
End Contract Reason - BEL	REAS_END_TBL_BEL	• Set Up HRMS, Product Related, Workforce Administration, Workforce Data BEL, Contract End Reasons • Workforce Administration, Job Information, Contract Administration, Define Contract End Reason BEL	Define the reasons that are associated with event codes by adding or updating employment termination reason codes. First define contract termination event types.
Statute Table	STATUTE_TBL_BEL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data BEL, Statutes	Set up and maintain Belgian employment contract statutes and substatutes, and associate contract types with statutes.
Reduced Charged Table	RED_CHRG_TBL_BEL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data BEL, Reduced Charges	Set up the page that you use to update or add reduced charges job categories. Under Belgian employment law, these are job categories that enable you to pay reduced taxes and premiums on the compensation to workers who hold those jobs.
RSZ Category Table	CONTR_RSZS_BEL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data BEL, RSZ Categories	Link contract statutes to *Rijksdienst Sociale Zekerheid* (RSZ) categories.
Contract Ending	CONTRACT_END_BEL	Workforce Administration, Job Information, Contract Administration, Terminate Contract BEL	Record information that is necessary for terminating a Belgian worker.
Contract Replacement	CONTRACT_REPL_BEL	Workforce Administration, Job Information, Contract Administration, Replace Contract BEL	Enter the person who replaces the worker in the employment contract.

Entering Codes for Events and Conditions that Result in Terminating Employment Contracts

Access the End Contract Type - BEL page.



End Contract Type - BEL page

The end contract type codes can cover a wide range of events, including the employee's death, a voluntary or involuntary separation from your organization caused by retirement or relocation, or promotion into another job that has a different employment contract associated with it.

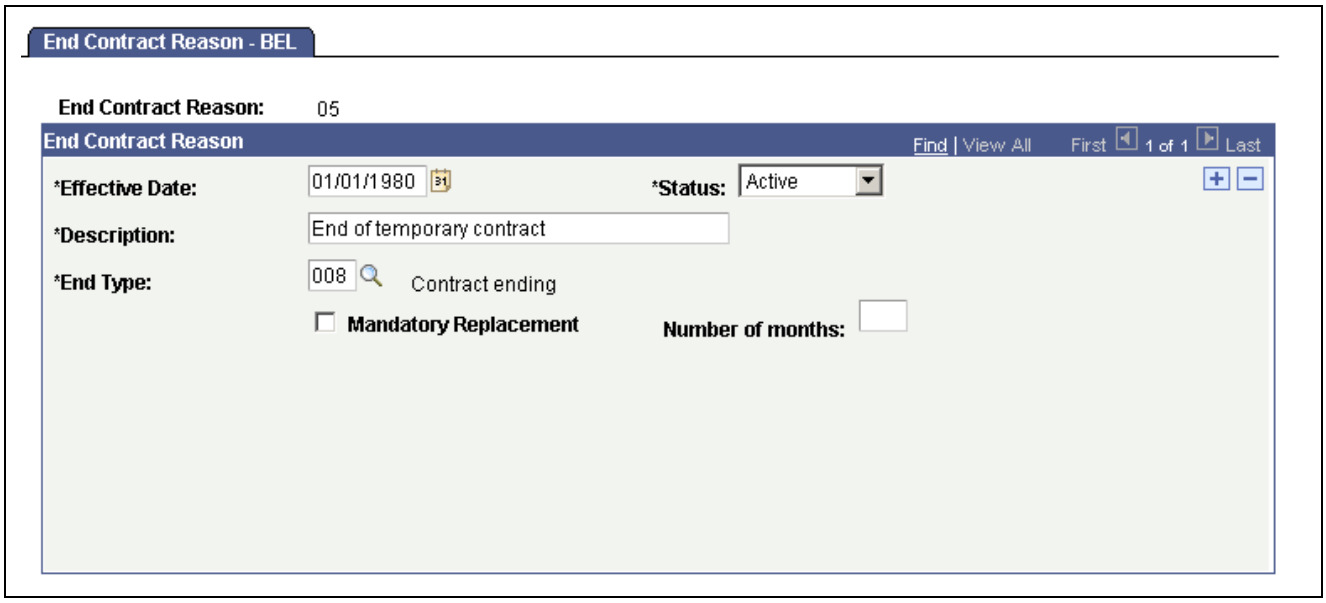
Mandatory Replacement Select if the reason for ending an employment contract with one employee requires mandatory replacement of the former worker with another worker in the same employment contract.

Number of months If you selected Mandatory Replacement, enter (in months) the period of time required to position the replacement.

Note. Belgian employment law mandates these requirements.

Defining Reason Codes for Ending Employment Contracts

Access the End Contract Reason - BEL page.



End Contract Reason - BEL page

End Type Select an end type from the list of end contract type codes that were entered on the End Contract Type page.

Note. If you move out of the End Type field, and then decide to change the end type code, clear and reenter the Mandatory Replacement and Number of months fields.

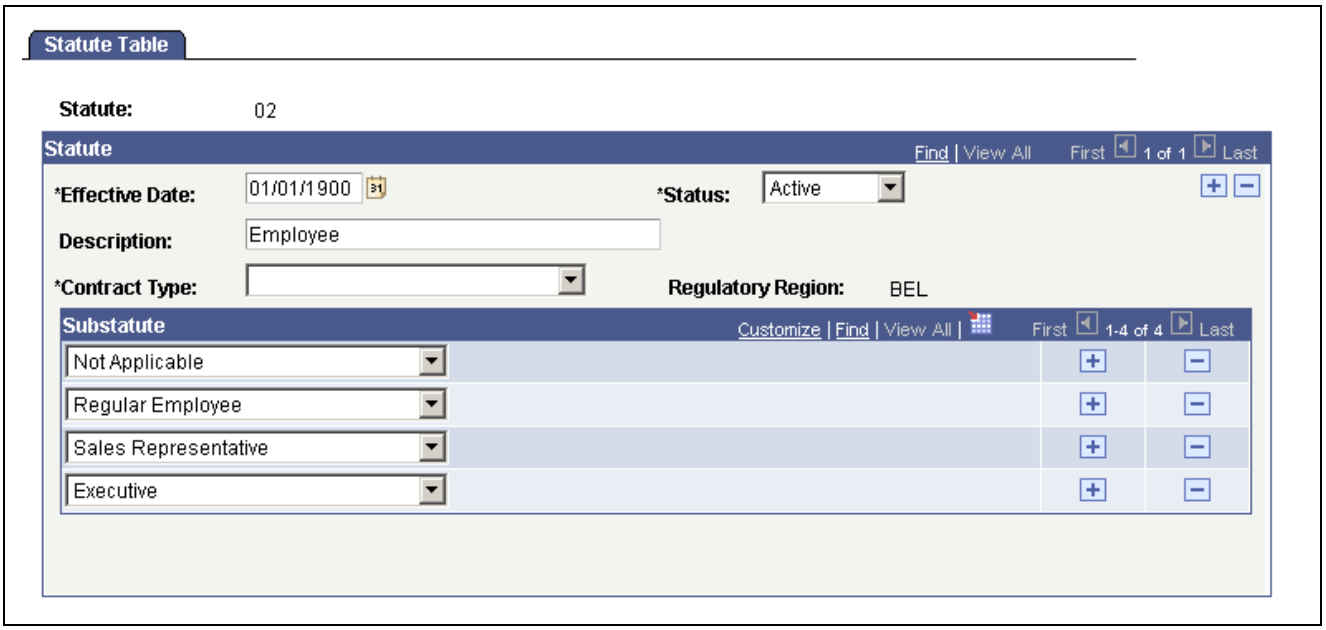
Mandatory Replacement and **Number of months** If you selected an end type that requires mandatory replacement, when you move out of the End Type field, the system automatically selects this check box. The system then enters the number of months that you have to replace the current employee with another employee in this contract.

If you didn't select an end type associated with mandatory replacement information, indicate if the reason for ending an employment contract with one employee requires mandatory replacement of the former worker with another worker in the same employment contract. Then enter the number of months that can pass before you have to find the replacement employee.

Note. Belgian employment law mandates these requirements.

Setting Up Belgian Employment Contract Statutes for Claeys Calculations

Access the Statute Table page.



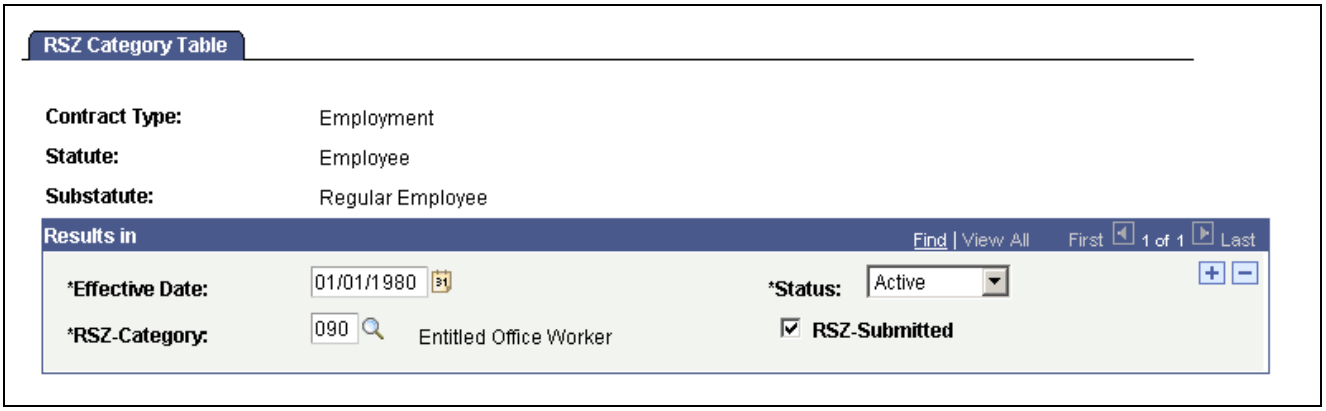
Statute Table page

Contract Type Select a contract type for the statute. Values are *Employment, Member of the professions, Non applicable,* and *Self Employed.*

Substatute Select the statute code with which the system should associate this substatute code.

Linking Contract Statutes to RSZ Categories

Access the RSZ Category Table page.



RSZ Category Table page

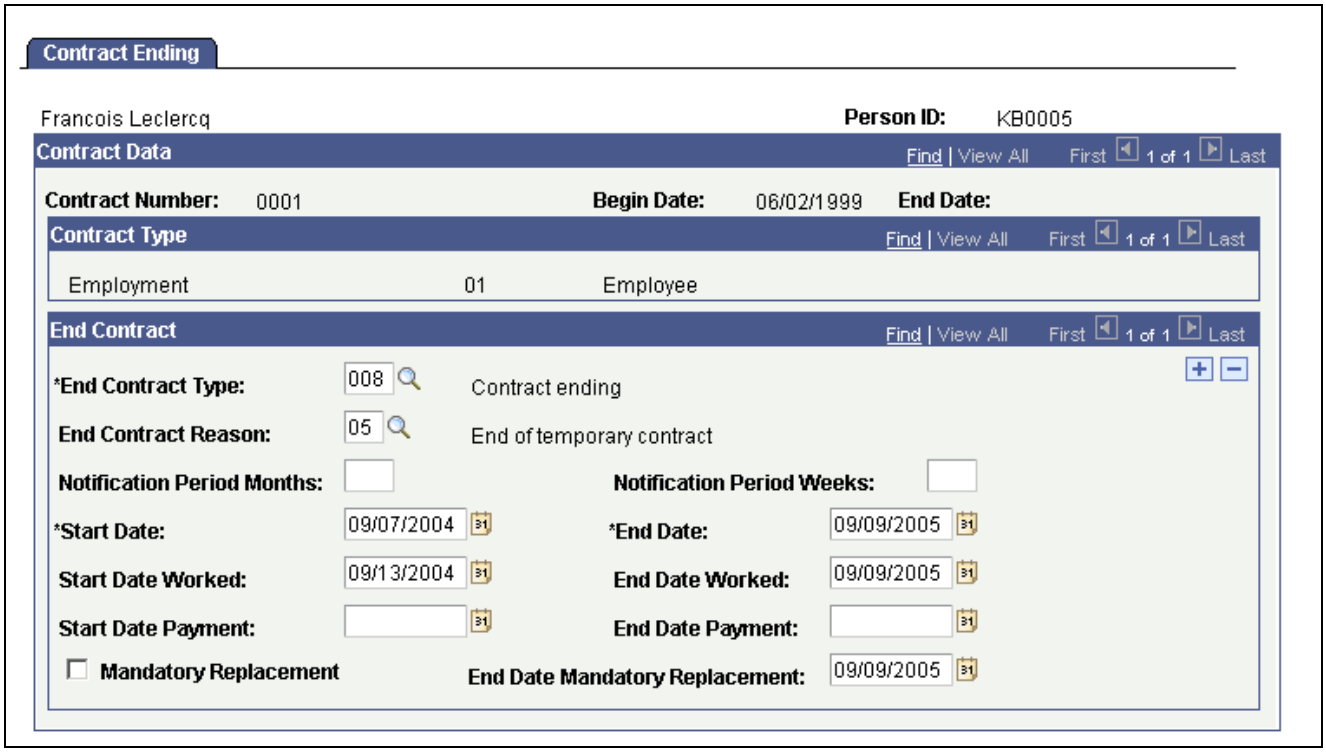
Use the government-defined RSZ categories to maintain social security records for your Belgian employees. Associate each combination of contract type, statute, and substatute with an RSZ category for Claeys formula calculations.

RSZ-Submitted Select to indicate that the contract is subject to RSZ. Before selecting this check box, determine whether RSZ premiums have to be paid to the Belgian social security system for the pay (wage or reimbursement) that is associated with this contract.

RSZ-Category Select an RSZ category from the list.

Recording Information that Is Necessary for Terminating a Belgian Worker

Access the Contract Ending page.



Contract Ending page

Use this page to:

- Specify that the worker's employment contract has ended, and the reason that your organization has chosen to end the contract.
- Set up and track the worker's termination notification period.
- Track the worker's replacement if a replacement is mandatory based on the contract type.

End Contract Type Select a valid end contract type (such as death, disability, or early retirement with mandatory replacement).

End Contract Reason Select an end contract reason (such as disrupted employee relations, family reasons, a company specific program, or contract expiration).

Notification Period Months Enter the number of months of notice that the employee must be given prior to the contract end date. The notification period that you enter here impacts Claeys calculations in the Create Notification component. If you enter an amount here and move out of the field, the Notification Period Weeks option becomes display-only.

Notification Period Weeks Enter the number of weeks of notice that the employee must be given prior to the contract end date. The notification period that you enter here impacts Claeys calculations in the Create Notification component.

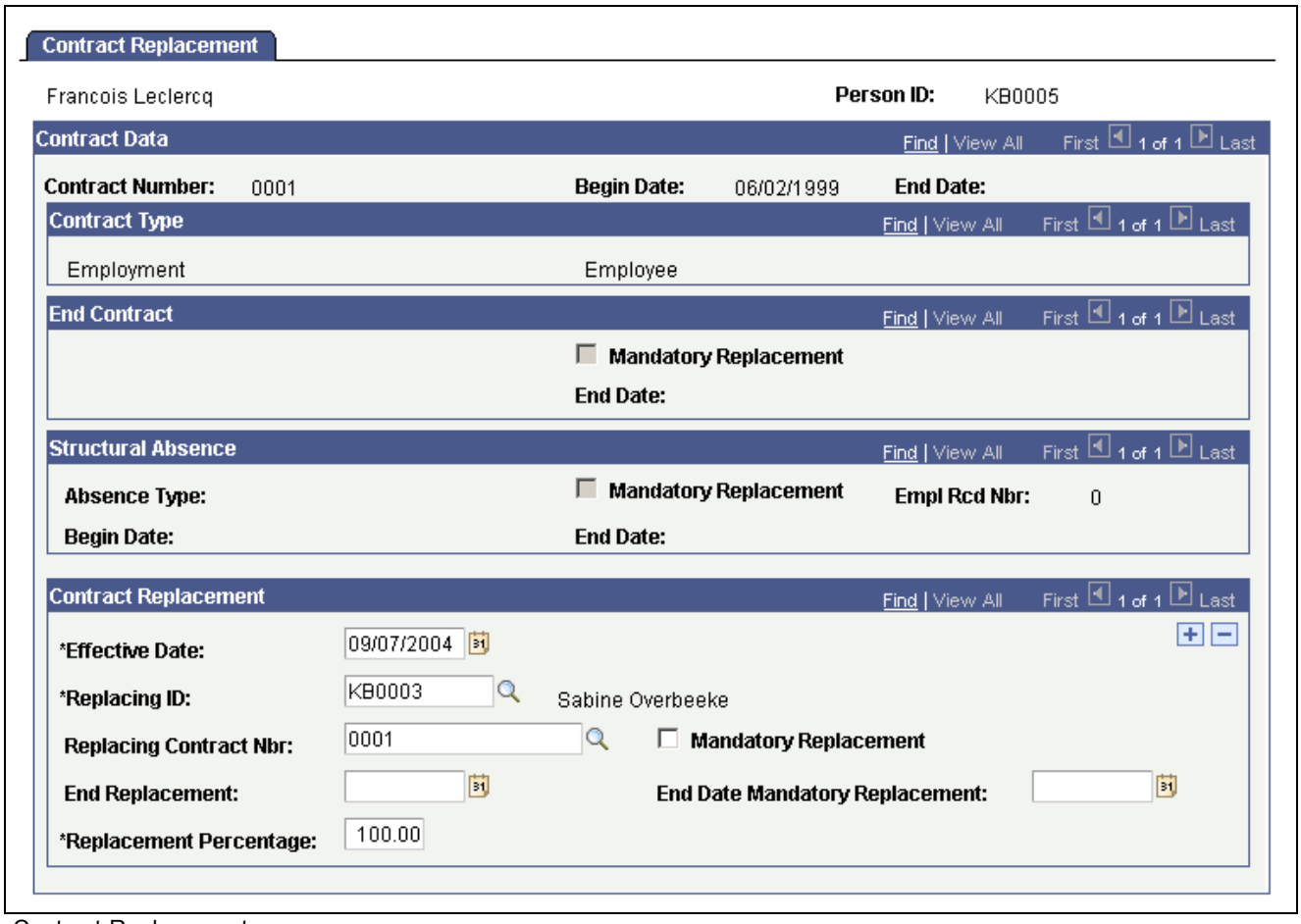
	If you enter an amount here and move out of the field, the system makes the Notification Period Months option display-only.
Start Date and **End Date**	Enter the date that the notification period begins, and the date on which the notification period ends and the employment contract terminates.
Start Date Worked	Record the employee's start date for this job contract, which should be the same as the date that you record for a job change in the worker's job record.
End Date Worked	Enter the employee's last working day on this job contract, which should be the same as the date that you record for a job change in the worker's job record—whether the worker is terminating with your company or leaving one job contract to move into another.
Start Date Payment and **End Date Payment**	Track the start and end payment dates, which the system stores and uses for payroll.
Mandatory Replacement	If the end contract type that you selected requires mandatory replacement, the system automatically selects this check box and makes it display-only. Specify whether an end contract type requires replacement on the End Contract Type - BEL page.
End Date Mandatory Replacement	If the end contract type requires mandatory replacement, the system calculates the end date of the mandatory replacement period based on the end date on which the employee is terminated. It also calculates the number of months that you specified on the End Employment Terms table (CNT_END_TBL_BEL) as the length of the replacement period.

See Also

Chapter 8, "(BEL) Entering Additional Data for Belgian Workers," Defining Reason Codes for Ending Employment Contracts, page 245

Entering a Replacement Worker for the Employment Contract

Access the Contract Replacement page.



Contract Replacement page

Replacing ID Select the ID of the employee who replaces the terminated employee in this contract. The system displays all employees who have been tagged as replacement employees for Belgian employment contracts in your human resources system. Select any applicant or employee with employment terms. If you want to hire someone as a replacing employee, you must create employment terms for that person first.

Replacing Contract Nbr (replacing contract number) Select the number for this contract, based on the replacing employee ID that you selected.

Mandatory Replacement Select to indicate that mandatory replacement is required.

End Replacement If you selected Mandatory Replacement, enter the date for the end replacement. You may want to track this date if you have an earlier than expected end date for a fixed term employment contract.

End Date Mandatory Replacement Enter the end date for mandatory replacement.

Preparing for Severance Calculations

Employers in Belgium and organizations that employ a Belgian workforce are required to track worker information that is used in the Claeys formula calculation. This calculation determines the amount of severance compensation that your organization must pay a worker if you terminate employment. The formula considers factors such as the employee's seniority, age, and annual compensation (including salary, vacation pay, and so on) to determine your organization's liability to the employee.

This section provides an overview of how Claeys calculates severance and of how to prepare for the Claeys calculation, and discusses how to:

- Track additional seniority.
- Enter protected job leave information.

Understanding How Claeys Calculates Severance

The Claeys formula calculates months of severance salary that are owed to an employee as follows:

0.89 × (seniority) + 0.08 × (employee's age) + 0.0013 × [yearly compensation in EUR divided by 1000 × (reference index divided by actual index)] - 2 = notification period, or months of severance salary that is owed to the employee.

For example, an employee with 13 years of seniority with a company, who is 38 years of age, and who is making 82.500 EUR is entitled to 13 months of severance pay. The calculation works as follows:

0.89 × 13 = 11.57 (seniority factor)

0.08 × 38 = 3.04 (age factor)

0.0013 × (82,500 / 1000) × (125.30 / 126.00) = .1066 (compensation factor)

11.57 (seniority factor) + 3.04 (age factor) + .1066 (compensation factor) - 2 = 13 months of severance

Note. The value for compensation is the employee's yearly compensation. This amount is based on the employee's monthly wage multiplied by the factor that is designated in the company table for your organization. The Belgian regulated factor amount is approximately 13.9.

How to Prepare for the Claeys Calculation

Preparing for the Claeys employment compensation calculation in PeopleSoft Enterprise Human Resources involves:

- Establishing default company level information that is used for Claeys formula employee compensation calculations on the Company table (COMPANY_TBL), including factoring information defaults for calculating worker seniority, age, compensation, and so on.

  You can override this data at the employee level in the Create Notification component, where you perform the Claeys calculation for a specific worker.
- Entering and maintaining information about the employee's:
  - Seniority with your organization (stored in the PER_ORG_ASGN table).
  - Age (stored in the PERSON table).
  - Compensation (stored in the JOB table).

- Entering and maintaining employment contract information for the employee on the Contract Data pages (stored in the CONTRACT_DATA table).
- Entering and maintaining end employment terms information regarding required notification periods for workers whom your company may terminate (stored in the CNT_END_TBL_BEL table).
- Maintaining additional information that is used to record Belgian seniority, including protected job leave information (stored in the SENIORITY_BEL table).

See Also

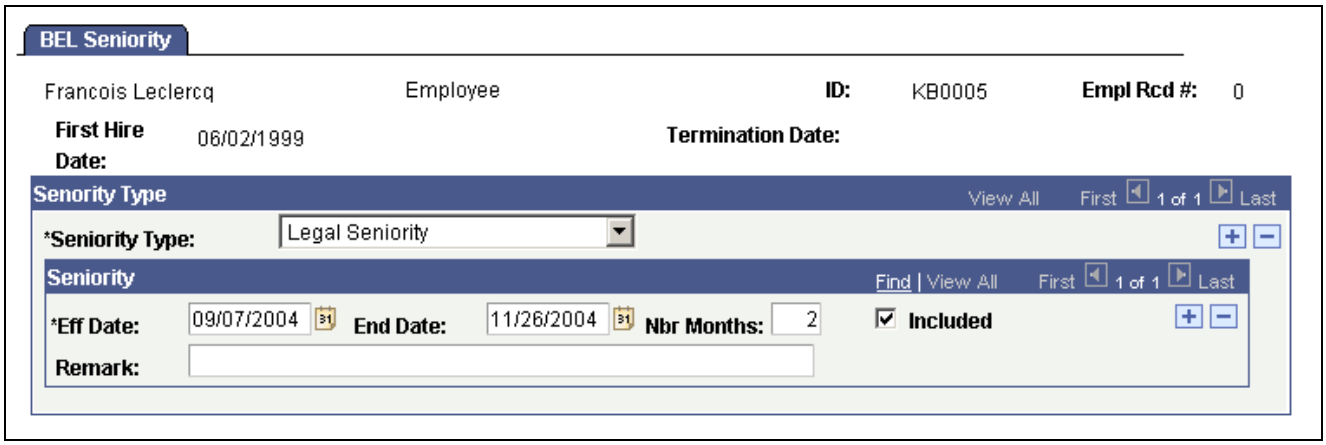
Chapter 8, "(BEL) Entering Additional Data for Belgian Workers," Performing the Claeys Calculation, page 254

Pages Used to Prepare for Severance Calculations

Page Name	Object Name	Navigation	Usage
BEL Seniority	SENIORITY_BEL	Workforce Administration, Collective Processes, Administration BEL, Identify Seniority	Track additional seniority for an employee; the seniority impacts the Claeys calculation that you perform in the Create Notification component.
Protection	PROTECT_BEL	Workforce Administration, Collective Processes, Administration BEL, Create Protection	Enter protected job leave information for a Belgian employee. You can assign protection to employees who are union delegates, who take part in elections, or who have other qualifying characteristics.

Tracking Additional Seniority

Access the BEL Seniority page.



BEL Seniority page

The system uses the seniority information for the employee recorded on this page when performing Claeys formula processing to determine the employee's months of service. If no information about service months is available on the Seniority page for an employee, the system references the employee's service months calculation on the Job Data - Job Information page.

For example, seniority in another organization may or may not count towards an employee's company seniority, depending on your own organization's business rules, but it does count towards legal seniority that impacts the Claeys calculation. This distinction is particularly important in the case of mergers between organizations where you decide if the seniority of employees from one organization is recognized by the other organization and, if so, to what extent. Using this page, you can specify the number of months of seniority that workers can carry over to your organization from their former companies.

Seniority Type Select the seniority type method that you want to use to determine this employee's seniority in your organization. Values are:

Company Seniority: When figuring seniority, this method doesn't account for periods of leave time that employees may use while remaining in a job, pension calculation issues, recognized service time, and so on.

The system does *not* take into account company seniority months when performing the Claeys calculation for an employee. If you enter a period for company seniority, the Claeys calculation uses only the months of seniority based on the employee's service time on their Job Data record.

Legal Seniority: The system accounts for this seniority amount when calculating the Claeys formula, which is used to calculate base pay for Belgian employees.

If you enter a period for legal seniority, the Claeys calculation takes the number of service months displayed in the Nbr Months field and adds it to the months of service from the employee's Job Data record, and displays the sum of the two amounts on the Create Notification - Base page.

Eff Date (effective date) Enter the effective date to record the beginning of the employee's additional seniority period. The system supplies a default date, usually today's date, which you can modify to reflect the additional seniority period.

End Date Enter the end date for the seniority period.

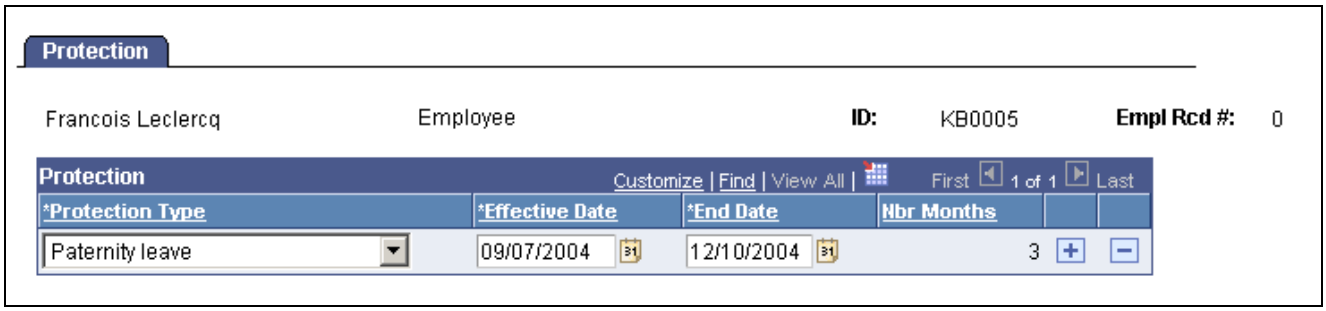
Nbr Months (number of months) When you move out of the End Date field, the system calculates the number of months of seniority. The system doesn't calculate partial months. If an employee's seniority period is 100 months and 16 days, the system calculates *100* months of seniority.

Included Select to ensure that the system adds the months of seniority that you entered here to the employee's seniority based on their Job record (JOB) when it performs the Claeys calculation. If you clear this check box and enter *Legal Seniority* months, the system *subtracts* the seniority period from the employee's seniority when it calculates the Claeys formula.

Remark Enter relevant remarks about the additional seniority that you are tracking.

Entering Protected Job Leave Information

Access the Protection page.



Protection page

Protection Type Select a protection type to indicate why this leave of absence is protected.

Note. Belgian employment law mandates these protection types.

End Date Enter the date on which the employee will return to work.

Nbr Months (Number of Months) When you move out of the End Date field, the system calculates the duration of the protected absence.

Note. The system calculates only the absence period to the nearest month and doesn't allow for partial months. If the protected leave duration period is 45 days, the system indicates that the employee's absence covers *one* month only.

Note. The system does *not* take into account protection months when it calculates Claeys formula seniority, in part because protection isn't limited to absences from work that might impact seniority months.

Performing the Claeys Calculation

After you've hired a Belgian employee into your human resources system and established employment contract terms, end employment terms, seniority, and protected leave (protection) information, you can perform the Claeys calculation to determine your potential severance pay liability if you were to terminate the employee.

This section discusses how to:

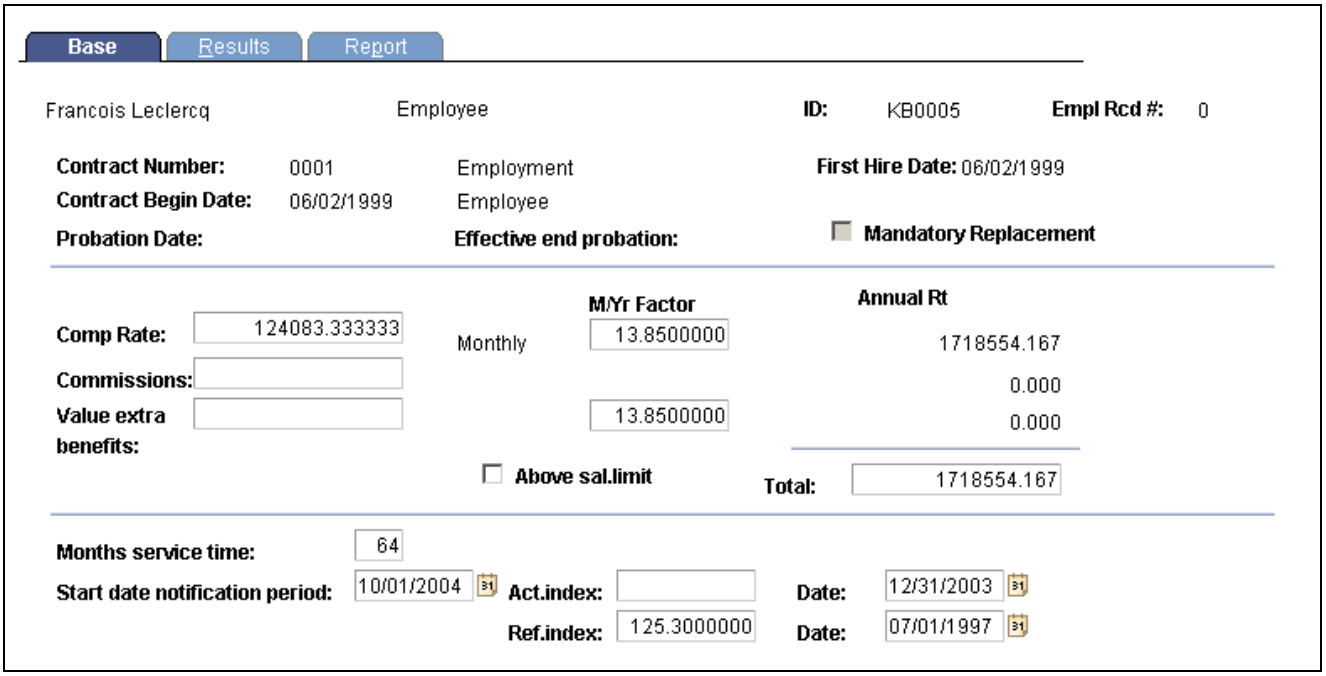
- Review Claeys calculation variables.
- Calculate the severance amount.
- Run the Notification report.

Pages Used to Perform the Claeys Calculation

Page Name	Object Name	Navigation	Usage
Base	NOTIF_CALC_BEL	Workforce Administration, Collective Processes, Administration BEL, Create Notification, Base	Review and set Claeys calculation variables, including the employee's compensation, default factor information, and months of service.
Results	NOTIF_CALC2_BEL	Workforce Administration, Collective Processes, Administration BEL, Create Notification, Results	Calculate the severance amount.
Report	RUNCTL_PER066_BEL	Workforce Administration, Collective Processes, Administration BEL, Create Notification, Report	Run the Notifications report (PER066BE).

Reviewing Claeys Calculation Variables

Access the Create Notification - Base page.



Create Notification - Base page

The system displays the employee's name, employee ID, and the employment record number for your reference. This information comes from the person's personal data record.

The system displays employment and end employment contract terms information for the employee that you entered on the Contract Data and BEL Contract Ending pages. The system displays the person's hire date from the Job Data record and indicates whether, according to the end employment terms for the worker, the contract requires mandatory replacement.

Determining the Employee's Base Compensation Amount *(Jaarloon)*

Comp Rate (compensation rate) The system calculates the employee's monthly compensation rate based on the employee's compensation rate information on the Job Data - Compensation page and displays it here. Adjust the rate information as necessary. The system uses this amount when determining the employee's monthly pay variable for the Claeys calculation.

M/Yr Factor (month/year factor) The system multiplies the month base amount by the month/year factor of *13.85000* to calculate a value for the employee's Annual Rt income amount field. The default factor displayed here comes from the default employee compensation factors that you entered on the Company table. The Belgian government determines this factor amount, but you can override the default here if the factor amount changes.

Commissions Enter any commissions amount that the system should add to the employee's month base as part of the Claeys calculation income amount.

Value Extra Benefits Add value extra benefits amounts, including other components of nonbase pay, such as any benefits that the employee receives (for example, salary, vacation pay, 13th month, meal checks, and so on). The system multiplies the value extra benefits amount by the value extra month/year factor of *13.85000* to calculate the employee's yearly extra income amount.

Total The system displays the total compensation amount (*jaarloon*) based on the year base, the commission, and extra benefit results. Adjust the system calculated total as necessary.

Understanding the Above Salary Limit Setting

Above sal. limit (above salary limit) The system also indicates if the employee's compensation total is above salary limit by accounting for the contract type. Select this check box to override the factor values on the Create Notification - Results page.

To change the salary limit setting, ensure that the notification period start date falls *after* the effective end probation date that appears with the employee's contract information at the top of the page. In this case, the system fixes the salary limit for a longer period (the system uses the factors in the Claeys Defaults group box on the Create Notification - Results page to calculate the notification period, and makes the factors available for entry).

If the date is *prior* to the effective end probation date, you can't change the salary limit setting.

Note. The compensation currency on the Create Notification - Base and Create Notification -Results pages is the same as the employee's job currency that is set on the employee's Job record (JOB).

Determining the Employee's Seniority

Months service time The system calculates and displays the employee's number of months service time. The system determines service month information by considering both the employee's service months information on the Job Information page (JOB_DATA) and the number of months service time on the Seniority page (SENIORITY_BEL) *if* the seniority type is set to *Legal Seniority.* The

system adds the two seniority amounts and displays them as the months service time amount.

The system doesn't consider partial months in this calculation and doesn't round up. If the employee's service time is 9 months, 16 days, the system displays *9* as the employee's months service time. Adjust the months service time as necessary.

Note. If you enter seniority information on the Seniority page for an employee, and the seniority type is set to *Company Seniority,* the system uses the months of seniority calculation on the Job Information page to set the number of months service time on the Create Notification - Base page.

Start date notification period

Set the start date notification period for the employee's termination notification to the first day of the *next* month if you're not performing the Claeys calculation for this employee on the first day of the *current* month. The default value is the first day of the month following the effective date that appears with the contract information at the top of the page.

For example, if you start your Claeys calculation for an employee on April 14, the system enters a start date for the notification period of May 1. Override this date as necessary.

Note. The start date notification period that appears on the Base page affects the way the system performs the Claeys calculation on the Results page. If the start date notification period begins before the effective end probation date on the Base page, the system uses a notification period of *Days* on the Results page when you click the Calculation button. If you enter a start date notification period that begins after the employee's effective end probation date, the system uses a notification period of *Days, Weeks,* or *Months,* depending on the statute information for that employee on the Contract Data - Contract Type/Clauses page, as follows. If the employee is classified as a *Worker* on the Employment Terms Type page, the notification period appears in *Weeks.* The classification of *Employee* results in a notification period of *Months.* The classification of *Not Applicable* results in a notification period of *Days.*

Act. Index (actual index)

The actual index if one is assigned for this company in the Company table. The actual index is a monthly reference number to be held against the reference index number.

The actual index is used in the Claeys calculation to calculate the notification period term that is related to the yearly base on the Create Notification - Results page:

(Yearly base salary / 1000) × (factor yearly base / actual index) × correction factor)

Date

The last day of the year preceding the year in which you're performing the Claeys calculation for an employee (in this case, December 31, 1997). This date is for your reference only, and isn't saved when you save the page.

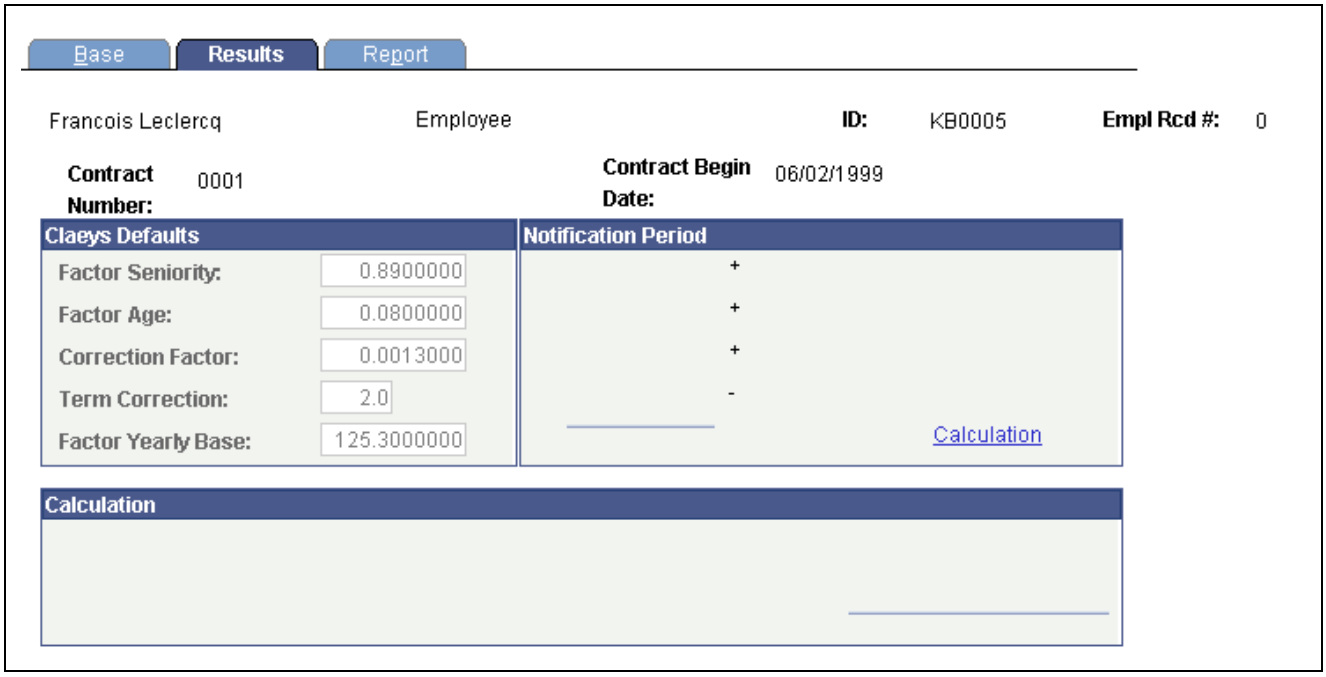
Ref. Index (reference index)

You can also update the reference index or accept the system default that is based on the factor yearly base index that is set up on the Company Table-Default Settings, Claeys Defaults for this company. The reference index is a yearly reference amount to be compared against the actual index amount.

Date The system also displays the reference index date (in this case, July 1, 1997). The system sets this date to the beginning of the last half of the year prior to the year in which you're performing the Claeys calculation. This date is for your reference only, and isn't saved when you save the page. The system doesn't use the reference index as part of the Claeys calculation.

Calculating the Severance Amount

Access the Create Notification - Results page.



Create Notification - Results page

The system displays the Claeys defaults for Factor Seniority, Factor Age, Correction Factor, Term Correction, and Factor Yearly Base from the Company table for this employee's company. You assigned the company on the Job Data - Work Location page. Change these factors at the employee level on this page *only* if you selected the Above sal. limit check box on the Create Notification - Base page.

Note. The system uses these Claeys default factors as part of the Claeys calculation only when the Above sal. limit check box is selected on the Create Notification - Base page.

When you first open this page, the Notification Period and Calculation group boxes are empty. This is where the system displays the results of the Claeys calculation for this employee after you perform the calculation by selecting the Calculation link.

The system displays the calculated notification period for this employee in the Calculation group box and shows how it calculated the notification period in the Notification period group box.

How the System Calculates the Notification Period

The system calculates the notification period in one of two ways depending on whether the employee's yearly base salary is above the salary limit:

- If the employee's yearly base salary is *above the salary limit* (Sal limit check box selected), the notification period that appears in the Calculation group box is based on the calculations that appear in the Notification Period group box.

  The system calculates the notification period based on the employee's seniority, age, and compensation:

  Seniority term = (months service time / 12) × factor seniority

  Note. For the Seniority Term amount, the system rounds the division by 12 differently for each month.

  Age term = employee's age on notification start date × factor age.

  Compensation term = (base total / 1000) × (factor yearly base / actual index) × correction factor.

  Total notification period = seniority term + age term + compensation term - term correction.

  You can tell if you're using the above salary limit method by the way the page looks when you perform the calculation. If the system used the above salary limit method to determine the notification period, it displays the notification period calculation in the Notification Period group box. The Claeys defaults that appear on the page are also available for entry, though these come from the company defaults for the employee's company and probably shouldn't be changed.

- If the employee's base isn't *above the salary limit,* (the Above sal. limit check box is cleared), the notification period amount is based on the statute, service time, probation end date, and notification start date—without accounting for any of the Claeys defaults factors that appear on the page. In this case, the system calculates the employee's notification period as follows:

```
If the Statute is "Worker"
if Notification Start Date <= Effective Probation End Date, then Period is "0"
if the Service Time is lower than 240 Months (20 years) the Period is "4"
else the Period is "8"
If the Statute is "Employee"
if Notification Start Date <= Effective Probation End Date, then Period is "7"
else the Period is (((Service Time / 12) / 5) +1) ×3 ⇒
(each division is truncated with zero decimals)
Else the Period is "0"
```

  The unit of time for the notification period information is based on the employee's statute type that you established on the Contract Data - Contract Type/Clauses page (CONTRACT2) as defined on the Statute Table page (STATUTE_TBL_BEL). When the statute type is set to *Worker,* the period unit is in *Weeks.* When the statute is for an *Employee,* then the period unit is in *Months.* If the statute is anything other than worker or employee, the period unit is *Days.* Whenever the notification start date falls within the probation period, the unit of time is always *Days.*

Understanding Protection Period Information

The system compares the end date for any of this employee's qualifying protection periods that you recorded on the Protection table (PROTECTION_BEL) to the notification start date recorded on the Belgian Notification Calculation table (NOTIF_CALC_BEL) to determine the value for the Protection period field. This method of comparison ensures that the employer respects the employee's protection rights.

Note. The protection period isn't included in the Claeys calculation process.

The system also displays the Protection End Date field, which is the *actual* end date of the protection period if there is any protected leave time entered for this employee on the Protection page. This is the date that you set as the end date for any qualifying protection period that you specified on the Protection page.

Working with the End Compensation Amount

The End compensation field displays the resulting Claeys calculation amount that you owe this employee as severance pay, as calculated by the system.

Depending on the notification period unit of time, the system calculates the end compensation by dividing the yearly base total (displayed on the Create Notification, Base page) by 12 if the notification period is months, 52 if weeks, or 365 if days. The result is then multiplied by the notification period amount to arrive at the end compensation amount. For example, the end compensation amount calculation for Josef Timmermans is:

(2391248.62 / 12) × 4 = 797082.87

Any amount that you enter in the Revenue compensation field is added to the total severance amount for the employee.

If you need to change the notification data and rerun the calculation, make your changes and click the Calculation link again. The system clears the old results and calculates the Claeys amount based on your changes.

Warning! The system does not save this data. You must run the Notification report to maintain records for each calculation.

Running the Notification Report

Access the Create Notification - Report page.

After completing the Claeys calculation, run the termination notification report. The report page displays the employee's ID and record number together with the notification period that is calculated by the Claeys formula.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," (BEL) Entering Default Information and Salary Factors

Generating DIMONA Notifications

This section provides an overview of DIMONA notifications and discusses how to:

- Create DIMONA notifications.
- Review DIMONA notifications.

Understanding DIMONA Notifications

The Belgian E-government Social Security plan requires companies to report social insurance data for workers employed under Belgium regulations. DIMONA notifications contain the required data.

The Create DIMONA Notification process (HRBEL_DIM_AE) generates DIMONA notifications as flat files. The PeopleSoft system supports employee hire and employee termination DIMONA notifications, including corresponding updates and cancellations. You can generate notifications for a single employee, for a company, or for a business unit.

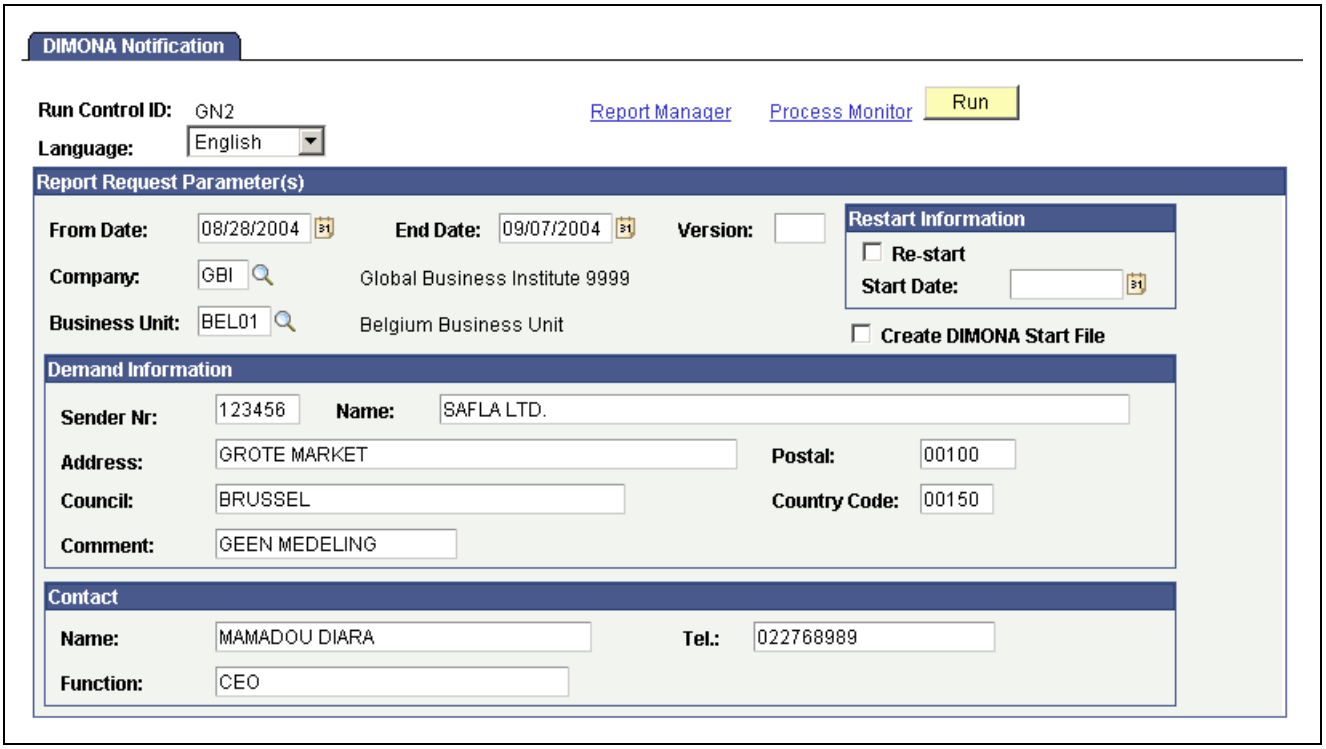
After you have generated flat files containing the notifications, you can transfer the flat files to the National Office for Social Security (NOSS), known as RSZ or ONSS in Belgium, using the NOSS file transfer protocol server. After you transfer data to the NOSS, you can consult and update employee data by using the NOSS database system.

Pages Used to Generate DIMONA Notifications

Page Name	Object Name	Navigation	Usage
DIMONA Notification	HR_DIMONA_CNTL_BEL	Workforce Administration, Collective Processes, Administration BEL, Create DIMONA Notification	Create DIMONA notifications.
Review Notification	HR_DIMONA_RVW_BEL	Workforce Administration, Collective Processes, Administration BEL, Review DIMONA Notification	Review DIMONA notifications.

Creating DIMONA Notifications

Access the DIMONA Notification page.



DIMONA Notification page

Report Request Parameters

From Date and **End Date** Enter begin and end dates for the period to include in the DIMONA notification.

Version Enter the DIMONA version number (from the first page of the Glossarium) used when creating the DIMONA file.

Company and **Business Unit** Enter the company or business unit for which to create a DIMONA notification.

Create DIMONA Start File Select to indicate that this is the initial DIMONA creation. When selected, the DIMONA file contains all employees and workers.

Restart Information

Re-start Select to indicate that an existing notification needs to be recreated. The system processes only those notifications that have been reviewed and set to *Re-do* on the Review Notification page.

Start Date Select the process date of the original notification that needs to be recreated.

Demand Information

Enter information about the person who is sending the notification.

Sender Nr (sender number) Enter the number that the NOSS assigned to the person who is sending the notification.

Council Enter the sender's city.

Country Code Enter the sender's National Institute for Statistics (*Nationaal Instituut voor de Statistiek*) (NIS) country code.

Contact

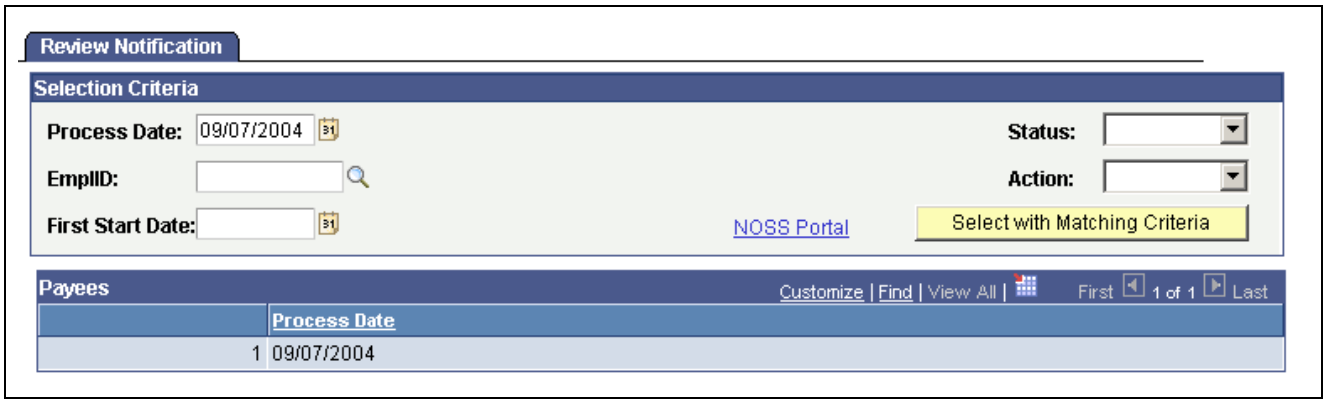
Name, Function, and **Tel.** (telephone number) Enter the name, function, and telephone number of the person whom the NOSS can contact in case there is a problem with the file.

HRBEL_DIM_AE Process

The HRBEL_DIM_AE process selects all employees that have been hired or terminated, based on personal and job data, and creates a notification for them. The process creates notification flat files according to the NOSS standard, and names the file according to NOSS naming conventions.

Reviewing DIMONA Notifications

Access the Review Notification page.



Review Notification page

Process Date (Optional) Enter the date that the notification was processed.

EmplID	(Optional) Enter the employee ID of the notification to review.
Hire Date	(Optional) Enter the hire date of the notification to review.
NOSS Portal	Click to access the NOSS website. From this page, you can log on to the NOSS web server to check the latest information about the DIMONA notification or other information about Belgian social security.
Status	(Optional) Select the status of the notification to review: *Cancel, Delete, Done,* or *Re-do.*
Action	(Optional) Select the action reported by the notification: *Cancel, Hire, Terminate,* or *Update.*
Select with Matching Criteria	Click to populate the Payees group box with information on the notifications that match your criteria.
DIMONA Nr (DIMONA number)	Enter the notification number that is assigned by NOSS.

Update and Termination Notifications

Using this page and the DIMONA Notification page, you can create update and termination notifications.

To create single employee update and termination notifications:

1. Access the Review Notification page.
2. Enter the process date and the employee ID.
3. Click Select with Matching Criteria.
4. Set the notification action to *Update* or *Terminate.*
5. Set the notification status to *Re-do.*
6. Save the page.
7. Access the DIMONA Notification page.
8. Select the Re-start check box and enter the process date in the Start Date field.
9. Run the HRBEL_DIM_AE process.

To create update and termination notifications for more than one employee, follow the same steps as for a single employee notification, except:

- In step 2, enter the process date and any additional criteria.
- Perform steps 4 and 5 for all employees to include in the notification.

Running the Social Report

This section explains how to generate the Belgian Social report.

Page Used to Run the Social Report

Page Name	Object Name	Navigation	Usage
Social Report	RUNCTL_PER067_BEL	Workforce Administration, Workforce Reports, Social Report BEL	Run the Social Report (PER067BEL), which reports a variety of employer and employee information that is required by the government.

CHAPTER 9

Managing Country-Specific Workforce Data

This chapter discusses how to:

- (CAN) Provide additional information for Canadian employees.
- (CHE) Run the Company Statistics report.
- (ESP) Generate Affiliation to Social Security (AFI) flat files.
- (FRA) Provide additional information for French workers.
- (NLD) Record and report *Wet Stimulering Arbeidsdeelname* (SAMEN) diversity information for Dutch workers.
- (ITA) Record additional hiring data for Italian workers.
- (ITA) Record end of employment information for Italian workers.
- (ITA) Run the Equal Opportunities report.
- (USA) Determine U.S. residency status for foreign nationals.

(CAN) Providing Additional Information for Canadian Employees

There are a few issues that are unique to a Canadian workforce.

Note. While the Ontario Employment Equity Commission (OEEC) no longer requires employees in Ontario to complete workforce surveys, the PeopleSoft system continues to offer Ontario Employment Equity (OEE) reporting functionality.

This section discusses how to:

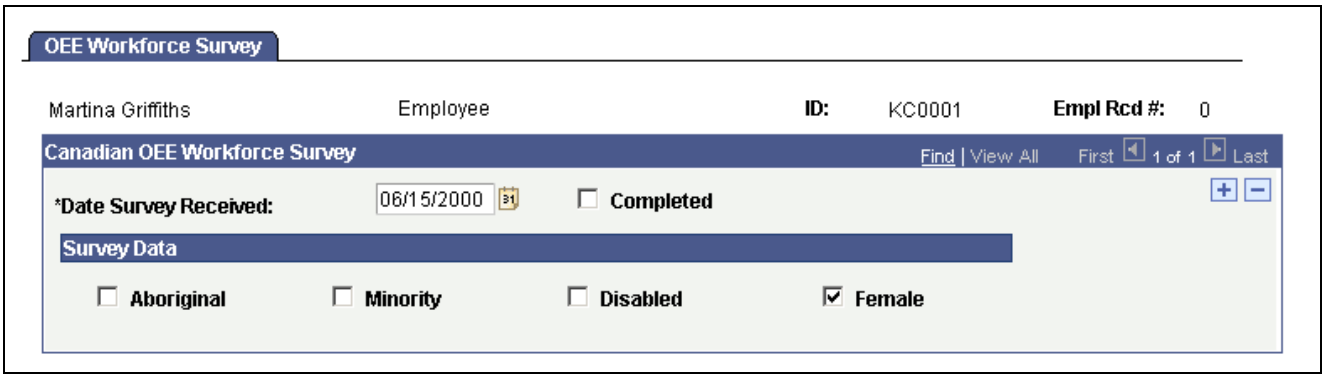
- Enter OEEC workforce survey responses.
- Record employee-level information about official language use.

Pages Used to Provide Additional Information for Canadian Employees

Page Name	Object Name	Navigation	Usage
OEE Workforce Survey	CAN_OEE_SURVEY	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Workforce Survey Result	Enter OEEC workforce survey responses.
Official Languages	PERS_OFFLNG_CAN	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Official Languages	Record employee-level information about the use of official languages. The information stored in this page is used for the Official Languages reports that you submit to the Canadian government, in accordance with the Official Languages Act.
OEE Groups by OCC Group	RUNCTL_FTCANAC	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups by OCC Group Report	Generate the OEE Groups by OCC Group report (PER103CN). The report lists the totals of active employees, within the defined area codes, employed within the date range.
OEE Groups by Employment Type	RUNCTL_FTCANAC	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups by Emplymnt Type Rpt	Generate the OEE Groups by Employment Type report (PER104CN).
OEE Groups/Jobs Filled/Vacated	RUNCTL_FTCANAC	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups/Jobs Filled/Vacated	Generate the OEE Groups by Jobs Filled/Vacatd report (PER106CN), which lists the totals of active employees, within the defined area codes, employed within the date range.
OEE Workforce Survey Stats	RUNCTL_PER105CN	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Workforce Survey Stats	Run the OEE Work Force Survey Stats report (PER105CN). The OEE Work Force Survey Stats report lists the number of surveys received and the numbers that were completed.

Entering OEEC Workforce Survey Responses

Access the OEE Workforce Survey page.



OEE Workforce Survey page

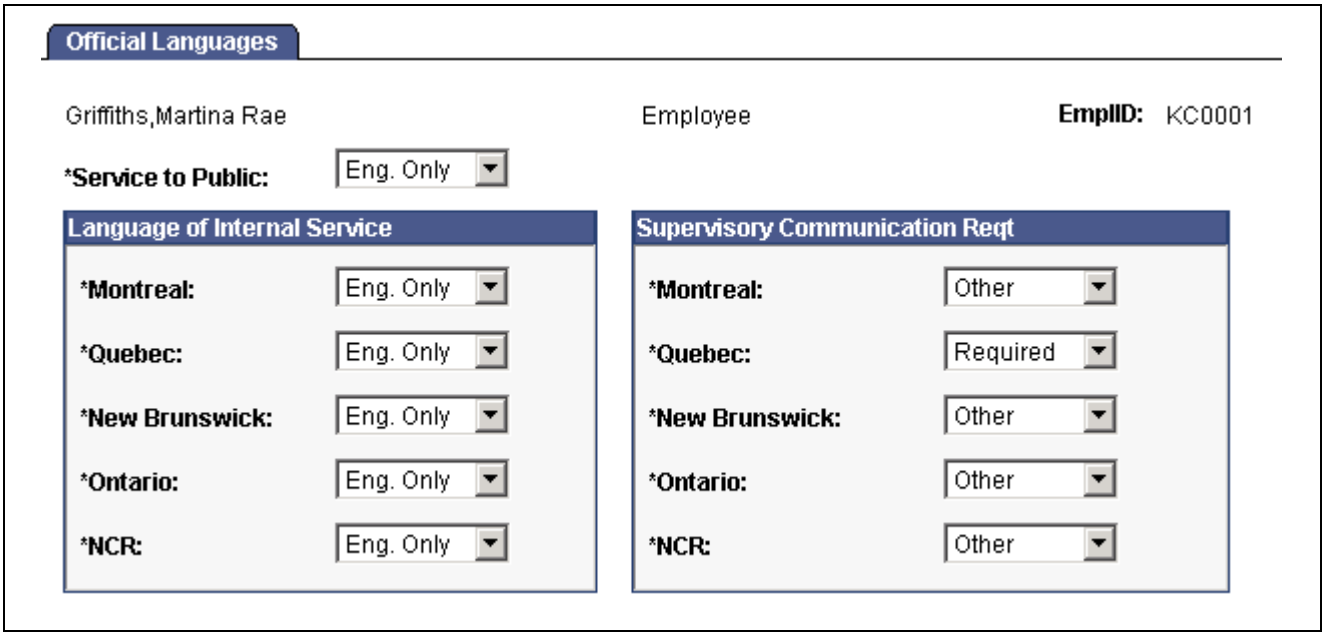
Date Survey Received Enter the date on which the survey was received. The default is the system date, which is usually today's date. Change this date if necessary.

Completed Select to indicate that the survey was completed.

Survey Data Indicate whether the survey respondent is *Aboriginal, Minority, Disabled,* or *Female.*

Recording Employee-Level Information About Official Language Use

Access the Official Languages page.



Official Languages page

Service to Public Indicate which languages the employee uses to provide service to the public.

Language of Internal Service

Montreal, Quebec, New Brunswick, Ontario, and **NCR** (National Capital Region)

For the locations listed in this group box, indicate which languages the employee uses to communicate internally. Select *N/A (not applicable)* for those locations that don't apply.

Supervisory Communication Reqt (Supervisory Communication Required)

Montreal, Quebec, New Brunswick, Ontario, and **NCR** (National Capital Region)

For the locations listed in this group box, indicate which languages the employee requires for supervisory communication. Select *N/A (not applicable)* for those locations that don't apply.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Meet Regulatory Requirements, "(CAN) Meeting Regulatory Requirements for Canada," Running Official Languages Reports

(CHE) Running the Company Statistics Report

The Swiss Federal Department of Statistics requires all Swiss companies to create this report every 10 years.

Page Used to Run the Company Statistics Report

Page Name	Object Name	Navigation	Usage
Company Statistics	RUNCTL_PER001_CHE	Workforce Monitoring, CHE-Company Statistics	Run the Company Statistics report (PER001CH). This report provides information on employee wages, occupations, and other data necessary for the Company Statistics report *(Betriebszaehlung)*.

(ESP) Generating AFI Flat Files

This section provides an overview of the AFI process and discusses how to create an AFI flat file.

Understanding the AFI Process

For Spanish employers, PeopleSoft Enterprise Human Resources includes an AFI process (SOCS_AFI_ESP) for reporting workforce changes to the Social Security General Treasury. The PeopleSoft process simplifies submissions by automatically creating a flat file in the format that is required by the Spanish authorities.

The AFI process generates a flat file that lists changes in workforce, such as hiring, terminations, personal, or job data changes, for a particular period. You run the process for a selected company and *Codigo Cuenta de Cotizacion* (CCC).

There are two ways to select the employees to include in the AFI file:

- Select the types of changes that you want to report.

  The system generates a list of employees who match the criteria, and you can select the employees to include.

- Select specific employee IDs.

  If you know which employees you want to include, enter the employee IDs.

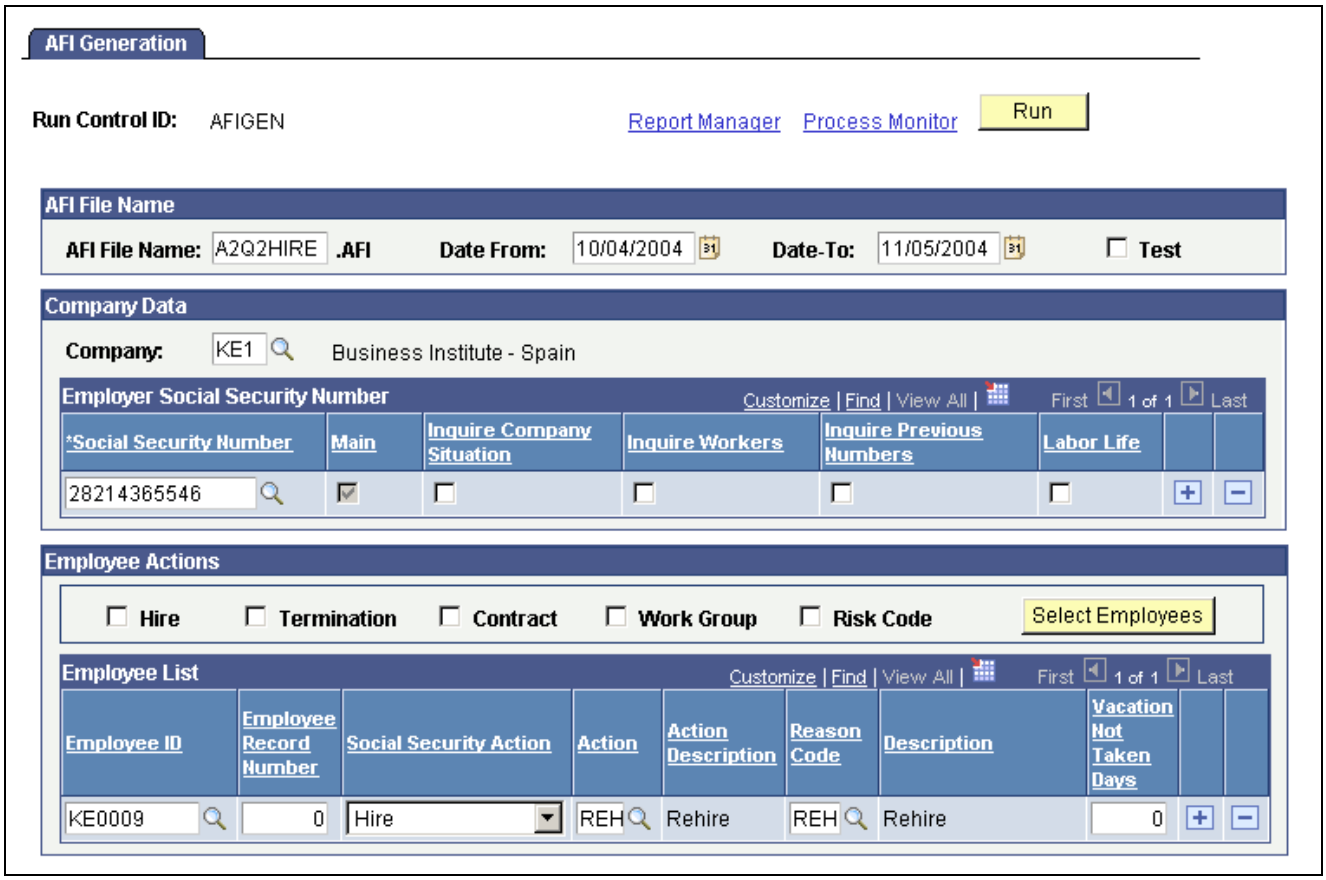
In addition to workforce changes, you can use the AFI process to send information requests to the Social Security General Treasury. Employers use these requests to obtain information about their employees' social security contributions.

Page Used to Generate AFI Flat Files

Page Name	Object Name	Navigation	Usage
AFI Generation	RC_SOCS_AFI_ESP	Workforce Administration, Workforce Reports, AFI Report ESP	Create an AFI flat file for an entire company, for a business unit, or for employees who meet certain criteria.

Creating an AFI Flat File

Access the AFI Generation page.



AFI Generation page

AFI File Name

AFI File Name Enter the name of the file to be created.

Date From and **Date To** Enter the first and last dates of the period for which you want to generate an AFI file.

Test Select to run the process as a test. The process creates a flat file with a test flag that the Social Security General Treasury recognizes.

Company Data

Company Select the company for which to report data.

Employer Social Security Number Select the employer's social security number for which to report data. If you leave this field blank, the extract file contains data for all of the employer's social security numbers.

Main Indicates whether this is the employer's primary social security number.

Inquire Company Situation Select to request the information that the Social Security General Treasury has about the company.

Inquire Workers Select to request the information that the Social Security General Treasury has about current workers in the CCC.

Inquire Previous Numbers Select to request the information that the Social Security General Treasury has about previous movement in the CCC.

Labor Life Select to request the information that the Social Security General Treasury has about labor life in the CCC.

Employee Actions

There are two ways to select employees:

- Select one or more AFI flat file actions and click Select Employees to display a list of employees who have those actions.
- Enter employees by employee ID.

Hire Select to include employees who were hired.

Termination Select to include employees who were terminated.

Contract Select to include employees whose contracts changed.

Work Group Select to include employees whose work group changed.

Risk Code Select to include employees whose risk code changed.

Select Employees Click to select employees whose actions meet your criteria. The system automatically populates the EmplID, Social Security Action, Action, and Reason Code fields for these employees.

Employee Record Number Enter the ID of the employee that you want to include in the AFI flat file. You can delete an employee from the list that was generated when you clicked the Select EE button if you do not want to report information for the employee.

Social Security Action Select the AFI flat file action to report for the employee.

Action Select the internal action code to include in the AFI flat file for the employee.

Reason Code Select the action reason to include in the AFI flat file for the employee.

(FRA) Providing Additional Information for French Workers

This section discusses how to:

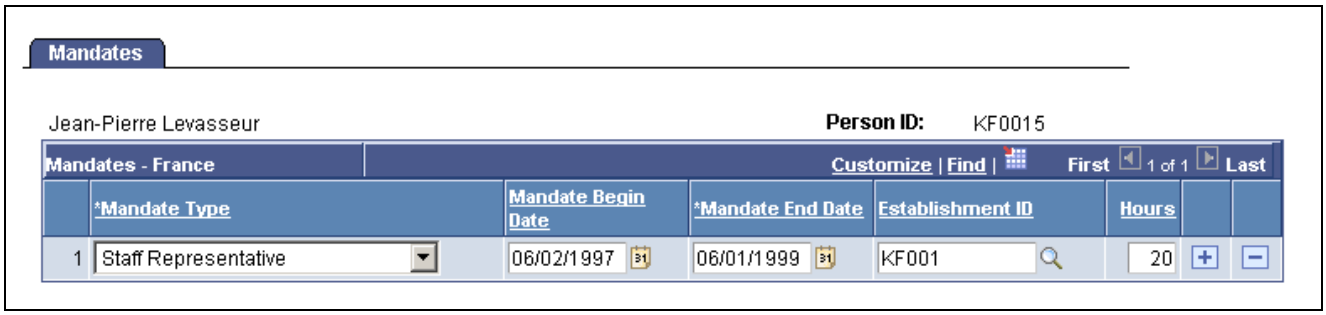
- Track mandate information.
- Enter worker military service information.

Pages Used to Provide Additional Information for French Workers

Page Name	Object Name	Navigation	Usage
Mandates	MANDATES_FRA	Workforce Administration, Job Information, Mandates FRA	Track mandate information for French workers.
Military Situation	MILIT_SITUATN_FRA	Workforce Administration, Personal Information, Biographical, Military Situation FRA	Enter worker military service information, including the branch of the armed forces in which the worker served, and the worker's ID number, grade, and reserve status.

Tracking Mandate Information

Access the Mandates page.



Mandates page

Mandate Type Select a mandate type.

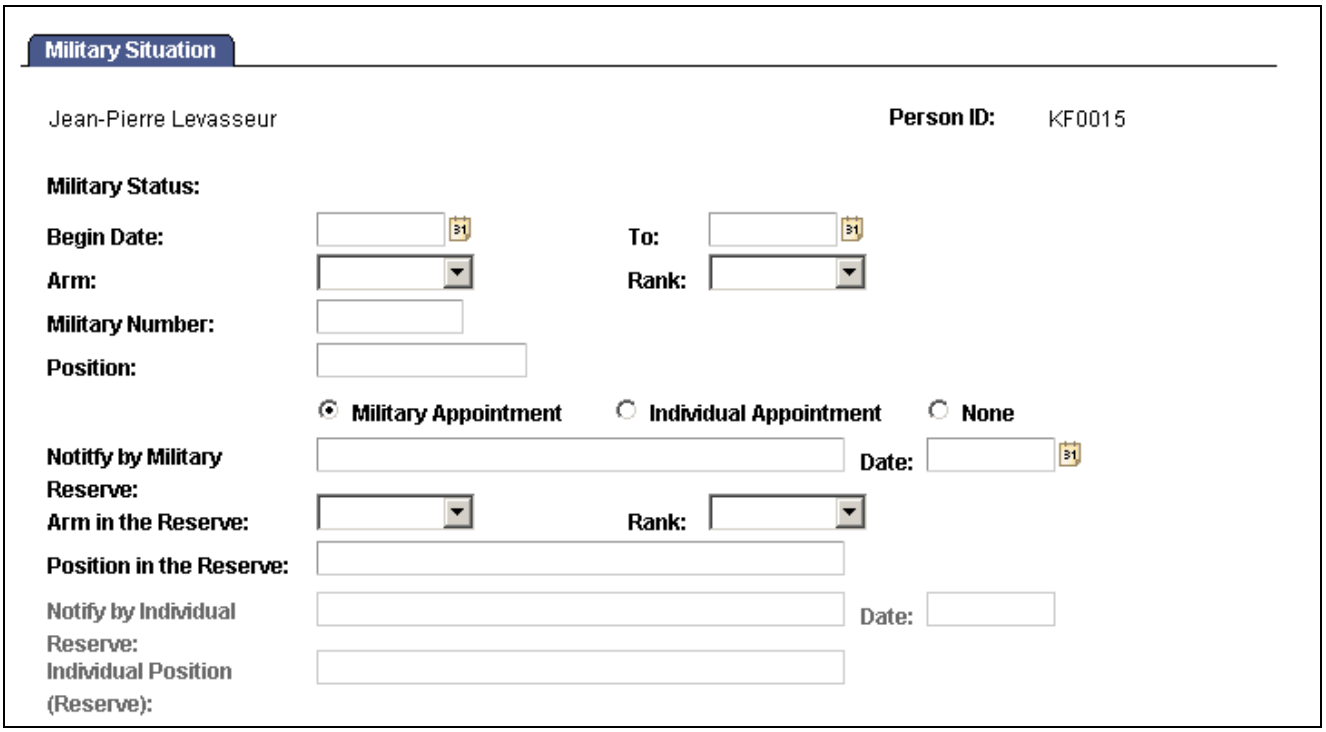
Mandate Begin Date and **Mandate End Date** Enter the mandate begin and end dates during which the worker was associated with the mandate type.

Establishment ID Select an establishment ID.

Hours Indicate the number of hours for the mandate, if appropriate.

Entering Worker Military Service Information

Access the Military Situation page.



Military Situation page

Begin Date and **To** Indicate the begin and end date for the worker's military service.

Arm Enter the arm of the military in which the worker served.

Rank, Military Number, and **Position** Indicate the worker's rank, military number, and position if known.

Military Appointment, Individual Appointment, and **None** Indicate if the service was the result of a military appointment, an individual appointment, or none (to indicate that the worker wasn't appointed to the position).

If the worker had a military appointment, enter additional reserve information.

Notify by Military Reserve Enter the appropriate Notify by Military Reserve information.

Date Enter the date of notification.

Arm in the Reserve Enter the worker's arm in the reserve.

Rank Enter the worker's rank.

If the worker has an individual appointment, enter additional information.

Notify by Individual Reserve Enter the appropriate Notify by Individual Reserve information.

Date Enter the date of notification.

Individual Position (Reserve) Enter the worker's individual position in the reserve.

(NLD) Recording and Reporting SAMEN Diversity Information for Dutch Workers

This section provides an overview of the SAMEN diversity law and SAMEN registration and discusses how to:

- Establish a worker's ethnic status.
- Run the NLD Law SAMEN Statistics report.

Understanding the SAMEN Diversity Law and SAMEN Registration

If you have a Dutch workforce, you need to track information on the national origin of an employee's birth parents. This information establishes the ethnic status of workers, which complies with the SAMEN diversity law, or the "law to promote equal labor participation for persons of a different ethnic origin" in the Netherlands.

The SAMEN law provides for equal employment opportunities for immigrant workers or their children or both. The birth country of either the employee or one of the employee's parents determines whether the employee qualifies as a SAMEN employee and can be recorded as such for reporting to the Dutch government. Children of immigrant workers are subject to this law as well, even if they were born in the Netherlands, and even if the parents have been naturalized in the meantime, as long as one of the parents was born in one of the SAMEN countries. Every two years, the Dutch Ministry Of Social Affairs reviews the list of countries that are designated as SAMEN countries. This decision depends mainly on employment statistics for immigrant workers (and their children) from certain countries .

If the employee qualifies and has no objection to SAMEN registration, record the birth country of the employee's mother and father. When you select a birth country for the employee's parents, you can choose only from among those countries stored in the Country table (COUNTRY_TBL). The system indicates if the birth country is one of the SAMEN countries stored in the NLD SAMEN Country table. When the selected country is *IDN* (Indonesia), an additional category appears, which indicates an additional choice to fulfill SAMEN ID requirements.

Pages Used to Record and Report SAMEN Diversity Information for Dutch Workers

Page Name	Object Name	Navigation	Usage
SAMEN Registration	SAMEN_NLD	Workforce Administration, Personal Information, Diversity Compliance NLD, Law SAMEN Registration	Establish worker ethnic status to comply with the SAMEN diversity law for a qualifying Dutch worker.
WBEAA Data - NLD	RUNCTL_PER038_NL	Workforce Administration, Personal Information, Diversity Compliance NLD, Law SAMEN Report	Run the NLD Law SAMEN Statistics report (PER038NL).

Establishing a Worker's Ethnic Status

Access the SAMEN Registration page.

SAMEN Registration page

Objection Registration Select if the employee objects to being included in the SAMEN reporting to the Dutch government. If selected, the system won't include the employee when you generate the SAMEN report.

Included in Target Group Select to include the employee in the SAMEN reporting to the Dutch government. This field is available for entry only when one parent comes from a target group.

SAMEN Identification

Birth Country Displays the employee's birth country.

Note. The system always displays the employee's birth country and indicates if it is one of the SAMEN countries stored in the NLD SAMEN Country table.

Father's Birth Country and **Mother's Birth Country** Select the birth country of the employee's father and mother.

Category This field appears if a birth country is *IDN* (Indonesia). Select one of these values to fulfill SAMEN ID requirements:

- *Former Netherlands East Indies:* (born in Indonesia before December 27, 1949).
- *Incl. Law Rietkerk-uitkering:* (in Register 1b, *Rietkerk-uitkering* law).
- *Indonesia (after 27-12-1949):* (born in Indonesia after December 27, 1949).

In Target Group The system automatically selects this check box if the birth country for the employee, employee's father, or employee's mother is one of the countries stored in the NLD SAMEN Country table.

Running the NLD Law SAMEN Statistics Report

Access the WBEAA Data - NLD page.

The Law SAMEN Statistics report (PER038NL) produces the required SAMEN statistics information. The reports lists the number of people in the workforce who were born in a SAMEN country, or one of whose parents was born in one.

(ITA) Recording Additional Hiring Data for Italian Workers

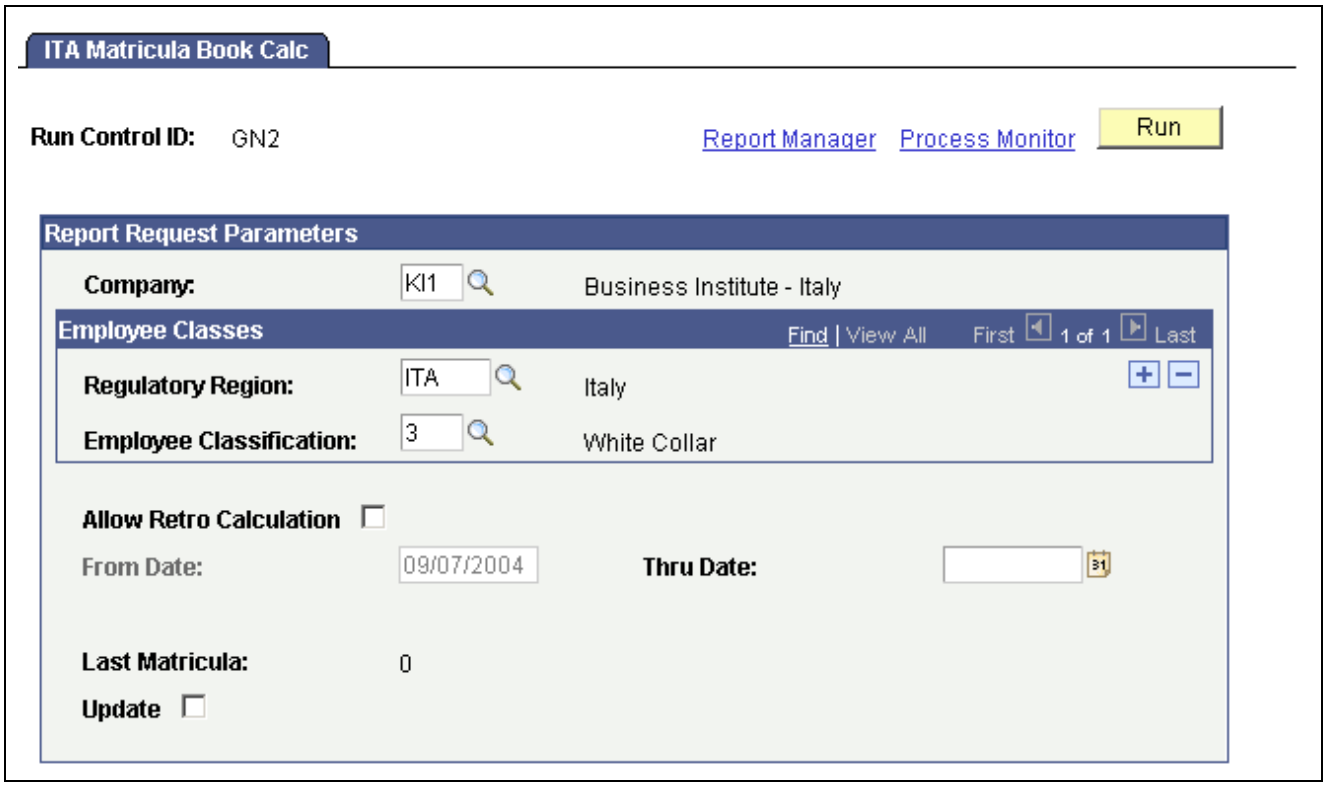
This section discusses how to run the Matricula Book Calculation process.

Pages Used to Record Additional Hiring Data for Italian Workers

Page Name	Object Name	Navigation	Usage
ITA Employee Documentation	EMPL_DOC_ITA	Workforce Administration, Job Information, Employment Categorization ITA, Documents	Record an employee's workbook code and employment eligibility, or C1 declaration code and release date.
ITA Employee Job Letter	EMPL_JOBLTR_ITA	Workforce Administration, Job Information, Employment Categorization ITA, Job Letters	Use the ITA Employee Job Letter page to print the hiring letter to be signed by both employee and employer on or before the first day of employment. The page displays company, labor agreement, and employee category information. Select the Print Letter check box and enter the date. Select Save to print the letter.
Empl Comp Cd Ita (employee company codes, Italy)	EMPL_COMP_CD_ITA	Workforce Administration, Job Information, Employment Categorization ITA, Company Codes	Use the Empl Comp Cd Ita page to link employees with company INAIL, INPS, PREV, INPDAI, and CIA codes.
Personal/Job Data	EMPL_MATR_BOOK_ITA	Workforce Administration, Job Information, Employment Categorization ITA, Matricula Book, Personal/Job Data	View or update data to be included in the Matricula book.
Address Data	EMPL_MTRBKADDR_ITA	Workforce Administration, Job Information, Employment Categorization ITA, Matricula Book	View or update Matricula book address data.
ITA Matricula Book Calc	RUNCTL_MATRBK_ITA	Workforce Administration, Job Information, Employment Categorization ITA, Matricula Calculation	Run the Matricula Book Calc process to update the Matricula table.

Running the Matricula Book Calculation Process

Access the ITA Matricula Book Calc page.



ITA Matricula Book Calc page

Employee Classification Select the employee classification for this book.

Allow Retro Calculation Select to enable retroactive calculations to capture previously lost or missed matricula data.

Last Matricula: Update Select if you want the process to check for new matricula data only.

(ITA) Recording End of Employment Information for Italian Workers

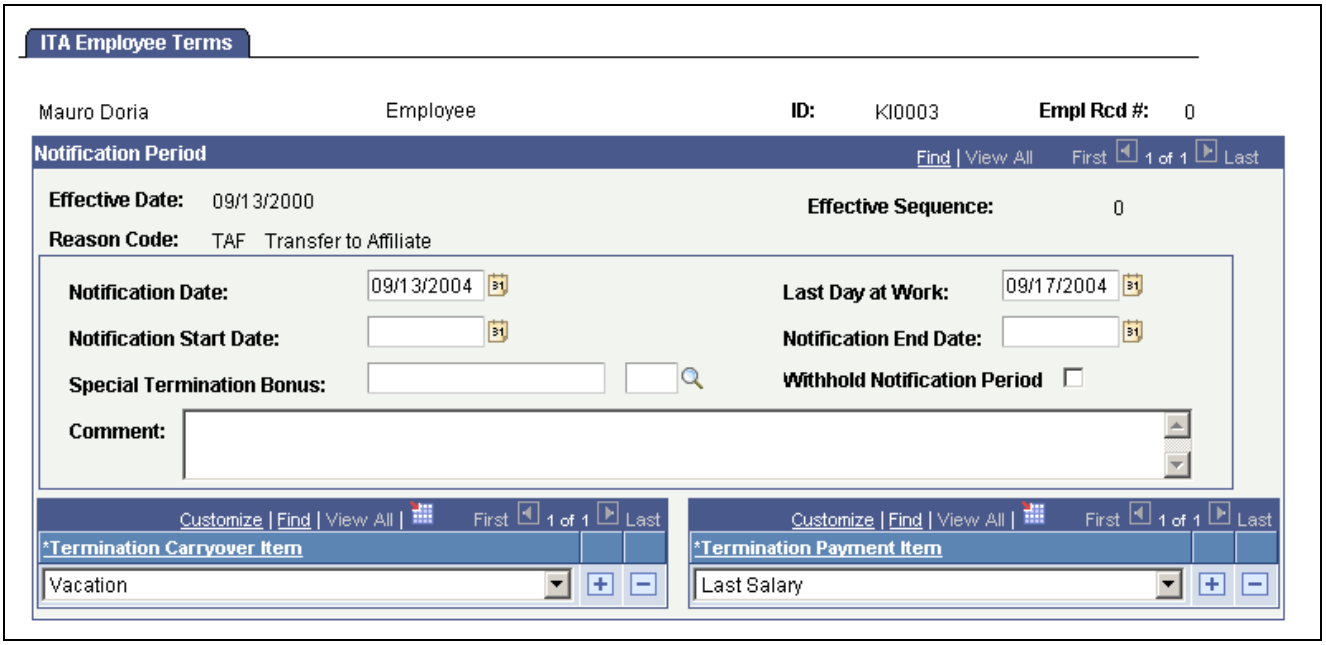
This section discusses how to record employee resignation dates and normal notice periods.

Page Used to Record End of Employment Information for Italian Workers

Page Name	Object Name	Navigation	Usage
ITA Employee Terms	EMPL_TERMS_ITA	Workforce Administration, Job Information, Employee Categorization ITA, Terms	Record the date on which an employee resigns from your company, and the normal notice period as required by the employee's contract.

Recording Employee Resignation Dates and Normal Notice Periods

Access the ITA Employee Terms page.



ITA Employee Terms page

Notification Date Enter the date on which the employee gave notice of intent to end the contract.

Last Day at Work Enter the last day the employee will be at work.

Notification Start Date and **Notification End Date** Enter the start and end dates of the notification *(preavviso)* period, that is, the period for which the employer still pays contributions after termination. If the employment is terminated by the payee and notification is to be withheld, this is the period for which the amount should be withheld.

Special Termination Bonus Enter any bonus incentive owed to the employee.

Withhold Notification Period Indicates whether the employee's salary is to be withheld during the period between the notification start and end dates. This is an information-only field.

Termination Carryover Item Enter items that the employee can carry over for a termination. For example, during terminations such as a term for transfer to an affiliate, the employee and the employer can decide to "freeze" some items that can be transferred to the same employee for the new hiring process in the new affiliate company.

Termination Payment Item Enter items that should be paid after termination.

(ITA) Running the Equal Opportunities Report

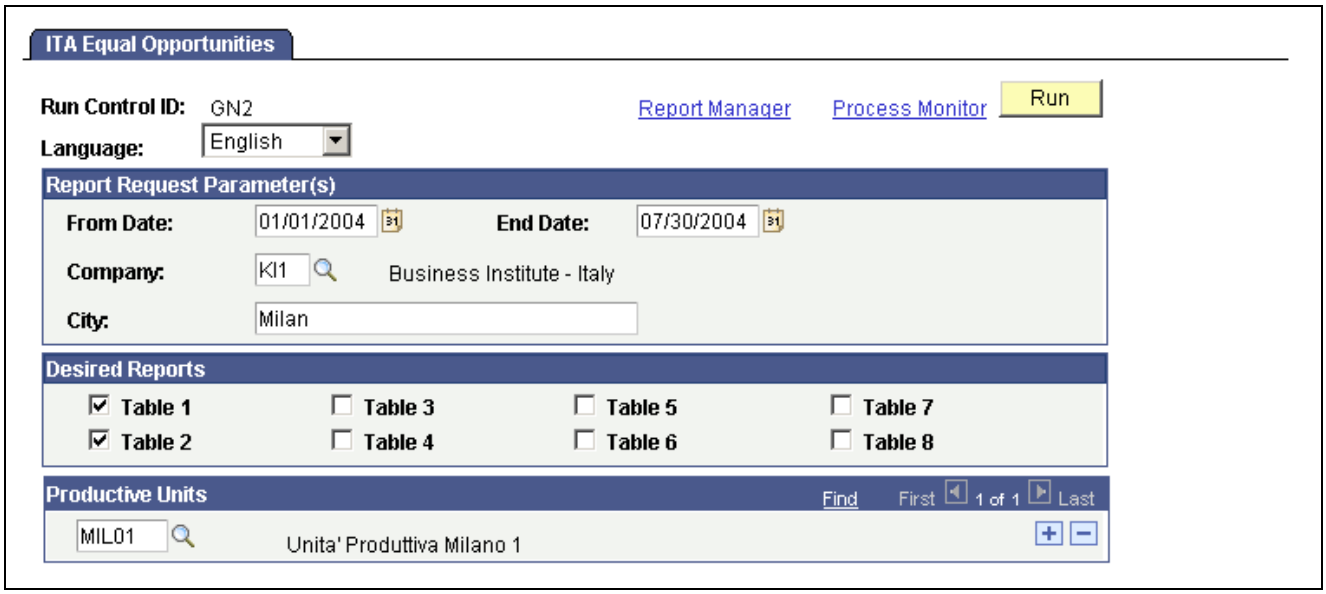
This section discusses how to run the Equal Opportunities report.

Page Used to Run the Equal Opportunities Report

Page Name	Object Name	Navigation	Usage
ITA Equal Opportunities	RUNCTL_PER053	Workforce Administration, Labor Relations, Reports, Equal Opportunities ITA	Run the ITA Equal Opportunities report (PER053). This report is submitted every two years and consists of eight different tables. All companies with 100 or more employees are required to submit this report.

Running the Equal Opportunities Report

Access the ITA Equal Opportunities page.



ITA Equal Opportunities page

Desired Reports

Select the Equal Opportunities report tables that you want to populate.

Table 1 *(Informazioni Generali Sull'azienda)*

This table contains:

- Company and location information.
- Total number of employees as of December 31st of the second year of the reported period.
- Economic activity, including IVA organization codes.
- All CCNL information that applies.

Table 2 *(Informazioni generali sulle unitá nell'ambito comunale)*

This table contains:

- Location address.
- Total number of employees at that location as of the reporting date.

- Number of employees as of December 31st of the second year of the reported period.

Table 3 *(Entrate e uscite nel biennio)*

This table contains:

- Number of employees as of December 31st of the first year of the reported period.
- The number of hires as of December 31st of the first year of the reported period.
- The number of terminations as of December 31st of the first year of the reported period.
- Number of employees as of December 31st of the second year of the reported period.

Table 4 *(Occupati al 31.12 del secondo anno del biennio e promozioni e assunzioni nell'anno)*

Lists the number of employees in each of the following categories: *dirigenti, quadri, impiegati,* and *operai.* Within each category, the report lists the number of employees per category level.

Table 5 *(Occupati al 31.12 del secondo anno del biennio per tipo contratto. CIG e aspettativa)*

Lists, per contract type, the number of employees in each of the following categories: *dirigenti, quadri, impiegati,* and *operai.*

Table 6 *(Elenco delle entrate, uscite e trasformazioni contratto (secondo anno del biennio))*

This table contains the following information listed by category *(dirigenti, quadri, impiegati,* and *operai):*

- Hires, including employees transferred from another location of the company, employees changed from another category, and new hires.
- Terminations, including employees transferred to another location of the company or transferred to another category, and termination of the labor relation (pension, resignation, contract expiration, individual or collective dismissal, death, and disability).
- Contract changes, including from *Determine Period* to *Undetermined,* from part-time to full-time, and vice versa.

Table 7 *(Formazione del personale svolta nel corso del secondo anno del biennio)*

This table contains the following information listed by category *(dirigenti, quadri, impiegati,* and *operai):*

- Number of training participants.
- Total hours of training participation per category.

Table 8 *(Retribuzione annua (secondo anno del biennio) per livello e categoria professionale)*

This table contains the annual gross salary amount subdivided by category *(dirigenti, quadri, impiegati,* and *operai)* and contractual level.

Productive Units

Select the productive units of the employees on whom you're reporting.

(USA) Determining U.S. Residency Status for Foreign Nationals

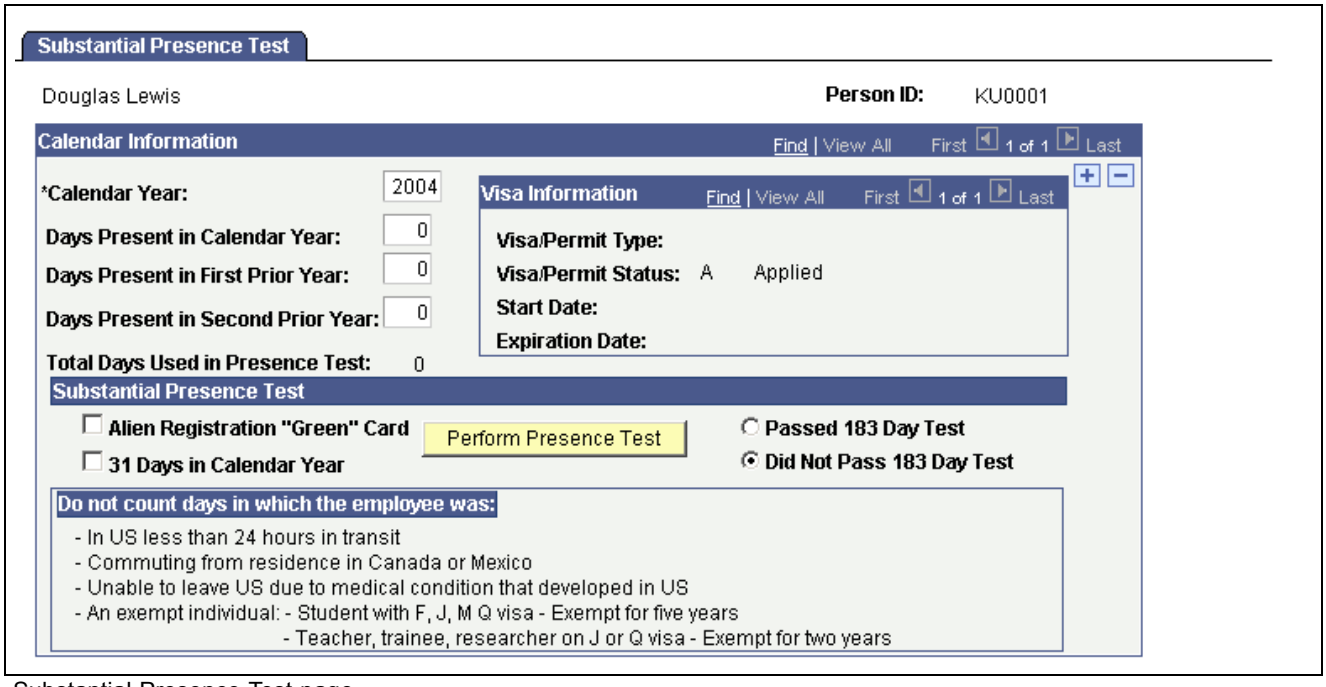
This section discusses how to run the Substantial Presence test.

Page Used to Determine U.S. Residency Status for Foreign Nationals

Page Name	Object Name	Navigation	Usage
Substantial Presence Test	PRESENCE_TEST	Workforce Administration, Personal Information, Citizenship, Employee Presence Test USA	Run the Substantial Presence test to determine if alien employees are considered U.S. residents for tax purposes for a particular calendar year.

Running the Substantial Presence Test

Access the Substantial Presence Test page.



Substantial Presence Test page

Under this test, a foreign national is considered a resident for tax purposes if the person is present in the U.S. at least 31 days in the current year and 183 days during the current year and the two preceding years, as determined under a weighted formula.

Nonresident aliens may make a special election to be treated as residents for the first year in which they are present in the U.S. This election is subject to several restrictions, one of which is that the nonresident alien must satisfy the Substantial Presence test in the year following the election.

Rules that govern which days don't count towards an employee's Substantial Presence test appear in the Do not count days in which the employee was group box. This test is only valid for current or previous years.

Visa Information

If the employee has a visa or permit, this group box provides information about the visa or permit.

Calendar Information

Calendar Year Enter the appropriate calendar year.

Days Present in Calendar Year, Days Present in First Prior Year, and **Days Present in Second Prior Year** Enter the number of days present in the current year, the previous year, and the year previous to that.

The actual days present in the first prior year equal 1/3 of 365 minus the value in the Days Present in First Prior Year field. The actual days present in the second prior year equal 1/6 of 365 minus the value in the Days Present in Second Prior Year field.

For example, enter the number of days present in 1998, followed by the number of days present in 1997, followed by the number of days present in 1996.

The Total Days Used in Presence Test field automatically displays the total number of days after all of the previous fields are completed.

Note. If you are entering Substantial Presence test information for multiple years, the First Prior Year and Second Prior Year fields are based on the prior year information.

Substantial Presence Test

Alien Registration "Green" Card Select if the employee has been issued an alien registration card, or green card. If you select this check box, the Substantial Presence test isn't necessary; the employee is considered a U.S. resident for tax purposes.

31 Days in Calendar Year This check box is automatically selected if the employee has been present 31 days in a calendar year.

Perform Presence Test Click to see if the employee passed the Substantial Presence test. The system calculates the total number of days present and selects either the Passed 183 Day Test or Did Not Pass 183 Day Test option.

In the 183 Day Test calculation, the system uses 100 percent of the days present in the calendar year.

CHAPTER 10

(JPN) Tracking Additional Appointments (Kenmu)

This chapter provides an overview of additional appointments (*kenmu*) and discusses how to:

- Set up codes for tracking additional appointments.
- Set up security for tracking additional appointments.
- Set up to handle additional appointment terminations.
- Record and view employee additional appointments data.

Understanding Additional Appointments

Additional appointments are tracked as additional jobs (employment record numbers) in the Job record. The Additional Appointment Information page enables tracking of multiple additional appointment rows for each main appointment row of the Job record. A separate Enter Cost Rate Information page enables the tracking of cost rate distribution among a main appointment and its additional appointments.

The system automatically increments employment record numbers, including additional appointments. The total number of additional appointments appears with main appointment data on the employee's Job Summary JPN page.

When additional appointments exist in conjunction with intercompany transfers, for example when you serve as a hosting company, you can store information about additional appointments that your transferee may have in the home company, as well as any additional appointment information within your company as host.

On the Employee Assignment List report, you can view employees by department, including an employee's additional appointments.

When you terminate a main appointment, the system automatically terminates all additional appointments associated with it.

See Also

Chapter 13, "Updating Person and Job Information," (JPN) Understanding Reporting Appointments for Job Data Changes, page 368

Internal and External Companies

Some of the pages used for tracking additional appointments distinguish between internal and external company appointments. Here are the definitions of internal and external companies:

Internal Companies — Companies that are internal to your organization's database. Data for these companies is already set up on the Company table and Department table.

External Companies Companies that are external to your organization's database. You must set up data for these companies on the Intercompany Transfer Company/Department table.

Setting Up Codes for Tracking Additional Appointments

To set up the codes for tracking additional appointments, use the IC Trans External Company/Dept (INTCPX_CPY_JPN), IC Trans External Superv Lvl (INTCPX_SPV_JPN), Additional Appointment Setup for Existing Business Units (RC_AA_JOBCODE_JPN), and Additional Appointment Setup (AA_SETUP_JPN) components.

This section provides overviews of dummy codes and setup steps for additional appointments, lists prerequisites, and discusses how to:

- Set up a dummy business unit, company, department, and location.
- Designate Job record codes for additional appointments.

Understanding Dummy Codes

Setup for additional appointment tracking requires the use of dummy codes.

Dummy Job Code

The PeopleSoft system provides a dummy job code for use with all additional appointments. The dummy job code is needed because additional appointment data is held on the Job record, which requires a job code. Because job codes are not tracked as part of additional appointment data, the dummy code is required to be able to save the Job record with additional appointment information. The dummy job code is only used in background processing for saving, and is never visible on any page except the Additional Appointment Setup and Job Code Table pages.

The delivered dummy job code is *AADUMY.* The system automatically creates this job code for each new business unit that you define. If you have already created business units, the system provides an application engine process that creates the dummy job code for each existing business unit. You only have to run the application engine one time. Subsequently, the system automatically creates the dummy job code when you define a new business unit.

See Chapter 10, "(JPN) Tracking Additional Appointments (Kenmu)," Pages Used to Set Up Codes for Managing Additional Appointments, page 289.

Dummy Business Unit, Company, Department, and Location Codes

When the additional appointment is in an external company, the business unit, company, department, and location codes setup for the external company are on the IC Transfer setup tables only, which are not values used in the Job record. Therefore, you must define one dummy code for each of these required fields so that you can save Job record information for additional appointments to external companies. Set up and use the same codes for all additional appointments to external companies. The PeopleSoft system does not deliver these dummy codes.

The dummy codes are only used in background processing for saving and are never visible on any page except the Additional Appointment Setup page.

Warning! The department code can impact security, so it is important to create a new department code for which no one has security access. Anyone who can access the dummy department through security will be granted access to all main appointments that have an external assignment.

See Also

Chapter 10, "(JPN) Tracking Additional Appointments (Kenmu)," Setting Up a Dummy Business Unit, Company, Department, and Location, page 289

Chapter 10, "(JPN) Tracking Additional Appointments (Kenmu)," Designating Job Record Codes for Additional Appointments, page 290

Understanding Setup Steps for Additional Appointments

The setup steps for additional appointment tracking vary slightly depending upon whether you:

- Initially implement PeopleSoft Enterprise Human Resources with additional appointment tracking before you set up business units.
- Add additional appointment tracking after you have already set up business units, such as during upgrade.

Both situations require that you create dummy codes and assign them on the Additional Appointment Setup page. The details of how to do this are presented in later sections.

When Business Units Have Not Been Defined

Here are the steps for setting up additional appointment tracking when you have not yet defined business units:

1. Select Additional Appointment Enabled in the Japanese Parameters section of the Installation Table − Country Specific page.
2. Set up your organization's business units on the Business Unit page.

   The system automatically creates the dummy job code *AADUMY* for each business unit that you define.
3. Create a dummy business unit, company, department, and location for use with additional appointments to external companies.
4. Assign the dummy codes on the Additional Appointment Setup page.
5. (Optional) Set up additional appointment security.

When Business Units Have Already Been Defined

If you are setting up additional appointment tracking when you have already defined business units, such as when upgrading, the steps are the same as listed in the previous section with the exception of step 2:

1. Select Additional Appointment Enabled in the Japanese Parameters section of the Installation Table − Country Specific page.
2. Run the AA_JOBCODE_JPN Application Engine process to create the dummy job code *AADUMY* for each business unit in your system.

   You only have to run the application engine process one time. Subsequently, the system automatically creates the dummy job code for each business unit that you define.
3. Create a dummy business unit, company, department, and location for use with additional appointments in external companies.
4. Enter the dummy codes on the Additional Appointment Setup page.

5. (Optional) Set up additional appointment security.

See Also

Chapter 10, "(JPN) Tracking Additional Appointments (Kenmu)," Setting Up Security for Tracking Additional Appointments, page 290

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Installing PeopleSoft HRMS"

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," Defining Business Units

Prerequisites

If you plan to track additional appointments in external companies, you must set up the following for the external companies:

- Company and department IDs for external company appointments on the IC Trans External Company/Dept page.

  See Chapter 3, "Setting Up Country-Specific Tables," (JPN) Setting Up Intercompany Transfer Company Data, page 34.

- Supervisor levels for external company appointments on the IC Trans External Superv Lvl page.

  See Chapter 3, "Setting Up Country-Specific Tables," (JPN) Setting Up Japanese Supervisor Levels, page 35.

These codes provide the prompt values on the Edit Additional Appointment Information page and are visible on pages that display employee additional appointment data.

Pages Used to Set Up Codes for Managing Additional Appointments

Page Name	Object Name	Navigation	Usage
IC Trans External Company/Dept	INTCPX_CPY_JPN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, IC Trans External Company/Dept	Set up company and department codes for intercompany transfers to and additional appointments in external companies.
IC Trans External Superv Lvl	INTCPX_SPV_JPN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, IC Trans External Superv Lvl	Set up supervisor level codes for intercompany transfers to and additional appointments in external companies.
Additional Appointment Setup for Existing Business Units	RC_AA_JOBCODE_JPN	Set Up HRMS, Install, Product and Country Specific, AA Setup for Existing BUs JPN	Run the AA_JOBCODE_JPN Application Engine process to create the dummy *AADUMY* job code for each existing business unit. Run this process only if business units already exist at the time of implementing additional appointment tracking. You only run this process one time.
Additional Appointment Setup	AA_SETUP_JPN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, Additional Appointment Setup	Enter the dummy business unit, company, department, location, and job codes to populate required entry fields on the Job record for additional appointments.

Setting Up a Dummy Business Unit, Company, Department, and Location

Set up one dummy code to be used with all additional appointments for each of the following:

- Business unit

  See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, “Setting Up Organization Foundation Tables,” Defining Business Units.

- Company

  See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, “Setting Up Organization Foundation Tables,” Entering Company Information.

- Department

  See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, “Setting Up Organization Foundation Tables,” Maintaining Departments.

- Location

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up Organization Foundation Tables," Establishing Locations.

Additional Setup Instructions

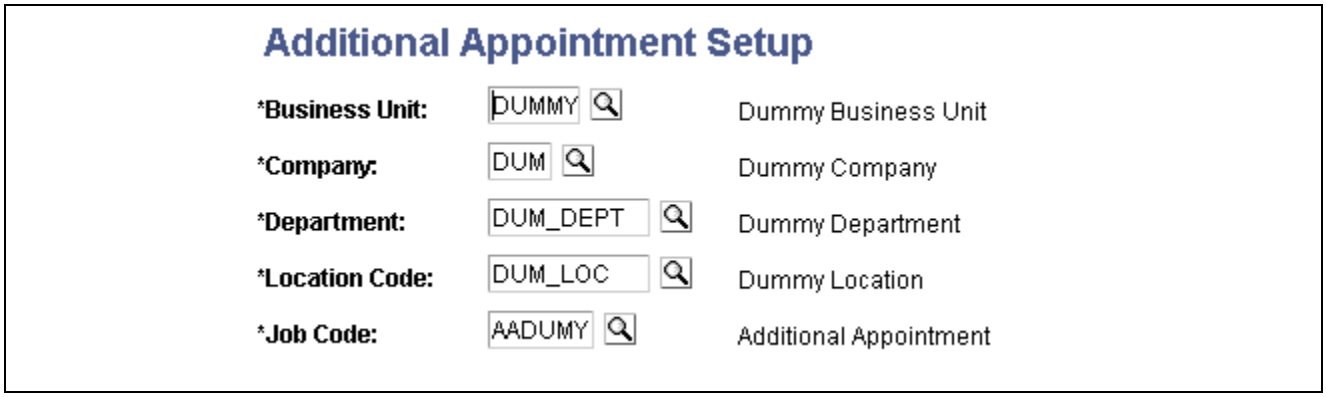
The following are important points to keep in mind when setting up these dummy codes for use with additional appointments to external companies:

- We recommend that they not be real business unit, company, department, and location codes, because of the possible effect on security and reporting.
- You may use a real, existing setID to define the dummy codes.
- The dummy department must be excluded from the department tree.

  Otherwise, anyone who has access to the dummy department has access to *all* main appointments of employees who have an additional appointment in an external company.

Designating Job Record Codes for Additional Appointments

Access the Additional Appointment Setup page.



Additional Appointment Setup page

The prompt values for the Business Unit, Company, Department, and Location Code fields are the valid codes set up in the respective setup tables for your PeopleSoft database. In each field, select the single dummy code that you defined for use with additional appointments.

Job Code *AADUMY* is the default value.

The system uses the values on this page to populate the Job record so that it can be saved.

Setting Up Security for Tracking Additional Appointments

To set up the security for tracking additional appointments, use the Security Install Settings (SCRTY_INSTALL), Security Type Table (SCRTY_TYPE2_TBL), and AA Security JPN (AA_SECURITY_JPN) components.

This section provides an overview of security for additional appointments and discusses how to:

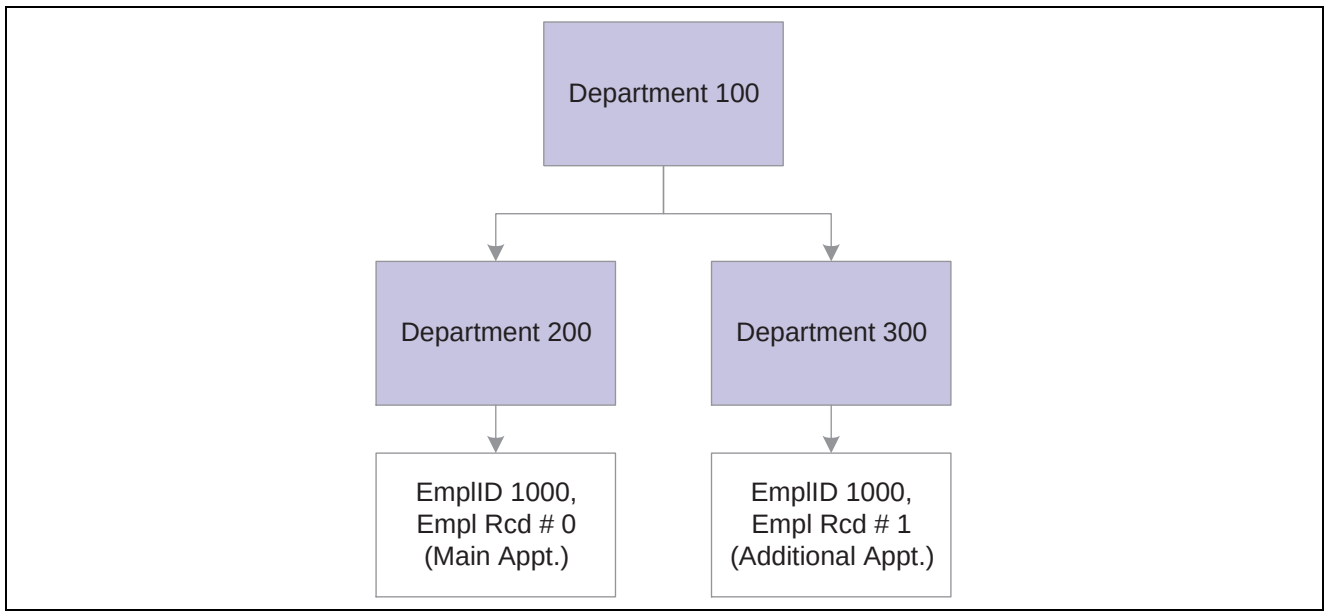
- Set up the security basis for additional appointments.
- Select reports that use additional appointment security.

Understanding Security for Additional Appointments

The PeopleSoft system provides two security options for accessing additional appointment data, departmental security and security for additional appointments. If you choose to use the default option, departmental security, additional appointments do not provide any additional security access. The user must have access to the department in which the main appointment resides to access an employee's data. If you set up security for additional appointments, then additional appointments do provide additional security access. A user can view the main appointment if the main appointment or any of its additional appointments resides in a department to which the user has access.

Example of Security Access

This illustration of security access is based on the following department security tree:



Sample department security tree

Here is how security works for the two security options:

- If you choose to use the default, departmental security:
  - If the user has access to department 200, then the user has access to the data for employee ID 1000.
  - Even if the user has access to department 300, the user does not have any access to the data for employee ID 1000.
- If you choose to set up security for additional appointments:
  - If the user has access to department 200, then the user has access to the data for employee ID 1000.
  - If the user has access to department 300 only, then the user can access the data for employee ID 1000 because the employee has an additional appointment in department 300.

Note. Security access is dependent on the system date being earlier than the effective date of the release of the additional appointment. Security access to the data row ceases with the effective date of the additional appointment release.

Pages Used to Set Up Security for Additional Appointments

Page Name	Object Name	Navigation	Usage
Security Install Settings	SCRTY_INSTALL	Set Up HRMS, Security, Core Row Level Security, Security Installation Settings, Security Install Settings	Choose the HRMS security settings for your installation.
Security Type Table	SCRTY_TYPE2_TBL	Set Up HRMS, Security, Core Row Level Security, Security Access Type, Security Type Table	Use to enable existing security access types or create new ones.
AA Security JPN	AA_SECURITY_JPN	Set Up HRMS, Security, Addl Appt Rport Security JPN	Select the reports that use additional appointment security.

Setting Up Additional Appointment Security

To set up security for additional appointments:

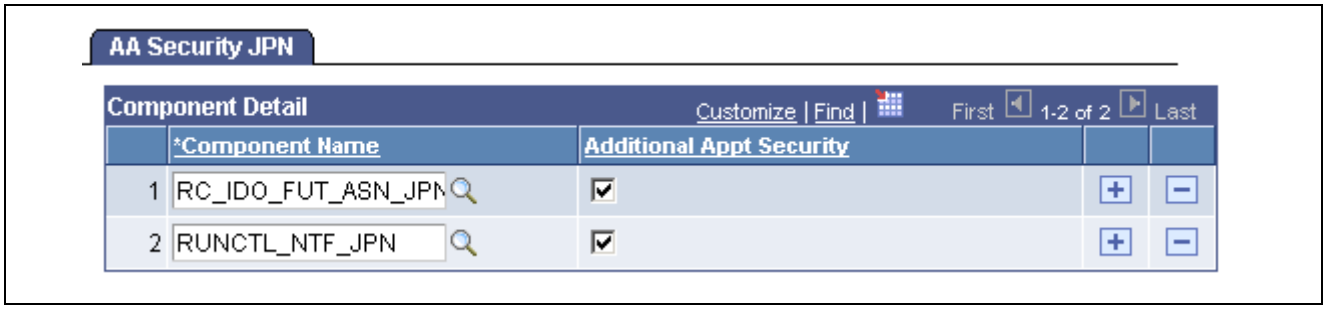
1. Select *JPN Appointment* on the Security Install Settings page.
2. Select *JPN Additional Appointment* on the Security Type Table page for the PPLJOB security set.
3. Refresh the security join tables using the Refresh SJT_CLASS_ALL component (SCRTY_OPR_RC).

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Selecting Reports that Use Additional Appointment Security

Access the AA Security JPN page.



AA Security JPN page

The following table lists the only reports that can be enabled for additional appointment security and the component name to select on this page:

Report ID	Report Name	Component Name
PER062JP	Grade Advance Candidate List	RUNCTL_PER062_JPN
PER063JP	Appointment Notification JPN	RUNCTL_NTF_JPN
PER064JP	Appointment List JPN	RUNCTL_NTF2_JPN
PER065JP	Completion of IC Transfer JPN	RUNCTL_PER065_JPN
PER066JP	Employee Assignment List JPN	EMP_ASN_LST_JPN
PER072JP	Future Employee Assignment List	RC_IDO_FUT_ASN_JPN
PER074JP	Ido Candidate Listing	RC_IDO_EE_LIST_JPN

For other reports, the only way to access information on the main appointment is to have access to the department on which the main appointment resides. The department of the additional appointment does not provide any additional access for any reports other than the five reports listed here, even when additional appointment security is activated.

The purpose of activating additional appointment security for these reports is to display the main appointments when there is security access to the additional appointment. Activating additional appointment security does not display additional appointments on PER062JP, PER063JP, PER064JP, and PER065JP. PER066JP, PER072JP, and PER074JP display additional appointments.

When additional appointment security is activated for these five reports, the system evaluates only current job information. The system ignores future-dated job rows, such as future-dated hires or terminations. Regardless of the security option selected, the system uses only the current row to determine security access.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Setting Up to Handle Additional Appointment Terminations

When you terminate a main appointment, the system employs a message subscription that uses a component interface to automatically terminate all additional appointments that are associated with the main appointment.

The message subscription is delivered inactive; you must activate it if you use additional appointment functionality. Following are the details you need to activate the subscription:

Message subscription Termination_Add_Appt

Message name WORKFORCE_SYNC

Channel	PERSON_DATA
Tables written to	JOB Termination rows are inserted for all active additional appointments associated with the terminated main appointment.

See Also

PeopleTools 8.45 PeopleBook: PeopleSoft Enterprise Integration

Recording and Viewing Employee Additional Appointments Data

This section discusses how to:

- Add, change, or release additional appointments.
- Record additional appointment details.
- Distribute cost.

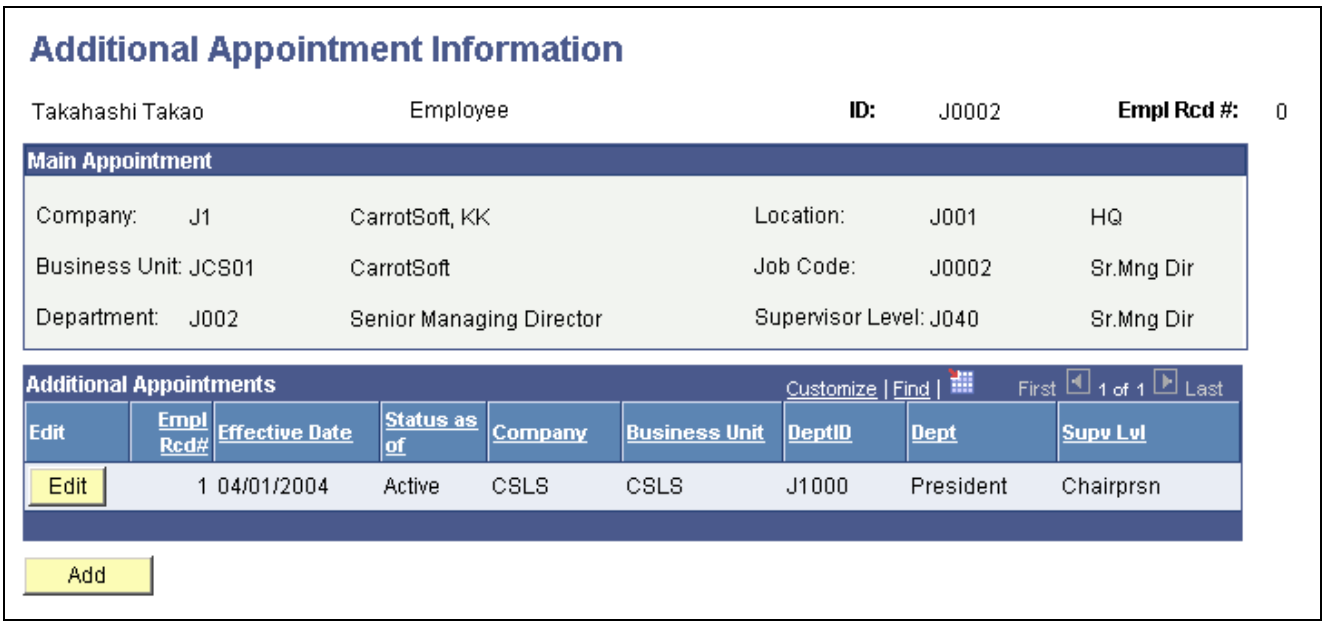
Note. To access additional appointment data, you must first access the associated main appointment in the search page.

Pages Used to Record and View Employee Additional Appointments Data

Page Name	Object Name	Navigation	Usage
Additional Appointment Information	AA_MGMT_JPN	Workforce Administration, Job Information, Additional Appointment JPN	Add, change, or release additional appointments.
Edit Additional Appointment Information	AA_MGMT_JPN_SEC	Click the Add or Edit button on the Additional Appointment Information page.	Record details of additional appointments.
Enter Cost Rate Information	AA_MGMT_JPN	Workforce Administration, Job Information, Cost Rate JPN	Distribute the cost of a main appointment among its additional appointments.
Job Summary JPN	JOB_SUMMARY_JPN	Workforce Administration, Job Information, Review Job Information, Job Summary JPN	View an employee's job history, including additional appointment total. Access details of additional appointments.
Additional Appointment Data	ADD_APPT_SUMM_SEC	Click the View link for an additional appointment on the Job Summary JPN, Work Location page.	View details of additional appointments.

Adding, Changing, or Releasing Additional Appointments

Access the Additional Appointment Information page.



Additional Appointment Information page

Additional Appointments

This section of the page displays information about existing additional appointments.

Empl Rcd # (employment record number) The system assigns this number when you add an additional appointment. The system increments the employment record numbers whether an additional appointment or a concurrent job is added. (Concurrent jobs may be added to the system for the purpose of tracking intercompany transfers in a multicompany implementation or for adding a global assignment record.)

Effective Date The effective date of the latest data row for the employment record number. This date might be later than the system date if additional appointment information was entered with an effective date in the future.

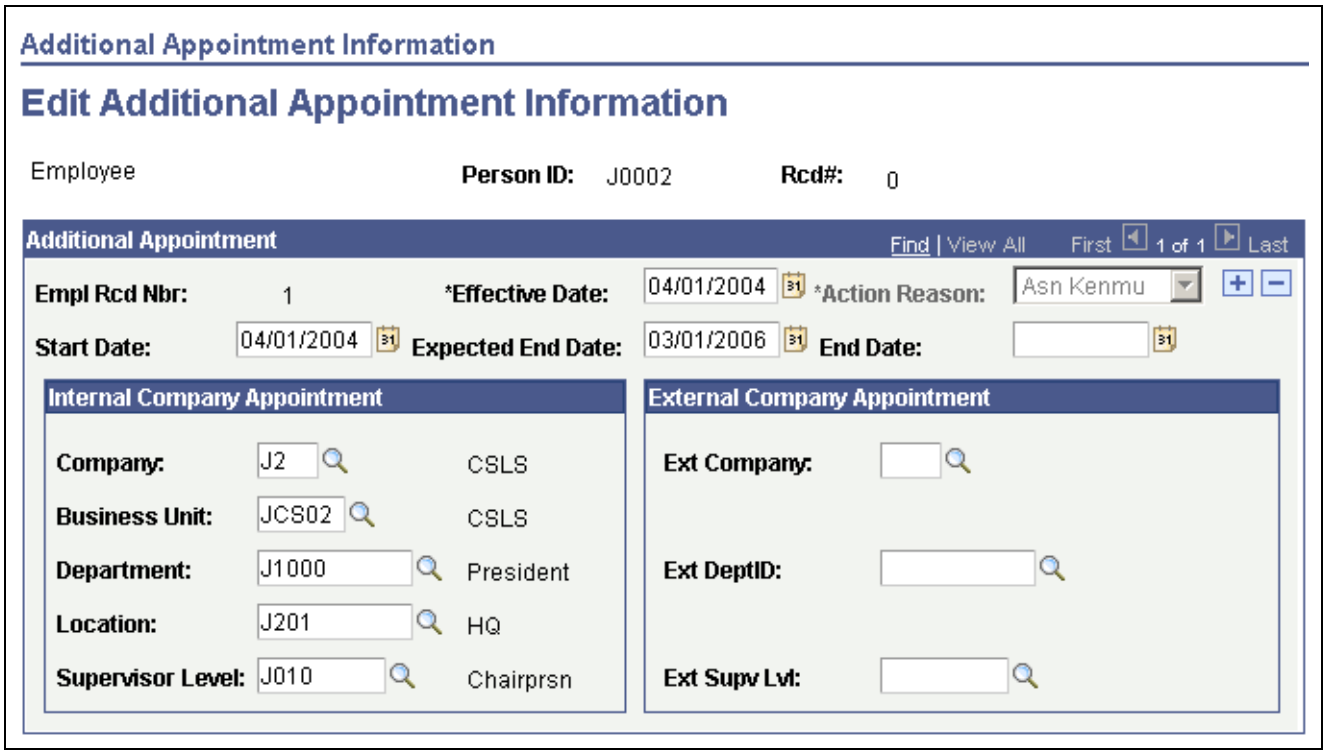
Status as of The status of the appointment as of the date in the Effective Date field for this employment record number. Values are *Active* and *Inactive.*

Edit Click to access the Edit Additional Appointment Information page, where you can change or release the selected additional appointment.

Add Click this button to add an additional appointment. The system displays the Edit Additional Appointment Information page, where you record the details of the new appointment.

Recording Additional Appointment Details

Access the Edit Additional Appointment Information page.



Edit Additional Appointment Information page

Additional Appointment

Empl Rcd Nbr (employment record number)

The system assigns this number when you add an additional appointment. The system increments the employment record numbers whether an additional appointment or a concurrent job is added. (Concurrent jobs may be added to the system for the purpose of tracking intercompany transfers in a multicompany implementation or for adding a global assignment record.)

Action Reason

Three action reason codes are valid for additional appointments:

Asn Kenmu (assign *kenmu*): If click the Add button on the Additional Appointment Information page to access this page, the system enters *Asn Kenmu* and you cannot change it. If you click the Edit button to access the page, you cannot save the page if you select *Asn Kenmu.*

Data Chg (data change): Select this value if you are changing (but not releasing) an additional appointment.

Rel Kenmu (release *kenmu*): Select this value if you are releasing the *kenmu* assignment.

Note. The codes that you enter on this page are translated into action and reason codes on the Job record as follows:

Asn Kenmu: The Job record action is *ADL* (additional job) and the reason is *AKM* (assign *kenmu*).

Data Chg: The Job record action is *DTA* (data change) and there is no action reason associated with it.

Rel Kenmu: The Job record action is *TER* (termination) and the reason is *RKM* (release *kenmu*).

These Job record rows are not visible to users.

Start Date Enter the date on which this additional appointment starts.

Expected End Date Enter the date on which the additional appointment is expected to end.

End Date Enter the date on which the additional appointment actually ends.

Note. The system displays a warning if the End Date value is later than the Effective Date value of the additional appointment release. Security access to the data row ceases with the effective date of the additional appointment release.

Note. You can enter information in either the Internal Company Appointment group box or the External Company Appointment group box. You cannot use both group boxes at the same time.

Internal Company Appointment

Use this group box if the additional appointment is with a company that is included in your organization's database (internal company).

See Chapter 10, "(JPN) Tracking Additional Appointments (Kenmu)," Internal and External Companies, page 285.

External Company Appointment

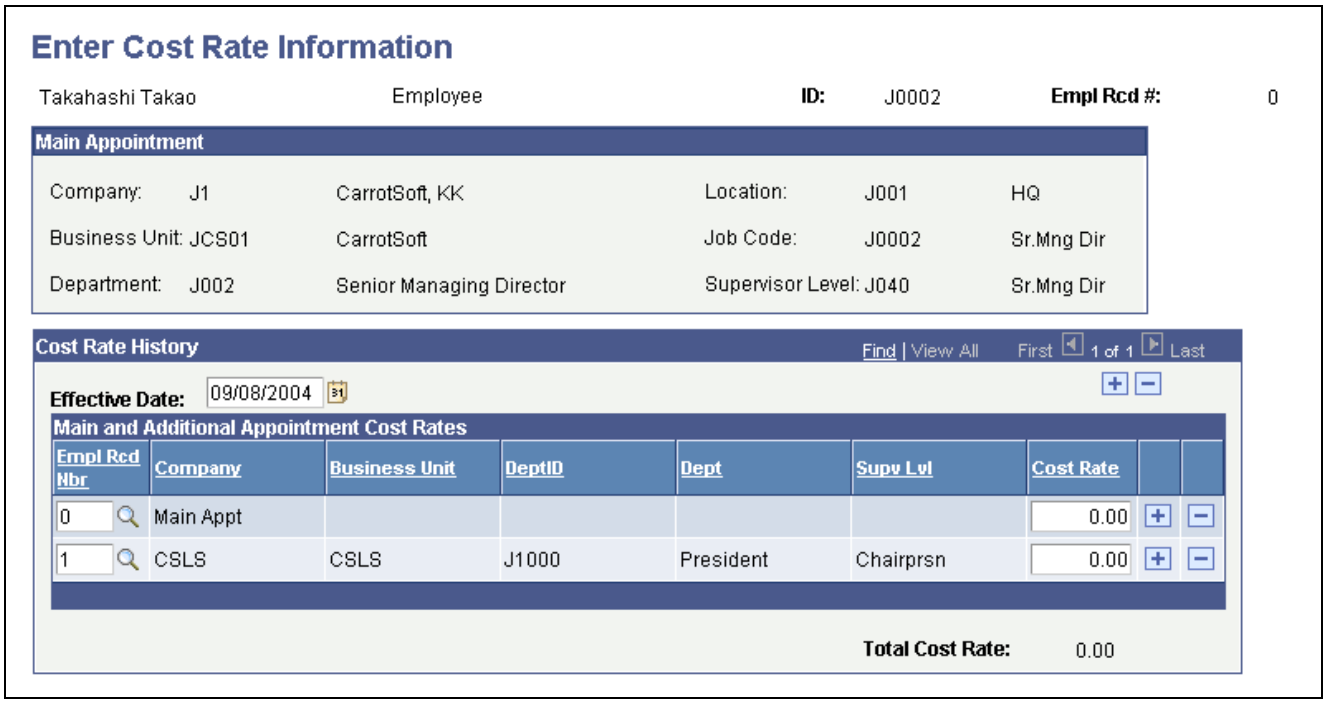
Use this group box if the additional appointment is with a company that is outside of your organization's database (external company). Prompt values come from the data that you set up on the IC Trans External Company/Dept page and the IC Trans External Superv Lvl page.

See Also

Chapter 10, "(JPN) Tracking Additional Appointments (Kenmu)," Prerequisites, page 288

Distributing Cost

Access the Enter Cost Rate Information page.



Enter Cost Rate Information page

Effective Date Enter an effective date for when the additional appointment cost rates are being distributed or redistributed.

Main and Additional Appointment Cost Rates

Empl Rcd Nbr (employment record number) Choose the employment record number for each main or additional appointment that has an associated cost. The only values available in the list are the record numbers of additional appointments associated with the main appointment that you entered to access the page.

When you save the page, the system validates that the employment record is active as of the selected effective date.

Cost Rate Enter the percentage cost associated with the main appointment and each additional appointment.

Total Cost Rate When you save the page, the system validates that the total cost rate for the main appointment and all of its additional appointments equals 100 percent.

CHAPTER 11

(JPN) Tracking Intercompany Transfers (Shukkou)

This chapter provides an overview of the tracking of intercompany transfers and discusses how to:

- Set up employee data for intercompany transfers.
- Enter and maintain home and host data for intercompany transfers.
- Work with search page security.
- Run the Intercompany Transfer report.

Understanding the Tracking of Intercompany Transfers

Whenever you need to track intercompany transfers (*shukkou*), whether as a home company or a host company, you enter a new job record with standard actions such as transfer, termination, and hire, but with specific action reasons that are related to intercompany transfers. You can use the Pay Group field on Job Data - Payroll page to indicate which company is the compensation owner.

Summary of Home and Host Data for Intercompany Transfers

The tables in the two sections that follow provide summarized data entry obligations and requirements for different intercompany transfer scenarios. The first table addresses only the hosting of intercompany transfers; the second table addresses both temporary and permanent intercompany transfers.

A later section provides details of data entry for a series of scenarios.

See Chapter 11, "(JPN) Tracking Intercompany Transfers (Shukkou)," Entering and Maintaining Home and Host Data for Intercompany Transfers, page 304.

This table explains the abbreviations that are used in the two subsequent tables:

Code	Description	Action
TICT	Temporary Intercompany Transfer	*Zaiseki-Shukkou*
PICT	Permanent Intercompany Transfer	*Tenseki-Shukkou*
HICT	Hosting Intercompany Transfer	*Shukkou-Ukeire*
HTICT	Hosting Temporary Intercompany Transfer	*Zaisekki-Shukkou no Ukeire*

Code	Description	Action
HPICT	Hosting Permanent Intercompany Transfer	*Tenseki-Shukkou no Ukeire*
SL	Supervisor Level	*Yakushoku*

Hosting Temporary and Permanent Intercompany Transfers

The following table summarizes the information and security requirements for hosting temporary intercompany transfers from companies within a group that uses PeopleSoft Enterprise HRMS and from other companies that don’t use PeopleSoft Enterprise HRMS:

ICT Type	PA Location	Information and Security Required Within Affiliated Companies that Use PeopleSoft Enterprise HRMS	Information and Security Required for Affiliated Companies that Do Not Use PeopleSoft Enterprise HRMS
1 HTICT	Host (Own Company)	• Host company information, using shared codes (in case of PS group-Company). • The owner of payroll. • ICT period, department, SL, and so on. • In general, employee information is maintained at host (own) company when PA is moved from PA's own company.	• Host company information, using Intercompany Transfer Company /Department and IC Transfer Supervisor Level codes. • The owner of payroll. • ICT period.
2 HPICT	Host (Own Company)	Employee information is maintained at host (own) company only.	Host company information, using Intercompany Transfer Company /Department and IC Transfer Supervisor Level codes.

Temporary and Permanent Intercompany Transfers

This table summarizes the information and security requirements for temporary intercompany transfers to companies within a group that uses PeopleSoft Enterprise HRMS and to other companies that don't use PeopleSoft Enterprise HRMS:

ICT Type	PA Location	AA at Home Company?	Information and Security Required Within Affiliated Companies that Use PeopleSoft Enterprise HRMS	Information and Security Required for Affiliated Companies that Do Not Use PeopleSoft Enterprise HRMS
TICT	Host	No	• Host company information, using shared codes (in case of PS – using group–company). • The owner of payroll. • TICT period, department, SL, and so on. • In general, employee information is maintained at host (own) company when PA is moved from PA's own company.	• Host company information, using Intercompany Transfer Company /Department and IC Transfer Supervisor Level codes. • The owner of payroll. • TICT period.
PICT	N/A Retire	N/A	Employee information will be maintained at host company only.	N/A

Prerequisites

Before you enter intercompany transfers for an employee, you must set up the following intercompany transfer company data:

- Set up a dummy paygroup to use as the compensation indicator if you track intercompany transfers in which the host company (that is, not your company) is responsible for paying the employee.

  Note. This setup is reversed if your company is the hosting company, that is, you set up a dummy paygroup to track hosted intercompany transfers where the home company pays the employee.

- Set up company and department codes to use for tracking intercompany transfers to and from companies that are not registered in the Company table.
- Set up supervisor level and IC Trans External supervisor level codes to use for tracking intercompany transfers to and from companies that are not registered in the Company table.

Note. You can track intercompany transfers (*shukkou*) as additional appointments (*kenmu*) if you set up and use the additional appointment functionality.

See Also

Chapter 3, "Setting Up Country-Specific Tables," (JPN) Setting Up Intercompany Transfer Company Data, page 34

Chapter 3, "Setting Up Country-Specific Tables," (JPN) Setting Up Japanese Supervisor Levels, page 35

Chapter 10, "(JPN) Tracking Additional Appointments (Kenmu)," page 285

Chapter 11, "(JPN) Tracking Intercompany Transfers (Shukkou)," Indicating the Home or Host Compensation Owner, page 304

Setting Up Employee Data for Intercompany Transfers

This section discusses how to:

- Track intercompany transfers.
- Indicate the home or host compensation owner.

Note. This section discusses the basics of how to set up an intercompany transfer. See the next section for detailed examples of data entry and maintenance.

See Also

Chapter 11, "(JPN) Tracking Intercompany Transfers (Shukkou)," Entering and Maintaining Home and Host Data for Intercompany Transfers, page 304

Tracking Intercompany Transfers

Whenever you need to track intercompany transfers, whether as a home company or a host company, set up the employee data:

- Enter a new job record with standard actions such as transfer, termination, and hire, but with specific action reasons that are related to intercompany transfers.
- Complete the intercompany transfer fields in the Japan section of the Work Location page.

Selecting Actions and Reasons for Intercompany Transfers

These are the actions and reasons that you use on the Administer Workforce pages when you work with intercompany transfers:

Action	Reason
Transfer	Intercompany transfer.

Action	Reason
	Completion of intercompany transfer.
Termination	Permanent intercompany transfer.
	Completion of (hosted) intercompany transfer.
Hire	Temporary intercompany transfer.
	Permanent intercompany transfer.

See Also

Chapter 5, “Increasing the Workforce,” Entering Employee Job Location and Position Information, page 89

Indicating the Home or Host Compensation Owner

You can use the Pay Group field on the Job Data - Payroll page to identify whether the home or the host company is responsible for paying an employee on temporary intercompany transfer. If the home company is paying, put the employee in a standard pay group with other employees. If the host company is paying, put the employee in a designated dummy pay group that has no payroll processing implications for your (home) company.

Similarly, if you are the host for a temporary intercompany transfer, put the employee in a standard pay group if you are paying the employee, or into a designated dummy pay group if the home company is paying the employee.

Note. When the Payroll System field is set to *Other* on the Job Data - Payroll page, the Pay Group field is not a required field. You can use the field as described previously whether it is required or not.

See Also

Chapter 5, “Increasing the Workforce,” Entering Payroll Processing Data, page 109

Entering and Maintaining Home and Host Data for Intercompany Transfers

The following three sets of scenarios detail the data input and maintenance requirements by the home or host company. Sets B and C are similar, but reflect different security conditions.

The sets of scenarios are:

- Set A: Single Company Using a Single PeopleSoft Enterprise HRMS Database.
- Set B: Multiple Companies Using a Single PeopleSoft Enterprise HRMS Database (with security restrictions).

- Set C: Multiple Companies Using a Single PeopleSoft Enterprise HRMS Database (without security restrictions).

Single Company Using a Single PeopleSoft Enterprise HRMS Database: Scenarios A1-8

This section discusses several scenarios for a single company that uses a single human resources database.

Note. Additional Employment Instance is not used for any scenarios in set A. The scenarios in set A are applicable where multiple companies use a single human resources database but the information—for the home or host company relevant to a particular intercompany transfer—is not stored in that database.

Scenario A1: Temporary Intercompany Transfer (TICT)

Home Company Inputs

Table	Fields	Input
JOB	Action	Transfer.
	Reason	Temporary intercompany transfer.
	Department ID	Department ID that indicates temporary intercompany transfer.
	Pay Group	If the home company is responsible for compensation, there is no change to the pay group. If not, enter a dummy pay group to indicate that the host (other) company is responsible for compensation. There is no processing associated with dummy pay groups.
JOB_JR	Intercompany Transfer Flag	Host company information.
	Business Unit code	If the home company is a normal (internal) company, enter the code. If not, leave this field blank.
	Company code	If the Host company is a normal (internal) company, enter the code. If it is an external company, enter the ICT Company code.
	Department code	If the host company is a normal (internal) company, enter the department code. If it is an external company, enter the ICT Department code.
	Sup Lvl ID code	If the host company is a normal (internal) company, enter the supervisor level ID. If it is an external company, enter the ICT supervisor level ID.

Table	Fields	Input
	ICT Start Date	Actual start date of intercompany transfer.
	ICT End Date	Expected end date of ICT.

Host Company Inputs

Not applicable.

Scenario A2: Completion of TICT

Home Company Inputs

Table	Fields	Input
JOB	Action	Transfer.
	Reason	Completion of ICT.
	Department ID	Employee's home company department.
	Pay Group	Employee's home company pay group.

Host Company Inputs

Not applicable.

Scenario A3: Permanent Intercompany Transfer (PICT)

Home Company Inputs

Table	Fields	Input
Job	Action	Termination.
	Reason	Permanent intercompany transfer.
JOB_JR	Intercompany Transfer Flag	Host company information.
	Business Unit (code)	If the home or host company is a normal (internal) company, enter the code. If not, leave this field blank.
	Company code	If the host company is a normal (internal) company, enter the code. If it is an external company, enter the ICT Company code.

Table	Fields	Input
	Department code	If the host company is a normal (internal) company, enter the Department code. If it is an external company, enter the ICT Department code.
	Sup Lvl ID code	If the host company is a normal (internal) company, enter the supervisor level ID. If it is an external company, enter the ICT supervisor level ID.

Host Company Inputs

Not applicable.

Scenario A4: Hosting Temporary Intercompany Transfer (TICT)

Home Company Inputs

Not applicable.

Host Company Inputs

Table	Fields	Input
JOB	Action	Hire.
	Reason	Temporary intercompany transfer.
	Pay Group	If host (own) company is responsible for compensation, enter the pay group in which you want the employee. If not, enter a dummy pay group to indicate that the home (other) company is responsible for compensation.
	Employee Class	Hosting intercompany transfer.
JOB_JR	Intercompany Transfer Flag	Home company information.
	Business Unit (code)	If the home or host company is a normal (internal) company, enter the code. If not, leave this field blank.
	Company code	If the host company is a normal (internal) company, enter the code. If it is an external company, enter the ICT Company code.
	Department code	If the host company is a normal (internal) company, enter the Department code. If it is an external company, enter the ICT Department code.

Table	Fields	Input
	Sup Lvl ID code	If the host company is a normal (internal) company, enter the supervisor level ID. If it is an external company, enter the ICT supervisor level ID.
	ICT Start Date	Actual start date of intercompany transfer.
	ICT End Date	Expected end date of ICT.

Scenario A5: Completion of Hosting TICT

Home Company Inputs

Not applicable.

Host Company Inputs

Table	Fields	Input
JOB	Action	Termination.
	Reason	Completion of TICT.

Scenario A6: Hosting Permanent Intercompany Transfer (PICT)

Home Company Inputs

Not applicable.

Host Company Inputs

Table	Fields	Input
JOB	Action	Hire.
	Reason	Permanent intercompany transfer.
	Pay Group	Pay group in which you want this employee.
	Employee Class	Hosting intercompany transfer.
JOB_JR	Intercompany Transfer Flag	Home company information.

Table	Fields	Input
	Business unit code	If the home or host company is a normal (internal) company, enter the code. If not, leave this field blank.
	Company code	If the host company is a normal (internal) company, enter the code. If it is an external company, enter the ICT Company code.
	Departmen: code	If the host company is a normal (internal) company, enter the Department code. If it is an external company, enter the ICT Department code.
	Sup Lvl ID code	If the host company is a normal (internal) company, enter the supervisor level ID. If it is an external company, enter the ICT supervisor level ID.

Multiple Companies Using a Single PeopleSoft Enterprise HRMS Database: Scenarios B1-6

This section discusses several scenarios for multiple companies that use a single human resources database.

Conditions:

- Both home and host companies use the same database and business unit, company, department ID, and supervisor level ID.
- Security settings make it impossible for either company to access the other's information.

Scenario B1: Temporary Intercompany Transfer

Home Company Inputs (Temporary Intercompany Transfer - TICT)

Table	Fields	Input
JOB	Action	Transfer.
	Reason	Temporary intercompany transfer.
	Department ID	Dummy ID that indicates temporary intercompany transfer.
	Pay Group	If home (own) company is responsible for compensation, there is no change to the pay group. If not, enter a dummy pay group to indicate that the host (other) company is responsible for compensation. There is no processing associated with dummy pay groups.

Table	Fields	Input
	Job Indicator	Because the host company enters information by using concurrent jobs functionality, it is *Secondary.*
JOB_JR	Intercompany Transfer Flag	Host company information.
	Business unit code	Business unit to which the employee will be sent.
	Company code	Host company to which the employee will be sent.
	Department ID code	Host department in which the employee will be.
	Sup Lvl ID code	Supervisor level that employee will take in host company.
	ICT Start Date	Actual start date of intercompany transfer.
	ICT End Date	Expected end date of ICT.

Host Company Inputs (Hosting Temporary Intercompany Transfer - TICT)

Table	Fields	Input
JOB	Employee ID	If accessing through Add Employment Instance, use the same employee ID as the home company. If accessing through the Add a Person page, assign a new ID.
	Employee Record #	Employee ID is *1* or higher.
	Action	Hire.
	Reason	Temporary intercompany transfer.
	Company	Host company.
	Department ID	Host department in which the employee will be.

Table	Fields	Input
	Pay Group	If host (own) company is responsible for compensation, the pay group in which you want this employee. If not, enter a dummy pay group to indicate that the home (other) company is responsible for compensation.
	Employee Class	Hosting intercompany transfer.
	Job Indicator	Primary.
JOB_JR	Intercompany Transfer Flag	Home company information.
	Business unit code	Employee's home business unit.
	Company code	Employee's home company.
	Department ID code	Employee's home department.
	ICT Start Date	Actual start date of intercompany transfer.
	ICT End Date	Expected end date of ICT.

Scenario B2: Completion of Temporary Intercompany Transfer

Home Company Inputs (Completion of Temporary Intercompany Transfer)

Table	Fields	Input
JOB	Action	Transfer.
	Reason	Completion of temporary intercompany transfer.
	Department ID	Home company department in which the employee will be.
	Pay Group	Pay group for home company that is responsible for compensation.
	Job Indicator	Primary.

Host Company Inputs (Completion of Hosting Temporary Intercompany Transfer)

Table	Fields	Input
JOB	Action	Termination.
	Reason	Completion of temporary intercompany transfer.
	Job Indicator	Secondary.

Scenario B3: Permanent Intercompany Transfer

Home Company Inputs (Permanent Intercompany Transfer − PICT)

Table	Fields	Input
JOB	Action	Termination.
	Reason	Permanent intercompany transfer.
	Job Indicator	Because the host company entered information by using concurrent jobs functionality, it is *Secondary.*
JOB_JR	Intercompany Transfer Flag	Host company information.
	Business unit code	Business unit to which the employee is transferring.
	Company code	Host company to which the employee is transferring.
	Department ID code	Employee's host department.
	Sup Lvl ID code	Supervisor level that employee will have in host company.

Host Company Inputs (Hosting Permanent Intercompany Transfer - PICT)

Table	Fields	Input
JOB	Employee ID	If accessing through Add Employment Instance, use the same employee ID as the home company. If accessing through the Add a Person page, assign a new ID.
	Employee Record #	If accessing through the Concurrent Jobs page, the employee ID is *1* or higher.

Table	Fields	Input
	Action	Hire.
	Reason	Permanent intercompany transfer.
	Pay Group	Regular host company pay group in which the employee will be.
	Employee Class	Hosting intercompany transfer.
	Job Indicator	Primary.
JOB_JR	Intercompany Transfer Flag	Home company information.
	Business Unit code	Business unit from which the employee comes.
	Company code	Home company to which the employee belongs.
	Department ID code	Home department in which the employee was.

Multiple Companies Using a Single HRMS Database: Scenarios C1-6

This section discusses several scenarios for multiple companies that use a single PeopleSoft Enterprise HRMS database.

Conditions:

- Both home and host companies use the same database and business unit, company, department ID, and supervisor level ID.
- Security settings allow all companies to access each other's information.

Scenario C1: Temporary Intercompany Transfer

Home Company Inputs (Temporary Intercompany Transfer - TICT)

Table	Fields	Input
JOB	Action	Transfer.
	Reason	Temporary intercompany transfer.
	Department ID	Dummy ID that indicates temporary intercompany transfer.

Table	Fields	Input
	Pay Group	If home (own) company is responsible for compensation, there is no change to the pay group. If not, enter a dummy pay group to indicate that the host (other) company is responsible for compensation.
	Job Indicator	Because the host company enters information by using concurrent jobs functionality, it is *Secondary.*
JOB_JR	Intercompany Transfer Flag	Host company information.
	ICT Start Date	Actual start date of intercompany transfer.
	ICT End Date	Expected end date of ICT.

Host Company Inputs (Hosting Temporary Intercompany Transfer - TICT)

Table	Fields	Input
JOB	Employee ID	If accessing through Add Employment Instance, use the same employee ID as the home company. If accessing through the Add a Person page, assign a new ID.
	Employee Record #	If accessing through the Concurrent Jobs page, the employee ID is *1* or higher.
	Action	Hire.
	Reason	Temporary intercompany transfer.
	Company	Host company.
	Department ID	Host department in which the employee will be.
	Pay Group	If host (own) company is responsible for compensation, the pay group in which you want this employee. If not, enter a dummy pay group to indicate that the home (other) company is responsible for compensation.
	Employee Class	Hosting intercompany transfer.

Table	Fields	Input
	Job Indicator	Primary.
JOB_JR	Intercompany Transfer Flag	Home company information.
	ICT Start Date	Actual start date of intercompany transfer.
	ICT End Date	Expected end date of ICT.

Scenario C2: Completion of Temporary Intercompany Transfer

See Scenario B2: Completion of Temporary Intercompany transfer.

Scenario C3: Permanent Intercompany Transfer

Home Company Inputs (Permanent Intercompany Transfer - PICT)

Table	Fields	Input
JOB	Action	Termination.
	Reason	Permanent intercompany transfer.
	Job Indicator	Because the host company entered information by using concurrent jobs functionality, it is *Secondary.*
JOB_JR	Intercompany Transfer Flag	Host company information.

Host Company Inputs (Hosting Permanent Intercompany Transfer - PICT)

Table	Fields	Input
JOB	Employee ID	If accessing through Add Employment Instance, use the same employee ID as the home company. If accessing through the Add a Person page, assign a new ID.
	Employee Record #	If accessing through the Concurrent Jobs page, the employee ID is *1* or higher.
	Action	Hire.

Table	Fields	Input
	Reason	Permanent intercompany transfer.
	Pay Group	Regular host company pay group in which the employee will be.
	Employee Class	Hosting intercompany transfer.
	Job Indicator	Primary.
JOB_JR	Intercompany Transfer Flag	Home company information.

Working with Search Page Security

This section discusses how department security (Search Page Security on PERS_SRCH_GBL and EMPLMT_SRCH_GBL) works when you use the system's Multiple Jobs functionality.

Note. There are many different ways to set up this security. Your specific business requirements determine how you set up yours. This section describes just one example of how you may set up your security.

This information makes the following assumptions:

- You want to manage two companies in one database: company A and company B, where company B is a subsidiary of company A.
- The entire organization of company A belongs to business unit A (BUA) and the entire organization of company B belongs to business unit B (BUB).
- You have defined two setIDs: SIDA and SIDB for companies A and B respectively.
- Neither company's workers have meaningful employee IDs; that is, the ID does not identify the company.

  For example, a person with employee ID 1002 may belong to company B, whereas workers with employee IDs 1001 and 1003 belong to company A.
- There are two users: USR1 and USR2.

  USR1 has the right to access the sales department of company A and USR2 has the right to access the sales department of company B.

Following these assumptions, the next table represents the job rows for the person with employee ID 1001, who:

- Was originally hired by company A.
- Went on an temporary intercompany transfer to company B (scenario B1).
- Returned to company A (scenario B3).
- Went on permanent intercompany transfer to company B (scenario B6).

Key: In this table, Empl Rec# = Employment Record Number, Co. = Company, ICT = InterCompany Transfer, A/R = Action/Reason, D = Department, and J = Job Indicator.

Event	Empl Rec#0	Empl Rec#1
1. Hired by company A	A/R − Hired Co. − A D − Sales J − Primary	NA
2. Temporary ICT to company B	A/R − Transfer/ICT Co. − A D − Human Resources J − Secondary	A/R − Hire/Temporary ICT Co. − B D − Sales J − Primary
3. Returned to company A	A/R −Transfer/Completion of Temporary ICT Co. − A D − Sales J − Primary	A/R −Termination/Completion of Temporary ICT Co. − B D − Sales J − Secondary
4. Permanent ICT to company B 4a. Terminated from company A 4b. Hired (or rehired) by company B	A/R − Termination / Permanent ICT Co. − A A/R − Hired or rehired / Permanent ICT Co. − B D − Sales J − Primary	NA

This is how departmental security (search page security) works for users who have security right access to a department. Users can do one of the following:

- Access all employees whose current jobs belong to that department when PERS_SRCH_GBL is used as the search table.
- Access the particular record numbers for employees whose current job is in the department when EMPLMT_SRCH_GBL is used as the search table.

This table shows which users have access to which data at each of the four events described for employee 1001:

Event	Personal Data	Empl Rec#0 Data	Empl Rec#1 Data
	PERS_SRCH_GBL	EMPLMT_SRCH_GBL	EMPLMT_SRCH_GBL
1. Hired by company A	USR1	USR1	NA
2. Temporary ICT to company B	USR1 and USR2	USR1	USR2
3. Returned to company A	USR1 and USR2	USR1	USR2
4a. Permanent ICT to company B 4b. Hired or rehired by company B	USR1 and USR2 USR2	USR1 USR2	USR2 USR2

Running the Intercompany Transfer Report

This section explains how to run the JPN Completion of IC Transfer report.

Page Used to Run the Intercompany Transfer Report

Page Name	Object Name	Navigation	Usage
JPN Completion of IC Transfer	RUNCTL_PER065_JPN	Administer Workforce, Administer Workforce (GBL), Report Lcl, JPN Completion of IC Transfer	Run the JPN Completion of IC Transfer report (PER065JP), which lists employees on temporary intercompany transfer. The home company uses this report to confirm employees who are anticipated to return from temporary intercompany transfer.

CHAPTER 12

(JPN) Mass Organization Change

This chapter provides an overview of mass transfers in Japan and discusses how to:

- Change plans for organizational restructure.
- Employee placement plans with the new organization structure.
- Finalizing organization and employee placement plans.

Understanding Mass Organization Change

In Japan, companies periodically change organization structure with the result that employees are transferred to new roles and departments with the revised structure. This is referred to as mass period transfers (*Teiki Ido*). With rapid changes in the business environment, organization changes and mass transfers play an integral part for businesses in Japan and take place in shorter cycles.

Many companies in Japan employ a split HR organizational structure made up of division HR and corporate HR. Corporate HR is a human resource department placed in the main company headquarters of a large company or group of companies. Division HR departments are HR departments within a business unit or division. The division HR department reports to the corporate HR department (and the general manager of the business unit, subsidiary companies and so on). HR business partners are included within this schema.

Division HR formulates and instigates activities such as organizational change strategy, employee placement, employee review at a level within their department. When division HR finishes their part of the work, they report to corporate HR. Corporate HR then coordinate and adjust activities and placement among departments based on the company strategy.

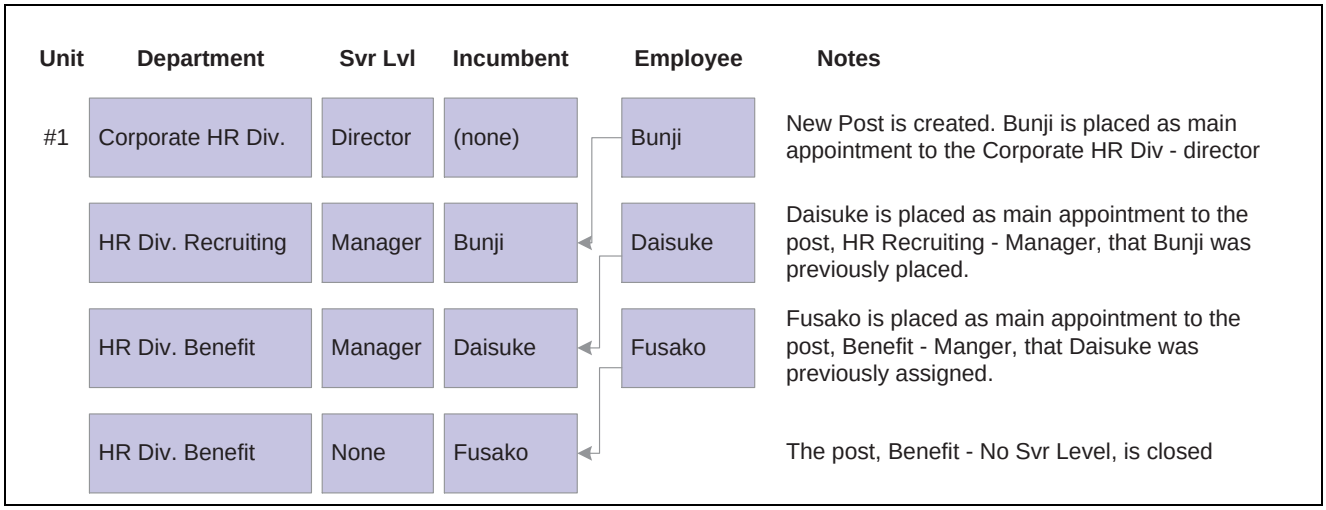
In Japan, job rotation is viewed as an integral part of employee development. HR departments intentionally transfer certain employees to multiple departments over a certain period of time. This practice is aimed at developing generalists who are knowledgeable with several jobs within a company. It is viewed that this creates better experience and broader vision of a company. The period of service in a department is often used as a selection criteria for job rotation.

Employees who are marked as transferable are said to be transfer candidate employees.

When restructuring an organization, *Tamatsuki*placement is usually conducted along the same job level. *Tamatsuki* placement can also occur when an employee has requested a transfer. Job rotation for higher level management positions are also done across the same job level. This starts a job transfer chain and should be explained.

The Japanese word, *Tamatsuki*, originally means ball (*tama*) and hit (*tsuku*) like billiards and also means billiards in Japanese. To start *tamatsuki* placement, a certain employee is assigned to a newly created post (a post is equivalent to a supervisor level role (known as *yakushoku*) within a department. This term is different to the term position which consists of job within a department.) The existing post is now vacated and is therefore available to be filled. In the lower part of the graphic, Bunji/Peter, is assigned a new post (New Post), and Post A becomes vacant. Then, other employees are assigned to similar positions at the same level by the concatenating effect of a person moving from one position to another and leaving the existing position vacant. In the graphic, Daisuke/John is assigned Post A, and Fusako/Catherine is assigned Post B and Hisao/Robin is assigned Post C. The continuing process, triggered by the new post, is likened by the Japanese, to hitting billiard balls.

This graphic shows an overview of *tamatsuki* placement:



Tamatsuki placement

Note. This feature does not support transfer between business units as table sets may differ from one business unit to the next.

Change Plans for Restructuring An Organization

This section provides an overview of change plans for restructuring an organization and discusses the pages used for this functionality.

Understanding Change Plans for Restructuring An Organization

In order to plan a new organization, you need to be able to enter information about the new structure into the system. The information required is the organization structure with department hierarchy, size by supervisor level, job code, grade and so on. The structures can store multiple patterns by changing the name of the structure. After entering this information for a plan, a visual chart needs to be available for checking.

Organizational Structure

The existing and planned organizational structures are built using PeopleSoft Tree Manager. Tree Manager is the ideal graphical user interface to create organizational structures as they can be seen visually and departments can be dragged and dropped. To create a new organizational structure using Tree Manager, the existing tree for the current organizational structure can be copied and given a different name.

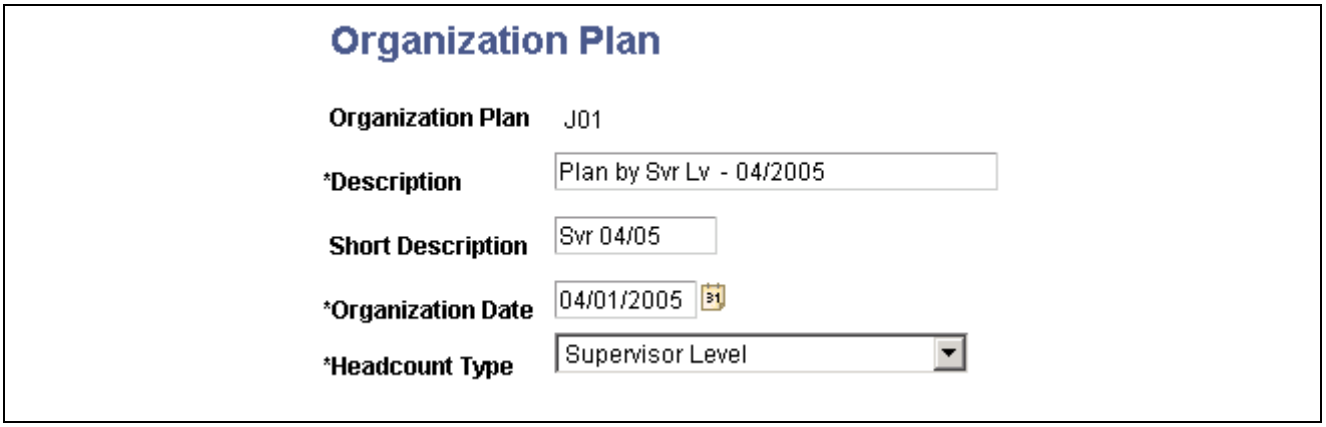
Note. In terms of using an initial tree structure, PeopleSoft recommends customers create a tree based on the DEPT_SECURITY tree, but with a different name. Then, after the tree has been approved, rename the tree back to DEPT_SECURITY with a new effective date.

Pages Used For Organizational Structures

Page Name	Object Name	Navigation	Usage
Tree Manager	PSTREEMGR	Tree Manager, Tree Utilities, Tree Manager	Create a tree for the new organization structure or base and copy the new tree on the existing organization structure's tree. Add departments using the Tree Manager functionality.
Organization Plan	IDO_ORG_PLAN_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Organization Plan	Set up IDO organization plans.
Headcount Plan by Department	IDO_HC_DEPT_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Headcount Plan by Department	Specify headcount targets by department.
Headcount Plan Listing	RC_IDO_HC_RPT_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Headcount Plan Listing	Use this page to run a report that compares the headcount goals established for departments with the simulated result of the organization plan.

Organization Plan

Access the Organization Plan page.



IDO Organization Plan page

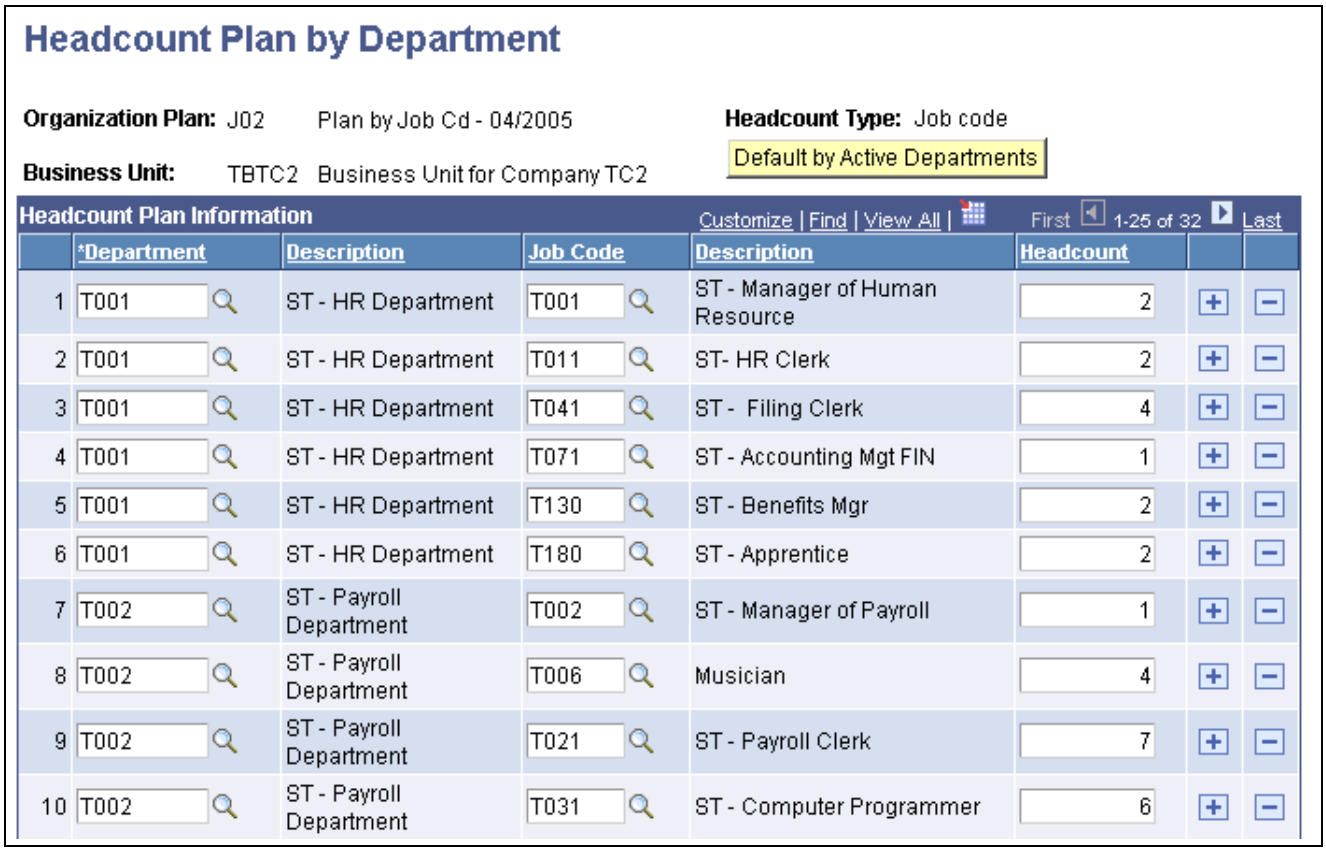
An Organization Plan allows a customer to track several different ways to reorganize the company. After running reports modeling the different options, the customer can then select one of the Organization Plans to be the *official* plan that is used, and use that one to insert into the Job record.

Organization Date Enter the date from which the new organization plan will come into effect.

Headcount Type Choose *Job Code*, *Sal Admin Plan/Grade* or *Supervisor Level* to specify the Headcount Type.

Headcount Plan by Department

Access the Headcount Plan by Department page.



Headcount Plan by Department

Organization Plan: J02 Plan by Job Cd - 04/2005 **Headcount Type:** Job code

Default by Active Departments

Business Unit: TBTC2 Business Unit for Company TC2

Headcount Plan Information — Customize | Find | View All | First 1-25 of 32 Last

	*Department	Description	Job Code	Description	Headcount
1	T001	ST - HR Department	T001	ST - Manager of Human Resource	2
2	T001	ST - HR Department	T011	ST- HR Clerk	2
3	T001	ST - HR Department	T041	ST - Filing Clerk	4
4	T001	ST - HR Department	T071	ST - Accounting Mgt FIN	1
5	T001	ST - HR Department	T130	ST - Benefits Mgr	2
6	T001	ST - HR Department	T180	ST - Apprentice	2
7	T002	ST - Payroll Department	T002	ST - Manager of Payroll	1
8	T002	ST - Payroll Department	T006	Musician	4
9	T002	ST - Payroll Department	T021	ST - Payroll Clerk	7
10	T002	ST - Payroll Department	T031	ST - Computer Programmer	6

Headcount Plan by Department page

This page is used to track goals by department. For example, let's say that currently you have two people in department 100. After your reorganization is finished, you want four people in that department. So you enter the number *4* for department 100 on this page. You then perform your transfers. After your reorganization is finished (but before you insert into the Job record), you can then run the Headcount Plan Listing (PER071JP.SQR) report to see if your transfers have increased the headcount in the department from two to four.

Default by Active Departments Click the Default by Active Department button to fill the Headcount Plan Information grid with data from the active departments.

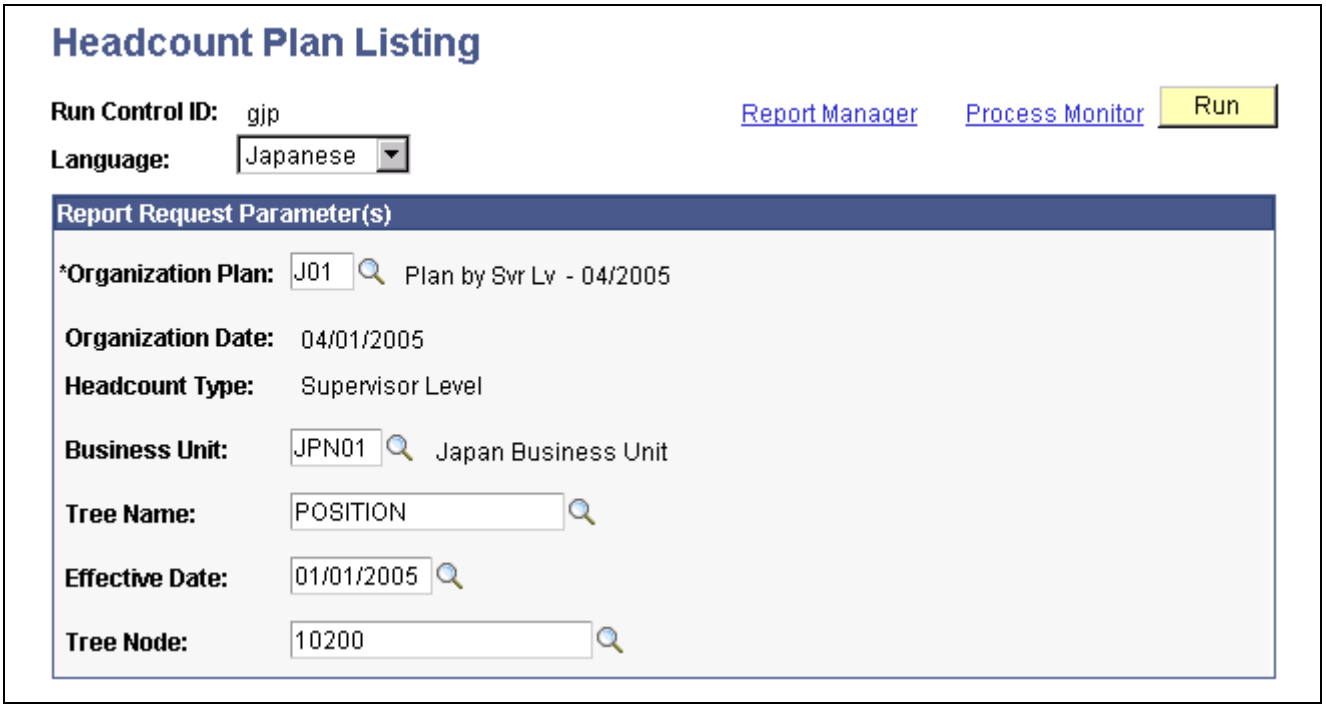
As well as using the Default by Active Departments button, users can enter the headcount for each department.

Note. This page provides a lower level of detail than the Headcount by Department page. It also breaks it down by Supervisor Level, Jobcode, or Grade. So you may currently have two headcount in department 100, one with a supervisor level of S10, and one with a supervisor level of S20. You could set it to two for S10, and two for S20, giving a total headcount of four for the department.

Note. If a user does not want to use headcount planning, then they do not enter any data on the page Headcount Plan by Department page for that organization plan.

Headcount Plan Listing

Access the Headcount Plan Listing page.



Headcount Plan Listing page

Enter values on this page that will be used to compare the headcount goals established for departments with the simulated result of the organization plan.

Employee Placement Plans With The New Organization Structure

This section provides an overview of employee placement plans with the new organizational structure and discusses the pages used for this functionality.

Understanding Employee Placement Plans

There are multiple ways to create employee placement plans. The first way is to use the Transfer Entry by Department page. With this method, users enter the placement by department.

The second method is to use the Transfer Entry with Trees page. Users can see the current organization structure and placement, and enter plans.

Methods one and two are similar in that you create an *Ido* candidate listing, use the Transfer Entry by Department or Transfer Entry with Trees pages, and then use the Transfer Data Maintenance page if required.

The third method is the *Tamatsuki* Transfer method to enter placements, but the data is entered based on the information talked of earlier and relies on the placement plan data. The *Tamatsuki* Transfer is an optional step.

Users can then check, undo, and adjust placements using the Transfer Data Maintenance page.

Using this method you create an Ido candidate listing, use the Transfer Entry by Department or Transfer Entry with Trees pages, use the *Tamatsuki Transfer Candidate Entry, Tamatsuki Transfer Entry, Tamatsuki Placement Check List and Tamatsuki to Transfer Record pages*, and then use the Transfer Data Maintenance page if required.

Security setup does not prevent users from transferring employees. As a result, it is important to limit access to the Mass Employee Transfer page to trusted users only.

Security access is invoked whenever a user clicks on the View links on the Transfer Entry by Department and Transfer Entry by Tree pages.

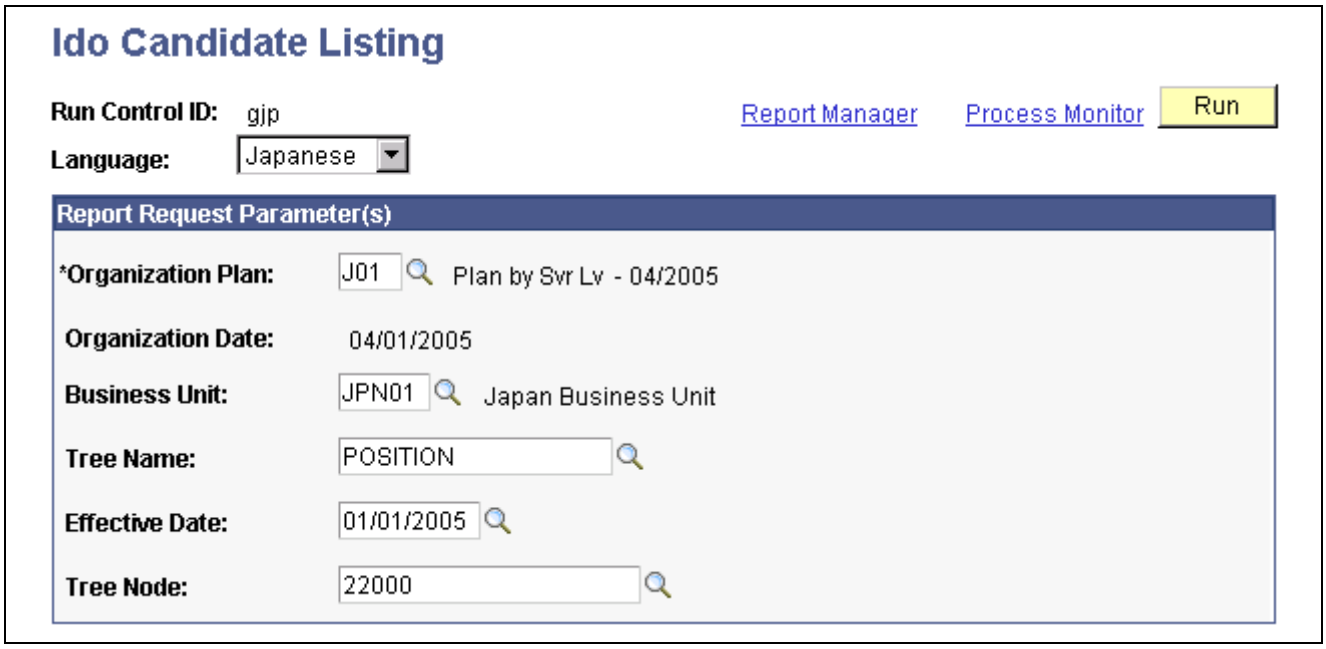
Note. On the Installation Table — Country Specific page, the Additional Appointment Enabled field must be selected, for this and other functionality to be used.

Pages Used For Employee Placement Plans

Page Name	Object Name	Navigation	Usage
Ido Candidate Listing	RC_IDO_EE_LIST_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Ido Candidate Listing	Run a report that lists current information for employees. It is used to help plan the future organization changes.
Transfer Entry by Department	IDO_MASS_TRANS_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Transfer Entry by Dept	Allows the mass transfer of employees from one department to another.
Transfer Entry with Trees	IDO_XFR_TREE_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Transfer Entry with Trees	Transfer employees between departments using trees.
Tamatsuki Transfer Candidates	IDO_CANDIDATE_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Tamatsuki Transfer Candidates	Specify a list of *Tamatsuki* candidates.
Tamatsuki Transfer Entry	IDO_TAMATSUKI_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Tamatsuki Transfer Entry	Assign *Tamatsuki* candidates to posts.
Tamatsuki Placement Check List	RC_IDO_TAM_CL_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Tamatsuki Placement Check List	This report summarizes the *Tamatsuki* transfers that are planned.
Tamatsuki to Transfer Record	RC_IDO_TAM_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Tamatsuki to Transfer Record	This application engine process copies data from the record IDO_TAMATSU_JPN to the record IDO_FUT_UPD_JPN.
Transfer Data Maintenance	IDO_MAINT_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Transfer Data Maintenance	Use this page to maintain the Future Update record.

Ido Candidate Listing

Access the Ido Candidate Listing page.

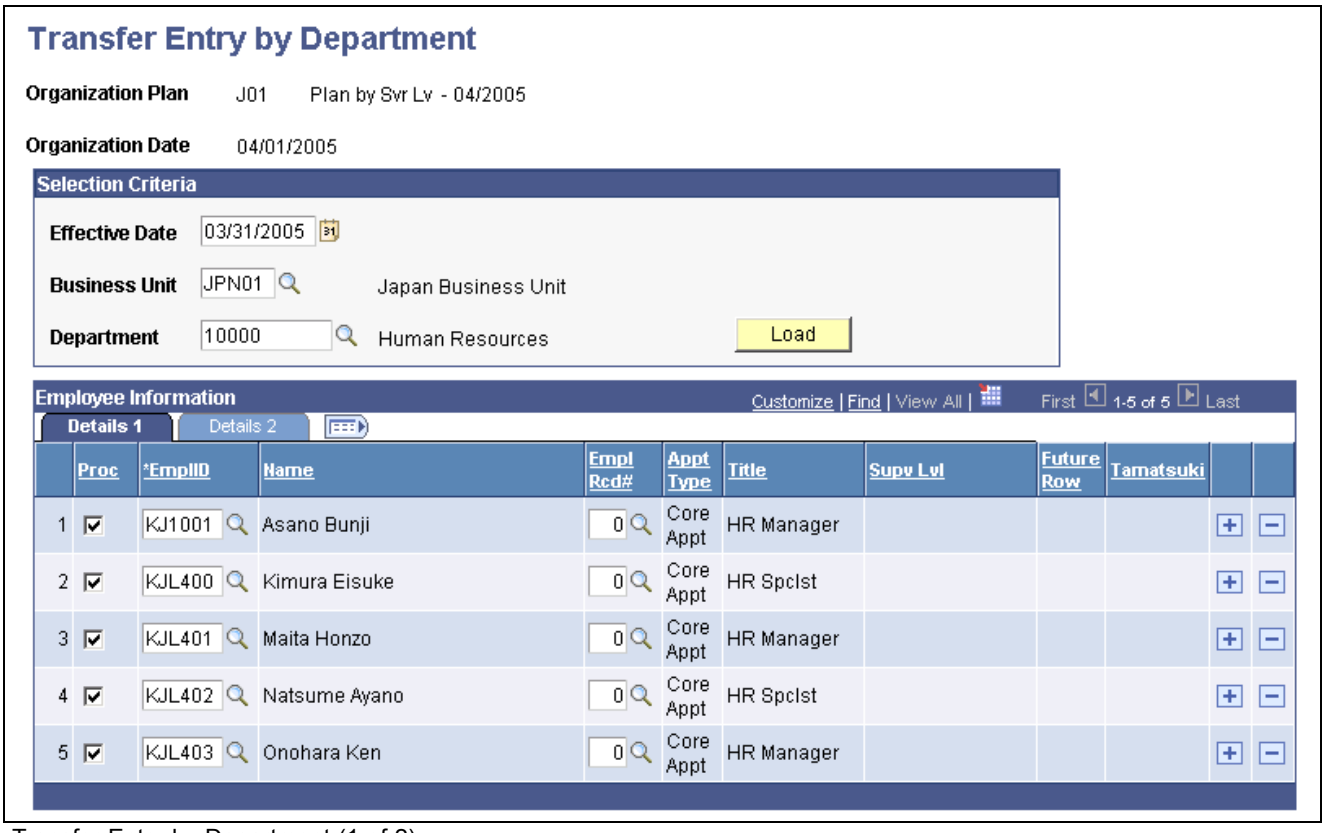


Ido Candidate Listing page

Enter the requisite fields to run a report that assists the user to determine which employees should be subject to a reorganization or *tamatsuki* placement.

Transfer Entry by Department

Access the Transfer Entry by Department page.



Transfer Entry by Department (1 of 2)

Transfer Entry by Department (2 of 2)

Use this page to mass transfer employees from one department to another.

Load Click the Load button to list the employees for a particular business unit and department that are available for transfer to another department.

Proc The Proc field defaults to being selected. Select this field to indicate that an employee will be transferred to another department or have certain information changed. When selected, changes are applied to that employee when the page is saved.

For example, department 100 is being closed. Half of the employees in that department will be assigned to department 110, and the other half will be assigned to department 120. The user enters this page and loads all of the employee in department 100. They then enter a transfer for department 110 in the lower group box. The user then deselects the employees in the list who should be transferred into department 120 instead. After saving the page, the

user can then enter a transfer for department 120, deselect the employees in 110, and reselect the employees that should be transferred to department 120.

Change the Following Fields

Action Select a value to change.

Reason Select a code to specify why the value is being changed.

Effective Date Enter a date to specify when the change comes into effect.

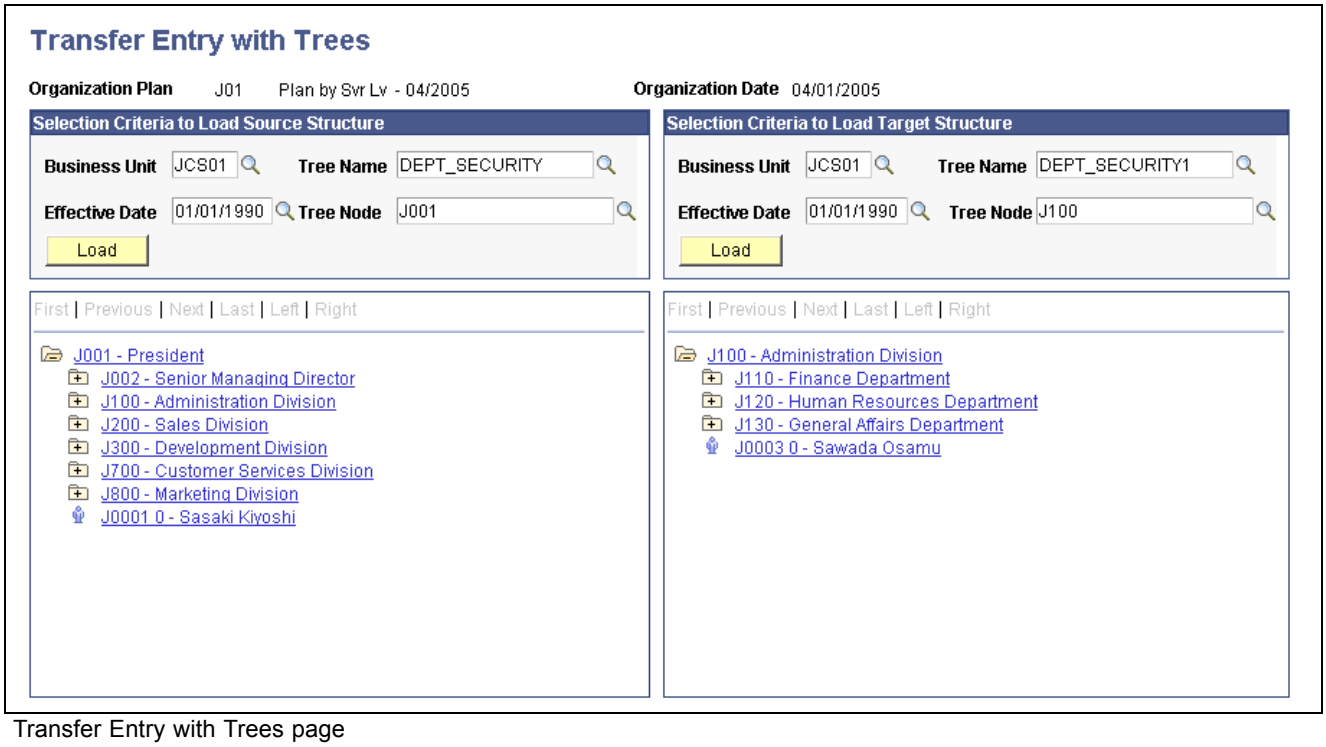
Business Unit, Department, Location Code, Supervisor Level, Job Code Enter values in these fields to specify new information for the employees selected.

Note. These fields should be left blank if a user does not want to change that data for the employees. For example, if you want to move employees from department 100 to 110, but want them to keep their old jobcode, you would leave the jobcode field blank on the page.

On the other hand, if you want to also assign all the employees to jobcode J200 as well as change their department, you would enter J200 in the Jobcode field.

Transfer Entry with Trees

Access the Transfer Entry with Trees page.



Transfer Entry with Trees page

If using the Transfer Entry with Trees page, each employee's transfer should be considered and decided upon well before using the page. Users have to decide on the location, supervisor level and jobcode as well as the action and reason.

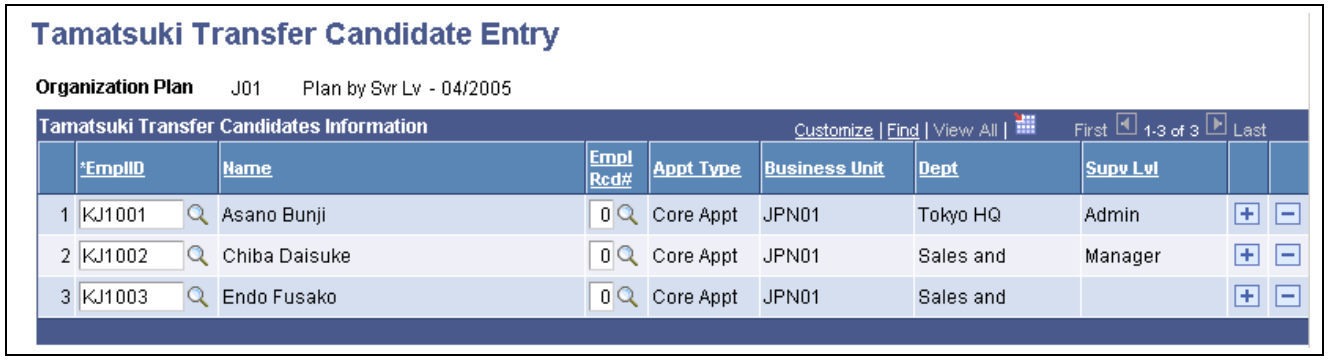
When using this page, users will most likely first enter information on the Transfer to Departments page. An employee would be selected first and then information entered in the Location, Supervisor Level, and Jobcode fields. Then select Transfer to Department.

On the Transfer Entry with Trees page, after you select values for the Business Unit, Tree Name, Effective Date and Tree Node fields for both the Selection Criteria to Load Source Structure and the Selection Criteria to Load Target Structure sections and click the respective Load buttons for each section, then use the page and repeat the entry in this way:

- Select an employee to be transferred from the Selection Criteria to Load Source Structure tree. When the user clicks the Department folder, all employees in the department are listed. When the user clicks on an employee, the related employee information is displayed on the Details 1 and Details 2 grid.
- Information can be changed and edited in the Details 1 and Details 2 grid.
- In the Change the Following Fields group box, the user enters values in the Location, Supervisor Level, Jobcode, Action and Reason fields.
- The user then selects a new department for the employee in the Selection Criteria to Load Target Structure tree.

Tamatsuki Transfer Candidates

Access the *Tamatsuki* Transfer Candidates page.



Tamatsuki Transfer Candidate Entry

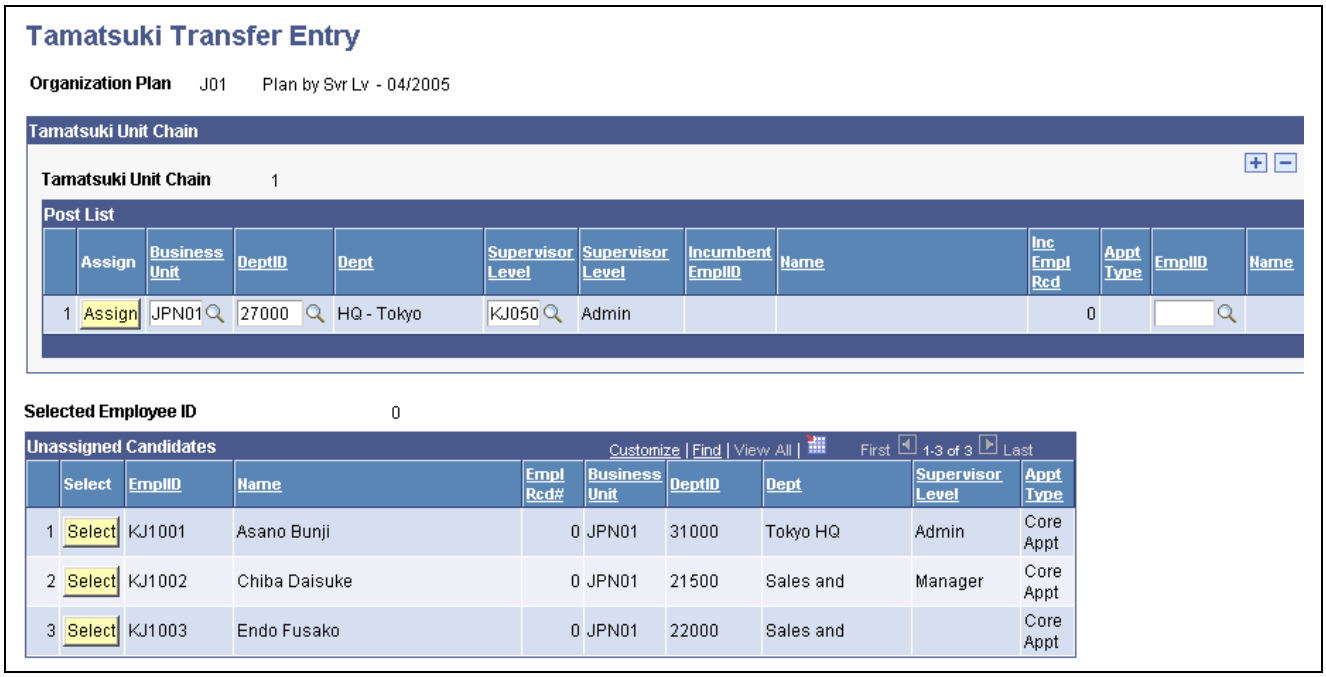
Enter employees who are potentially candidates for transfer using the *Tamatsuki* transfer method.

Note. To use the *Tamatsuki* functionality, you must use this page in order to start the *Tamatsuki* process and have employee ids appear in other pages.

Note. Once an employee has been assigned as a *Tamatsuki* transfer candidate, they cannot be transferred using the Transfer Entry by Department or Transfer Entry by Tree pages.

Tamatsuki Transfer Entry

Access the Tamatsuki Transfer Entry page.



Tamatsuki Transfer Entry page

Select In the Unassigned Candidates group box, click the Select button beside the row of the employee that will be assigned to a post. The Selected Employee ID field shows the currently selected employee.

Business Unit This field can only be entered for the first row. The next rows are inserted automatically based on the selected Employee's post.

DeptID This field can only be entered for the first row. The next rows are inserted automatically based on the selected Employee's post.

Supervisor Level This field can only be entered for the first row. The next rows are inserted automatically based on the selected Employee's post.

Ido Action Select *Open Post*, *Assigned*, *Close Post*, or *Create AA*.

Each value does the following:

- *Open Post* allows an employee to be assigned to a newly created post. *Open Post* can only be selected for the first row of the page. When an employee is placed in an open post, the system displays the previous position that the employee was assigned. A new row is automatically inserted so that another employee can be assigned to the open post.
- *Assigned* can be selected after selecting Open Post in a previous row. *Assigned* can be selected to assign an employee to an open post. This option can be selected for any row except the first.
- *Close Post* is used to terminate a post.
- *Create AA* is used to assign an employee as an additional appointment. There are two circumstances for an additional appointment. The first is that a post that was a main appointment previously, is changed to an additional appointment. The second is that a post that is an additional appointment, remains as an additional appointment.

Note. If the Additional Appointment Enabled field on the Installation — Country Specific page is not selected, additional appointment related data does not display on this page.

Assign Once all the required fields have entries, click the Assign button to assign the post to the selected employee. A row is inserted below the original entry and the *Tamatsuki* process can continue and another employee can be assigned to the vacated post or another post.

Note. When the user needs to change the middle of the *Tamatsuki* Chain (Unit), the user should delete the whole unit and enter information from the first row.

Note. There are no limitations on where the Business Unit, DeptID, or Supervisor Level can be entered. Normally, the standard process would be to only enter it on the first row, the user is able to enter different scenarios. For example, when using the Create AA option, the user will probably enter multiple posts and therefore inserting multiple rows. The Assign button performs two separate actions. If the Business Unit, DeptID, or Supervisor Level are entered for a row, the system assigns the selected employee to that post. However, if the Business Unit, DeptID, or Supervisor Level are left blank and not entered, it assigns the employee's current information as the post for that row.

Tamatsuki Placement Check List

Access the Tamatsuki Placement Check List page.

Tamatsuki Placement Check List page

To confirm placements per organization plan, this report displays a list that is used to ensure candidates have been placed in the required posts or conversely that posts have been assigned the correct candidates.

Tamatsuki to Transfer Record

Access the Tamatsuki to Transfer Record page.

Tamatsuki to Transfer Record page

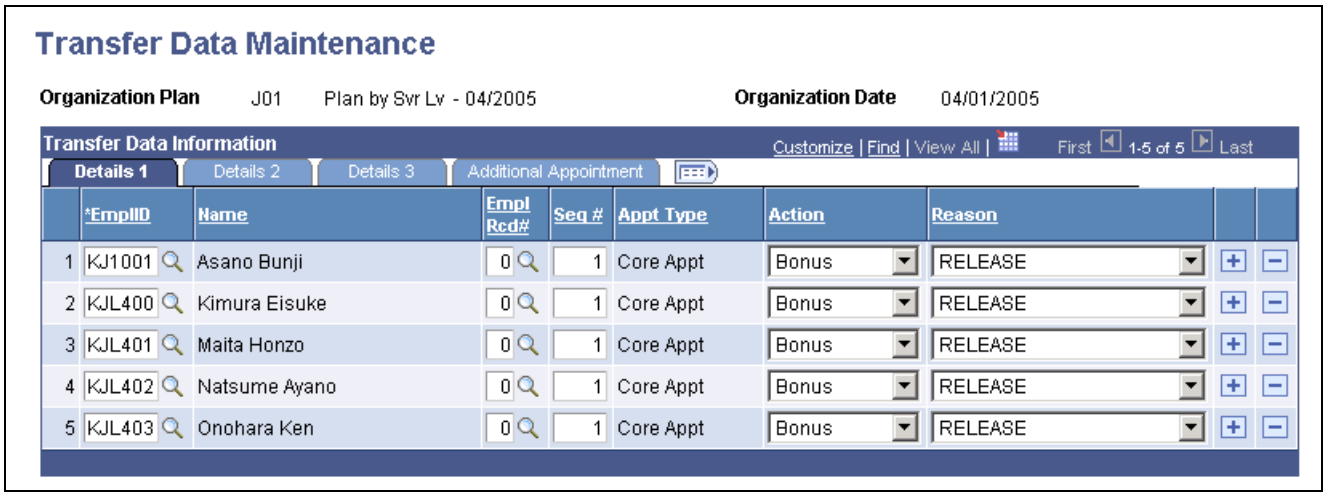
The purpose of this page is to prepare the *Tamatsuki* data to be inserted into Job.

Tamatsuki data is tracked by the IDO_TAMATSU_JPN process. This process moves the data to the IDO_FUT_UPD_JPN record. The Mass Employee Transfer process takes the data from the IDO_FUT_UPD_JPN record and inserts it into the Job record.

Note. This means that if the *Tamatsuki* to Transfer Record process is never run, the Mass Employee Transfer process will not insert the *Tamatsuki* post changes into the Job record.

Transfer Data Maintenance

Access the Transfer Data Maintenance page.



Transfer Data Maintenance page

This page allows various employee related information to be maintained and updated.

Note. Care should be taken in using this page. The primary purpose of this page is to delete unwanted transfers. It is not supposed to be used as a data entry page instead of using the other pages, as it contains fewer validations.

If actions beyond delete are done on this page, the user must be careful to validate their own entry.

Finalizing Organization and Employee Placement Plans

This section provides an overview of finalizing organization and employee placement plans and discusses the pages used for this functionality.

Understanding Finalizing Organization and Employee Placement Plans

In order to finalize organization and employee placement plans, a number of checks should be run to ensure that the intended structure is correct. These include checks for organization, employees, and departments.

HR administrators need to review the PER076JP report before the Mass Employee Transfer process is run to confirm that the changes are acceptable.

An error report can be run that generates a list of errors in employee placement.

Pages Used For Finalizing Organization and Employee Placement Plans

Page Name	Object Name	Navigation	Usage
Org Plan Checklist	RC_IDO_AUD1_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Org Plan Checklist Click the Run button and on the Process Scheduler Request page select the Employees in Inactive Department link or Open Post Checklist link.	Run the Employees in Inactive Department report to list employees who will be in inactive departments. Run the Open Post Checklist report to list the Open Post Checklist.
Headcount Plan Listing	RC_IDO_HC_RPT_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Headcount Plan Listing	Select the Actual Headcount Report to list the headcount of the new organization structure.
Future Employee Assignment List	RC_IDO_FUT_ASN_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Future Employee Assignment List	Use this report to simulate the way that the organization would look at an employee level if the user selected organization plan is processed.
Query Viewer	QUERY_VIEWER	Reporting Tools, Query, Query Viewer	Run the HR_TRANSAFTERORGCHG query to view a list of transferred employees that are effected after the organization change.
Ido Employee Listing	RC_IDO_AUD2_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Ido Employee Listing	This report summarizes the changes that will be made if the user selected organization plan is processed.
Mass Employee Transfer	RC_IDO_MASS_TR_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Mass Employee Transfer	Run this process to copy data from the Update Transfer Data table and insert it into the Job record.
Temporary Data Cleanup	RC_IDO_CLEAN_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Temporary Data Cleanup	Run this process to delete data associated with an organization plan.

Organization Plan Checklist

Access the Organization Plan Checklist page.

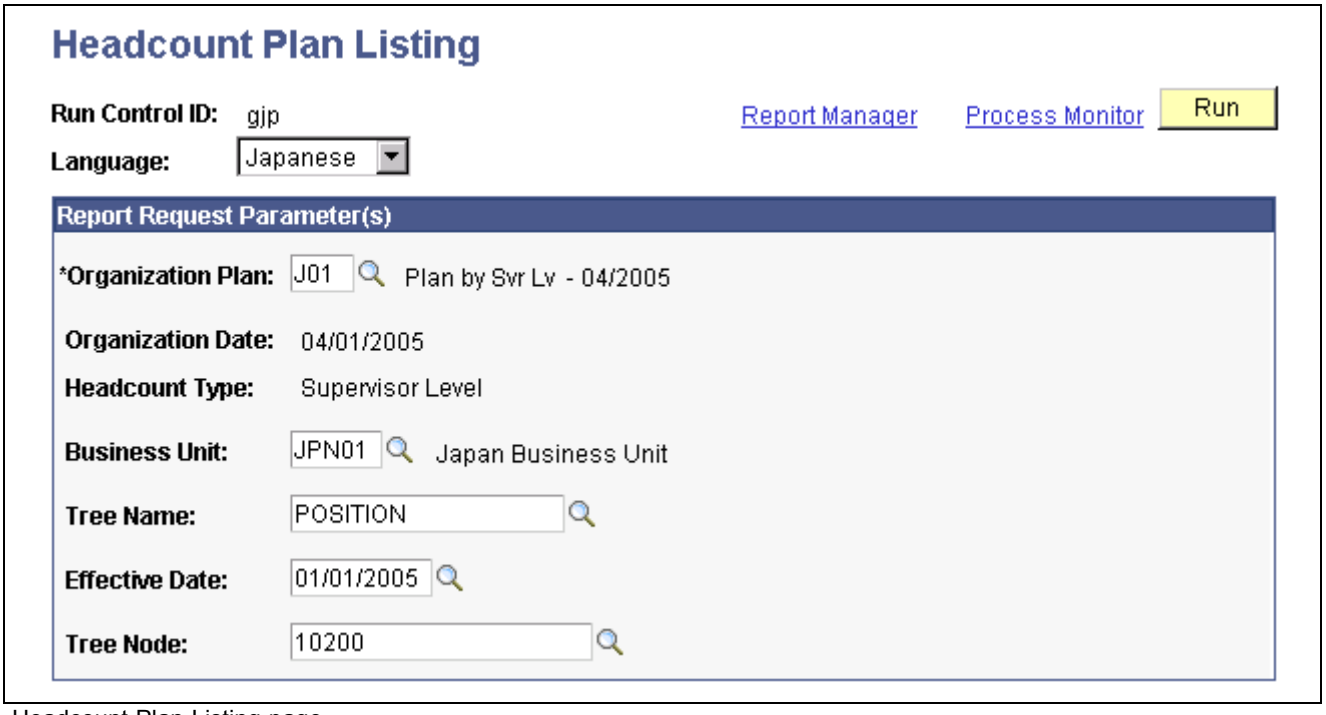
Organization Plan Checklist page

The user can run two types of reports from this page – the Employees in Inactive Department (PER069JP) report, and the Open Post Checklist report (PER070JP).

The purpose of the Open Post Checklist report is to list cases where the actual headcount in a department (after simulating the insert into the Job record) does not match the headcount goals entered in the Headcount Plan by Department page. The Open Post checklist report only lists headcount when the numbers between the goal and actual do not match.

Headcount Plan Listing

Access the Headcount Plan Listing page.

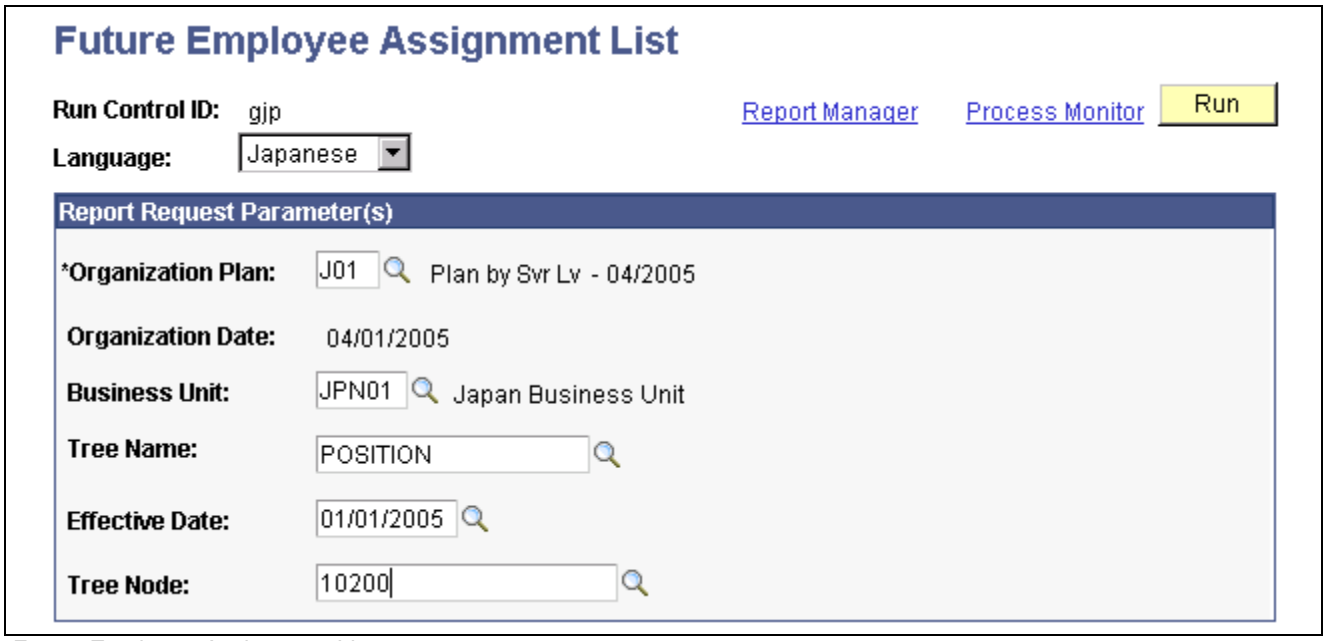


Headcount Plan Listing page

The Actual Headcount Report is used to list the actual headcount of an organization plan. This report is the same as the Open Post Checklist report, however it lists both matching and unmatching headcount numbers.

Future Employee Assignment List

Access the Future Employee Assignment List page.



Future Employee Assignment List page

Use this report to simulate the way that the organization would look at an employee level if the user selected organization plan is processed.

Transfers After Organization Change

Access Query Viewer and run the HR_TRANSAFTERORGCHG query.

The purpose of this query is to list employees with an effective date greater than the Organization Plan effective date. Employees listed on this report will require manual intervention after the Mass Employee Transfer process has been run.

For example, an employee has the following Job Data:

Date	Action	DeptID
January 1st, 2003	HIR	100
February 1st, 2004	PRO	200

The user decides to use the Ido functionality to transfer an employee to department 300 effective on January 1st, 2004, before the February 1st date that already exists in the employee's record. Effective February 1st, this transfer will be undone due to the future dated row. In most cases, the user will want to update the February 1st, 2004 date to reflect the new department of 300.

This query enables the user to be able to detect when this situation is occurring so that they can manually review these employees after processing the Ido job insert.

Ido Employee Listing

Access the Ido Employee Listing page.

Ido Employee Listing page

This report summarizes the changes that will be made if the user selected organization plan is processed.

Mass Employee Transfer

Access the Mass Employee Transfer page.

Mass Employee Transfer page

After deciding which organization plan is to be used, the batch Mass Employee Transfer process should be run. The process updates the database to reflect the organization plan.

This process copies data from the Update Transfer Data table and inserts it into the Job record.

If there are multiple job rows with the same effective date, the same effective date is used, however the effective sequence is incremented. For example, if you want to insert a row into the Job table, effective 1st January 2004, but a 1st January 2004 row already exists (with an effective sequence of *0*), the process will insert the new row with an effective sequence of *1*.

Temporary Data Cleanup

Access the Temporary Data Cleanup page.

Temporary Data Cleanup page

This process is normally run after the successful completion of the Mass Employee Transfer process. After the employees have been reorganized and their data inserted into the Job record, there is no longer a need to keep the planning information in the database.

For the organization plan selected, this process deletes rows from these tables:

- IDO_FUT_UPD_JPN
- IDO_TAMATSU_JPN
- IDO_CANDIDT_JPN
- IDO_HC_DEPT_JPN

CHAPTER 13

Updating Person and Job Information

This chapter provides an overview of the process of updating person and job information and discusses how to:

- Change personal data.
- Change job data.
- Locate personnel records.
- Change and delete IDs.
- Update personal data.
- Run personal data reports.
- Update job data.
- Update salary information.
- Refresh compensation.
- Run job data reports.
- View a summary of all job records.
- Refresh tables to facilitate reporting.
- Run database audits.

See Also

Chapter 5, "Increasing the Workforce," page 77

Understanding the Process of Updating Person and Job Information

A person's history with your organization may involve many job changes, such as promotions, leaves of absence, layoffs, retirement, pay rate changes, and so on. To maintain a complete history of the person's tenure, enter these changes regularly in PeopleSoft Enterprise Human Resources.

Updating Job Information When You've Implemented PeopleSoft Enterprise Payroll for North America

When you modify job data that affects payroll, the system marks payline records for recalculation where needed. When payroll is recalculated, the payroll system uses the new information.

Updating Job Information When You've Implemented PeopleSoft Enterprise Benefits Administration

When you modify job or employment data that affects benefits, the system sets the flags that control event maintenance to indicate that a change has occurred. Then, during the next event maintenance process, the system processes the event.

Changing Personal Data

To update personal information without changing job information, use the Modify a Person component (PERSONAL_DATA), which contains the same pages that you use to add personal data records with the exception of the Organizational Relationship page:

Component	Pages in the Group	Usage
Personal Data Workforce Administration, Personal Information, Modify a Person Workforce Administration, Personal Information, Biographical, Modify a Person Stock, Modify a Person Enterprise Learning, Modify a Person	Biographical Details (PERSONAL_DATA1) Contact Information (PERSONAL_DATA2) Regional (PERSONAL_DATA3)	Update a person's personal information without changing job information.

See Also

Chapter 13, "Updating Person and Job Information," Updating Personal Data, page 345

Chapter 4, "Adding a Person in PeopleSoft Human Resources," page 55

Changing Job Data

Use one of the three update components on the Workforce Administration menu to update a person's job data. These components are configured to simplify updating a person's record in different business situations. The following table describes each component and its navigational path:

Component	Pages in the Component	Usage
Job Data Workforce Administration, Job Information, Job Data	Work Location (JOB_DATA1) Job Information (JOB_DATA_JOBCODE) Job Labor (JOB_LABOR) Payroll (JOB_DATA2) Salary Plan (JOB_DATA_SALPLAN) Compensation (JOB_DATA3) Employment Information (EMPLOYMENT_DTA1) Job Earnings Distribution (JOB_DATA_ERNDIST) Benefit Program Participation (JOB_DATA_BENPRG)	Work with historical effective-dated rows of the person's job data (work with past, present, and future job data).
Current Job Workforce Administration, Job Information, Current Job	Work Location (JOB_DATA1) Job Information (JOB_DATA_JOBCODE) Job Labor (JOB_LABOR) Payroll (JOB_DATA2) Salary Plan (JOB_DATA_SALPLAN) Compensation (JOB_DATA3) Employment Information (EMPLOYMENT_DTA1) Job Earnings Distribution (JOB_DATA_ERNDIST) Benefit Program Participation (JOB_DATA_BENPRG)	Update only the person's *current* job record. Doing so improves processing time and system performance. You can add new current effective-dated rows to the job record, but you cannot see or add historical job records.
Pay Rate Change Workforce Administration, Job Information, Pay Rate Change	Employee Profile (PAY_RT_CHANGE1) Salary Plan (JOB_DATA_SALPLAN) Compensation (JOB_DATA3) Job Earnings Distribution (JOB_DATA_ERNDIST)	Change the person's compensation without changing job data.

Updating Compensation Packages Without Using an Update Component

If you update job record data without using one of the update components, for example when initially loading data or when using your own written processes, the system does not update the calculated fields on the job record. To update the calculated fields, run the Employee Compensation process. If you update job record data by using one of the update components or a component interface built on one of the update components, you do not need to run the Employee Compensation process because the update components run all PeopleCode that is run online (including updating calculated fields). Using the update components is the best way to update the job table because the system runs all business logic.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Compensation*, "Refreshing Worker Compensation Information".

See Also

Chapter 5, "Increasing the Workforce," page 77

Locating Personnel Records

The first time that you open an update page, the system displays a search page for you to select the person on whose records you want to work. If you do not know the person's ID, use the page to search for the correct record by name, partial last name, alternate character name, department, setID, or employment status. If you prefer, use the Search By National ID page to find a person's record by using a national ID.

Changing and Deleting IDs

This section provides an overview of ID modification and discusses how to:

- Modify IDs.
- Delete IDs.
- View the ID change and delete process log.

Understanding ID Modification

IDs are the means by which you identify employees, contingent workers, and people of interest throughout PeopleSoft Enterprise Human Resources. Maintaining a precise roster of IDs is critical to the accuracy of your data.

To help you keep accurate records, you can change or delete IDs. Though you rarely need to do this, it is necessary in cases where you entered an ID in error or where you no longer need an ID.

The ID modification process changes the ID in every record where PeopleSoft Enterprise Human Resources uses it, so keep in mind that modifications might affect other functions, such as payroll and benefits processing. Deleting an ID also deletes all security profiles associated with the ID; therefore, it is recommended that you delegate this responsibility to your system administrator.

See Also

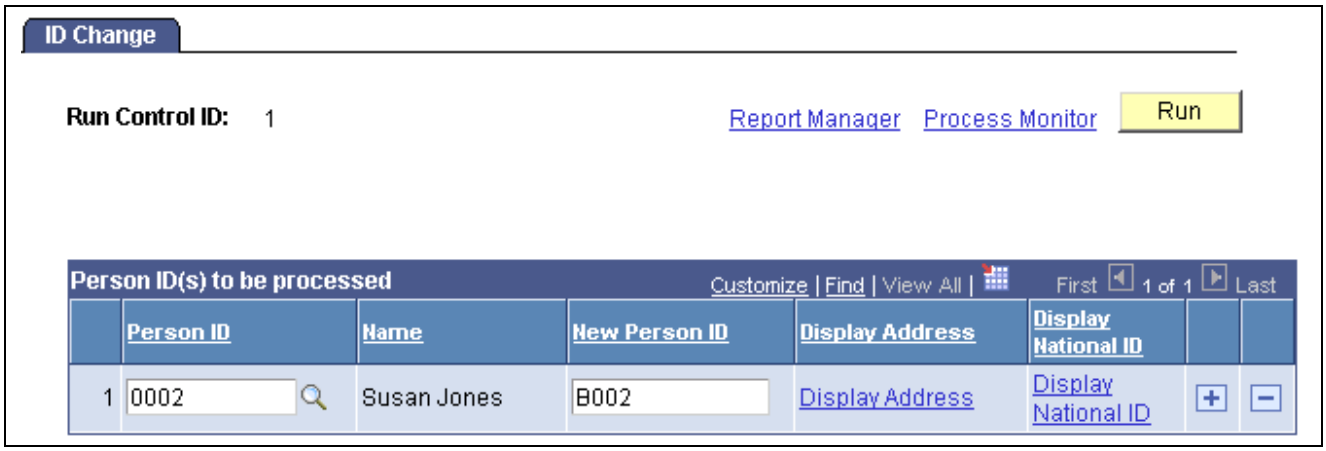
PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Pages Used to Change and Delete Employee IDs

Page Name	Object Name	Navigation	Usage
ID Change	RUNCTL_ID_CHANGE	• Set Up HRMS, System Administration, Database Processes, ID Change • Campus Community, Personal Information, ID Management, ID Change • Set Up SACR, System Administration, Database Processing, ID Change	Modify IDs.
ID Delete	RUNCTL_ID_CHANGÈ	• Set Up HRMS, System Administration, Database Processes, ID Delete • Campus Community, Personal Information, ID Management, ID Delete • Set Up SACR, System Administration, Database Processing, ID Delete	Remove IDs from the system. **Note.** If you've already run payroll with this ID included, you must manually delete payroll records, such as tax and deduction records.
ID Change/Delete Process Log	HR_PER502_LOG	• Set Up HRMS, System Administration, Database Processes, ID Change/Delete Process Log • Campus Community, Personal Information, ID Management, ID Change/Delete Process Log • Set Up SACR, System Administration, Database Processing, ID Change/Delete Process Log	Generate a log that lists which rows of data were affected when you changed or deleted an ID.

Modifying IDs

Access the ID Change page.

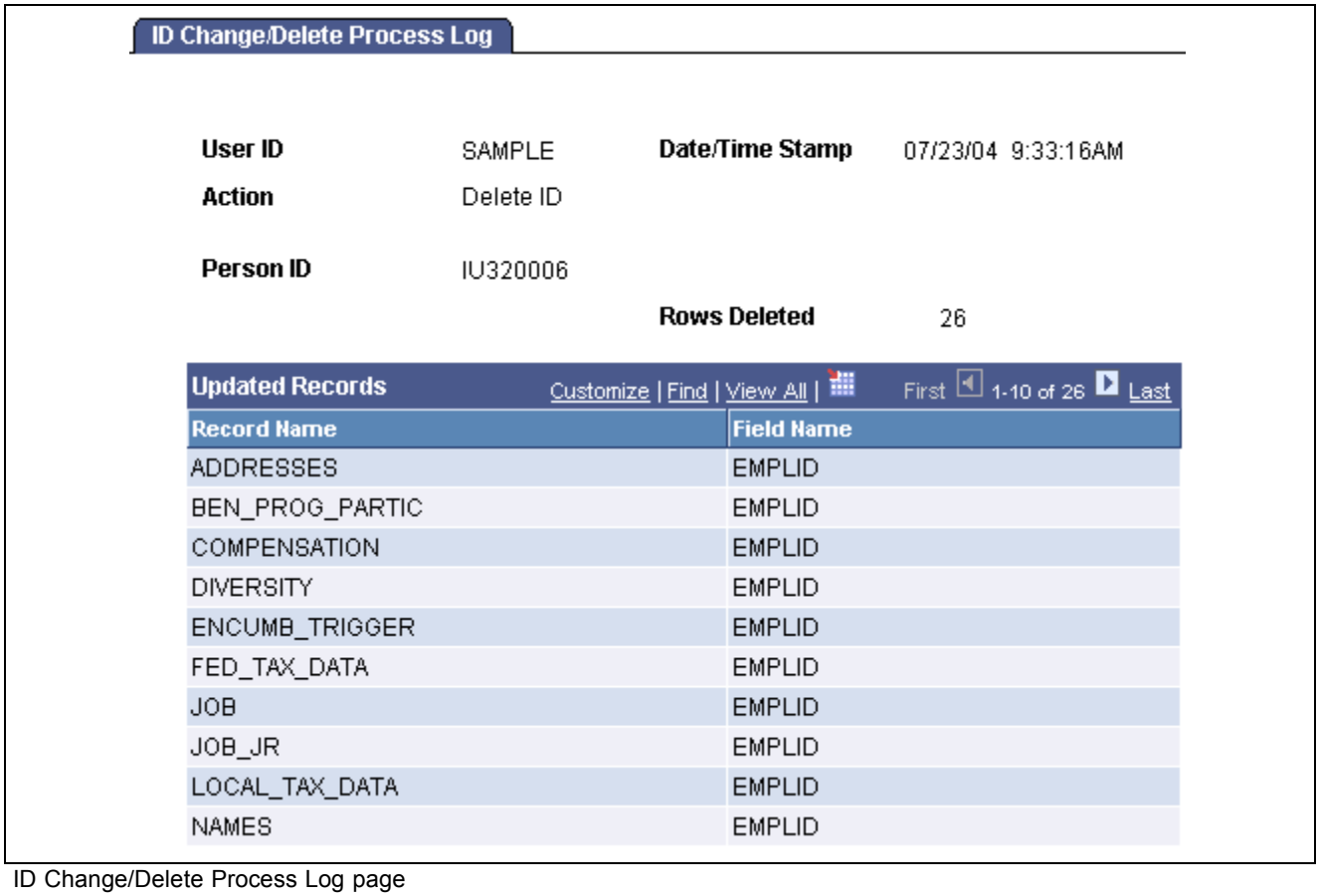


ID Change page

Select the current ID of the person that you want to process and enter the new ID. You can see display-only information on the person to whom the system or you assigned the original ID. Confirm that this is the correct person before you process the ID change.

Viewing the ID Change and Delete Process Log

Access the ID Change/Delete Process Log page.



ID Change/Delete Process Log page

This page lists the records and fields that the system modified when you changed or deleted the selected ID.

Updating Personal Data

Use the Modify a Person component to update a person's name, address, phone numbers, marital status, education, and other personal information.

This section provides an overview of types of personal data and discusses how to:

- Update effective-dated personal information.
- Use workflow to update person addresses.
- Update emergency contact information.
- Modify addresses.

See Also

Chapter 4, "Adding a Person in PeopleSoft Human Resources," page 55

Understanding Types of Personal Data

The Personal Data pages include two different types of personal data:

- Effective-dated data.

  Name, address, biographical (such as education, marital status, and language), checklist, and some regional fields are effective-dated. Enter current, historical, or future information in these fields. When new information takes effect, the system stores the old data so that you can track the changes that occur over time.

  Effective-dated biographical data is stored in the Personal Data History record (PERS_DATA_EFFDT). Name information is stored in the NAMES record with its own effective date. Address information is stored in the ADDRESSES record with its own effective date.

- Noneffective-dated data.

  Some personal data fields aren't linked to an effective date. In these fields, new entries overwrite and delete the previous entries. This situation means that you can store only current information. The system stores noneffective-dated data in the Personal Data record (PERSON).

Note. PeopleSoft Enterprise Human Resources also includes a workflow process for updating employee addresses.

Pages Used to Update Personal Data

Page Name	Object Name	Navigation	Usage
Biographical Details	PERSONAL_DATA1	• Workforce Administration, Personal Information, Modify a Person, Biographical Details • Workforce Administration, Personal Information, Biographical, Modify a Person, Biographical Details • Stock, Modify a Person, Biographical Details • Enterprise Learning, Modify a Person, Biographical Details • Benefits, Administer COBRA Benefits, Maintain COBRA Non-Employees, Modify Personal Information • Pension, Payments, Payee Pers/Job Data • Pension, Payments, Update Payee Personal Info	Update a person's personal information.

Page Name	Object Name	Navigation	Usage
Contact Information	PERSONAL_DATA2	• Workforce Administration, Personal Information, Modify a Person, Contact Information • Workforce Administration, Personal Information, Biographical, Modify a Person, Contact Information • Stock, Modify a Person, Contact Information • Enterprise Learning, Modify a Person, Contact Information • Benefits, Administer COBRA Benefits, Maintain COBRA Non-Employees, Modify Personal Information • Pension, Payments, Payee Pers/Job Data • Pension, Payments, Update Payee Personal Info	Update a person's name, address, phone, and email information.
Regional	PERSONAL_DATA3	• Workforce Administration, Personal Information, Modify a Person, Regional • Workforce Administration, Personal Information, Biographical, Modify a Person, Regional • Stock, Modify a Person, Regional • Enterprise Learning, Modify a Person, Regional • Pension, Payments, Payee Pers/Job Data • Pension, Payments, Update Payee Personal Info	Maintain regionally-required information about a person.

Updating Effective-Dated Personal Information

To update effective-dated information on the Personal Data pages:

1. Insert a new data row in the effective-dated group boxes.

   Each of these group boxes can use different effective dates. They are not related.
2. Enter the date when the new personal data that you're entering will take effect.

This date can be current or in the future.

3. Enter the new information.
4. Save the pages.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Understanding HRMS," Effective Dates

Using Workflow to Update Person Addresses

Keeping a person's personal information current can be time-consuming. With workflow, users who do not ordinarily have access to the PeopleSoft Enterprise Human Resources system can update their address data by using an email program such as Lotus Notes to send the information to your PeopleSoft Enterprise Human Resources system.

Updating Emergency Contact Information

The system updates a worker's emergency contact information automatically if you specify that the contact information is the same as the worker's contact information. When the emergency contact information is different from the worker's contact information, you must maintain the emergency contact information manually on the Contact Address/Phone page.

To activate the automatic emergency contact address update:

1. Access the Contact Address/Phone page.
2. Select the Same Address as Employee and Same Phone as Employee check boxes *before* you update the worker's address.
3. Select the type of address and type of phone number that is the same as the emergency contact.

   When you update the worker's address, the system automatically updates the emergency contact address. It also updates the Dependent/Beneficiary pages in the Benefits menu and the Payroll Data pages in the Employee Payroll Data menu.

   If the emergency contact address changes and is no longer the same as the worker's, clear the Same Address as Employee and the Same Phone as Employee check boxes. The system makes the address fields on the Contact Address/Phone page available, and you can enter a different address. After you clear the check box, the system no longer updates the emergency contact address automatically.

   Even if the emergency contact address is the same as the worker's, you can enter a different phone number.
4. Use the Other Phone Numbers page to record emergency contact phone numbers for the emergency contact in addition to the primary number that is recorded on the Contact Address/Phone page.

See Also

Chapter 7, "Entering Additional Data in Human Resources Records," Tracking Emergency Contacts, page 224

Modifying Addresses

To enter a new address for a worker:

1. Select Workforce Administration, Personal Information, Biographical, Modify a Person, Contact Information.

2. Insert a new data row in the Current Addressesregion.
3. Enter a new effective date for the new address information and click the Add Address link.
4. Enter the worker's new address information.

Updating Emergency Contact Address Information

The system also updates the Dependent/Beneficiary pages in the Benefits menu and the Payroll Data pages in the Maintain Payroll Data (USF) menu.

Running Personal Data Reports

This section lists the pages used to run personal data reports.

Pages Used to Run Personal Data Reports

Page Name	Object Name	Navigation	Usage
Employees Birthday	RUNCTL_PER002	Workforce Administration, Personal Information, Biographical, Birthdays Report	Run the Employee Birthdays report (PER002). This report lists employees and contingent workers, their birthdays, and other identifying information. **Note.** Run the Refresh Employees Table process before running this report.
Employee Home Address Listing	PRCSRUNCNTL	Workforce Administration, Personal Information, Biographical, Home Address Report	Run the Employee Home Address Listing report (PER020), which contains a complete listing of all employees and contingent workers, including addresses and home phone numbers.
Mailing Labels	PRCSRUNCNTL	Workforce Administration, Personal Information, Biographical, Mailing Labels Report	Run the Mailing Labels report (PER006), which produces a three-across set of mailing labels for all employees and contingent workers in your PeopleSoft Enterprise Human Resources database. **Note.** Run the Refresh Employees Table process before running this report.
(SGP) Parameters	RUNCTL_EMP_LIST	Workforce Administration, Job Information, Reports, Employee Listing SGP	Run the Employee Listing report (PER801SG). This report provides employee and contingent worker information based on the run control selections of department, employee name, or employee ID.

Updating Job Data

Use the Job Data component when you want to work with a person's historical job data. If you need to work with a person's current job only, use the Current Job component for faster system performance. You can work only with current and future job data on the Current Job pages.

Note. The Job Data and Current Job components are made up of the same pages as the Add Employment Instance, Add Contingent Worker Instance, and Add Person of Interest components.

If you are using position management, you will want to update most job data on the Position Data pages.

(USF) Update job information using the U.S. Federal pages.

See Chapter 5, "Increasing the Workforce," page 77.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions*, "Managing Position Data".

See Chapter 16, "(USF) Processing Personnel Action Requests," page 413.

This section provides overviews of updating effective-dated job data, security for updating job data, and personnel actions and human resources and payroll status, and discusses how to:

- Update effective-dated job data.
- Enter promotions.
- Enter departmental transfers.
- Enter pay rate changes.
- Track leaves of absence.
- Enter terminations and retirements.
- Enter deaths.
- Enter rehires.
- Assign workers to different positions.
- Pay workers on disability.

Understanding Updating Effective-Dated Job Data

You usually update job data by inserting new effective-dated data rows into an existing employee record. Effective dates enable you to keep a complete chronological history of all your data and tables—whether you changed them two years ago or want them to go into effect two months into the future. With this information, you can review historical data from a particular time to analyze position data or employee records. Or you can plan ahead and set up tables and data before they take effect.

The system also uses effective dates to compare pages and tables to ensure that the prompt tables that you see list only data that is valid as of the effective date of the current page. For example, if you create a new department code with an effective date of May 1, 2004 and enter a new data row (or update an existing row) on the Job Data pages that has an effective date *before* May 1, 2004, you won't see the new code as a valid choice when you select a department because the new code hasn't taken effect yet.

When you enter a new data row, the system copies the contents of the previous row into the new row—thus you do not have to retype any information that stays the same. (Ensure that you position the cursor on the data row that you want to copy before you insert the new row.) The only new information is the effective date, which is set by default to the system date (usually today's date).

Understanding Security for Updating Job Data

When you update a job record, keep in mind two special security issues.

Security and Effective-Dated Sequence Numbers

When you transfer people from one department to another by using a data row that contains an effective-dated sequence number, the system currently allows users with security access to the old or new department to have access to all the job data. The system is delivered this way because implementing security in system views that are specific to the function Max (effseq) on PS_JOB would slow down online response time.

For example, when you transfer an employee from department 1 to department 2 and give the employee a promotion on the same day, users with access to either department 1 or 2 have access to the employee's data because the transfer data row contains an effective-dated sequence number.

You can prevent this access by changing the security views for the PeopleSoft applications that you use. Keep in mind, however, that making the change affects system performance.

Security for Transfers Between Departments

PeopleSoft Enterprise Human Resources enables users to assign people to departments that they cannot access for updates. If you want to prevent a user from transferring a person into a department for which the person does not have access, use the PeopleSoft Enterprise Human Resources DEPT_TBL_ACCESS view, which shows only those department IDs that a user can access based on the security permission lists to which they belong.

Note. If you choose to use this view, you must create a permission list for users who have access to all departments so that they can perform transfers.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Working with System Data Regulation in HRMS"

Understanding Personnel Actions and Human Resources and Payroll Status

When you select an action to change a person's job data, the system may change the person's HR or payroll, or job status. For example, when you select *Retired,* the system changes the HR status from *Active* to *Inactive.*

HR status indicates whether the person is still active in the human resources system. The Payroll Status field (for employees) indicates the payroll status or job status of the person. A person can have an active HR record but not be currently receiving pay (employee) or holding a job (contingent worker). Conversely, a person could have an inactive job record but continue to receive pay. For example, if you select retirement with pay, the system changes the HR status to *Inactive* and changes the payroll status from *Active* to *Retired with Pay.* The two status fields enable you to accurately identify the different types of people in your organization.

The statuses are based on either the personnel action or, in a few cases, the *reason* for the action, such as death. A change in HR status or payroll status can affect PeopleSoft Enterprise Human Resources Manage Base Benefits, PeopleSoft Enterprise Benefits Administration, PeopleSoft Enterprise Payroll processing, and PeopleSoft Enterprise Pension Administration. For example, a promotion or a job reclassification might affect an employee's benefit coverage, or you might need to suspend benefit coverage during a leave of absence or a suspension.

This table explains how the system sets status:

Personnel Action	HR Status	Payroll Status	Payroll Processing for PeopleSoft Enterprise Payroll for North America and the Payroll Interface
Hire Add contingent worker Add person of interest Rehire (employees only) Return from leave Return from disability Additional job Recall from suspension or layoff Assignment	*Active*	*Active*	Yes
Leave of absence Short-term disability Long-term disability	*Active*	*Leave of Absence*	No
Paid leave of absence Short-term disability with pay Long-term disability with pay	*Active*	*Leave with Pay*	Yes
Retirement with pay (employees only)	*Inactive*	*Retired with Pay*	Yes
Terminated with benefits Terminated with pay	*Inactive*	*Terminated with Pay*	Yes
Layoff Suspension Temporary assignment	*Active*	*Suspended*	No
Retirement	*Active*	*Retired*	No

Personnel Action	HR Status	Payroll Status	Payroll Processing for PeopleSoft Enterprise Payroll for North America and the Payroll Interface
Assignment completion Completion (contingent workers only) Termination	*Inactive*	*Terminated*	No
Pay rate change Demotion Data change Earnings distribution change Job reclassification Position change Probation Completion of probation Promotion Transfer	The same status that's in the previous data row. If no previous data row exists, the system sets the status to *Active.*	The same status that's in the previous data row. If no previous data row exists, the system sets the status to *Active.*	Varies

Note. If your organization uses PeopleSoft Enterprise Payroll for North America, the system does not generate payroll paysheets for workers whose status is *Retired* or *Terminated.* If you need to pay workers for a partial pay period or for a time after they leave the company, select the personnel action *Retired with Pay* or *Terminated with Pay.*

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Maintaining Payroll Data"

Pages Used to Update Job Data and Salary Data

Page Name	Object Name	Navigation	Usage
Work Location	JOB_DATA1	• Workforce Administration, Job Information, Job Data, Work Location • Workforce Administration, Job Information, Current Job, Work Location	Update position and location information for a person's job.

Page Name	Object Name	Navigation	Usage
Job Information	JOB_DATA_JOBCODE	• Workforce Administration, Job Information, Job Data, Job Information • Workforce Administration, Job Information, Current Job, Job Information	Update information about a person's job.
Job Labor	JOB_LABOR	• Workforce Administration, Job Information, Job Data, Job Labor • Workforce Administration, Job Information, Current Job, Job Labor	Update national labor agreement data.
Payroll	JOB_DATA2	• Workforce Administration, Job Information, Job Data, Payroll • Workforce Administration, Job Information, Current Job, Payroll	Update payroll processing data.
Salary Plan	JOB_DATA_SALPLAN	• Workforce Administration, Job Information, Job Data, Salary Plan • Workforce Administration, Job Information, Current Job, Salary Plan	Update a person's salary plan information.
Compensation	JOB_DATA3	• Workforce Administration, Job Information, Job Data, Compensation • Workforce Administration, Job Information, Current Job, Compensation	Update a person's compensation information.
Employment Information	EMPLOYMENT_DTA1	Click the Employment Data link at the bottom of any page in the Job Data or Current Job Data component. • Workforce Administration, Job Information, Job Data • Workforce Administration, Job Information, Current Job	Update optional employment information.

Page Name	Object Name	Navigation	Usage
Job Earnings Distribution	JOB_DATA_ERNDIST	Click the Earnings Distribution link at the bottom of any page in the Job Data or Current Job Data components. • Workforce Administration, Job Information, Job Data • Workforce Administration, Job Information, Current Job	Update a person's compensation information.
Benefit Program Participation	JOB_DATA_BENPRG	Click the Benefit Program Participation link at the bottom of any page in the Job Data or Current Job Data components. • Workforce Administration, Job Information, Job Data • Workforce Administration, Job Information, Current Job	Update a person's benefit enrollment information.

Updating Effective-Dated Job Data

Access the Work Location page.

To update effective-dated job data:

1. Locate the person whose record you want to change.

   Always start on the Work Location page because that's where the Effective Date field is. From there, you may have to go to other pages to enter more information about the personnel action that you're taking.
2. Insert a new data row.
3. In the Effective Date field, enter the date when the new action will take effect.
4. Select an action code for the change, such as *Transfer* or *Promotion.*
5. If applicable, enter a reason code to explain why this action is occurring.
6. Change any other data needed to complete the new action, either on this page or on other pages in the component.

   For example, when you promote an employee, you most likely enter a new job code or a new position number on the Work Location page. You might also select a new salary administration plan, grade, and step, enter a new compensation rate on the Compensation page, and enter a new business title and work phone on the Employment Information page.
7. Save the pages.

Entering Multiple Actions with the Same Effective Date

On occasion, you may need to enter more than one action that takes effect on the same day. Entering two actions with the same effective date is especially common when you are tracking compound percentage pay increases that take effect at the same time. Use effective sequence numbers to combine multiple actions and specify which one to process first.

For example, a promotion (which produces a percentage pay increase) and a merit increase may take effect on the same day.

To enter multiple personnel actions with the same effective date:

1. Access the Work Location page for the person whose data you're updating.
2. Insert a new data row for the first action.

   The effective date is set by default to the system date, usually today's date, which you can override if necessary. Leave the effective sequence number set at *0*.
3. Enter any other information that you need to complete the action, either here or in other pages in the same component.
4. To enter the second action, return to the Work Location page and insert another data row.
5. Enter the same effective date as the first action, but enter an effective date sequence number of *1*.
6. Select the appropriate personnel action and enter any other information required to implement the action, either here or on other pages.

Entering Promotions

A promotion usually involves a change of salary grade and new job code. This table lists the pages and fields that you typically update when you enter a promotion (you may need to update additional pages and fields):

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action Code: *Promotion* Reason Code (if applicable) Position Number	All the entries on the page could change when you enter a promotion, depending on the data for the former job and the new job. If you're organizing part or all of PeopleSoft Enterprise Human Resources by position, review *PeopleSoft Human Resources PeopleBook: Manage Positions.*
Job Information	Job Code Regular/Temporary Full/Part Standard Hours Work Period FTE Shift Shift Rate Contract Number Local country fields	All the entries on the page could change when you enter a promotion, depending on the data for the former job and the new job. If you're organizing part or all of PeopleSoft Enterprise Human Resources by position, review *PeopleSoft Human Resources PeopleBook: Manage Positions.*

Affected Pages	Affected Fields	Comments
Salary Plan Compensation	Salary Administration Plan/Grade/Step Compensation Rate	Update Salary Plan/Grade/Step on the Salary Plan page. Also update compensation information on the Compensation page.
Employment Information	Business Title Work Phone	Update these fields as needed.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Compensation, "Refreshing Worker Compensation Information," Changing a Compensation Package

Entering Departmental Transfers

Enter a transfer action when you want to assign a person to a new department without changing the person's job code. A transfer also implies that the worker's salary grade and compensation remain the same.

If you're organizing part or all of PeopleSoft Enterprise Human Resources by position, use the transfer action to move a worker from one position to another. To move the position *and* the incumbent to a new location or department, use the Position Data pages.

This table lists the pages and fields that you typically update when you enter a transfer (you may need to update additional pages and fields):

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action Code: *Transfer* Reason Code (if applicable) Department	The system automatically enters a new location if it finds matching location setIDs in the Department table and the Tableset Record Group Control for the business unit that you're using.
Employment Information	Business Title Work Phone	Update these fields as needed.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions, "Managing Position Data"

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Working with System Data Regulation in HRMS"

Entering Pay Rate Changes

This table lists the pages and fields that you typically change when you enter a pay rate change. You may need to update additional pages and fields, as well.

Note. If you do not need to modify any job-related information, you can use the Pay Rate Change component.

See Chapter 13, "Updating Person and Job Information," Updating Salary Information, page 366.

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action Code: *Pay Rt Chg* (pay rate change) Reason Code (if applicable)	Enter *Pay Rate Change* to enter a salary change that isn't related to a change in salary grade or job code. If the pay rate change results from a salary grade or job code change, enter the change as a promotion or some other action.
Salary Plan	Salary Administration Plan/Grade/Step	Enter a new salary step if the pay rate change involves a change in step. You cannot select a new grade because if the pay rate resulted from a change in salary grade, you enter the rate change as part of a promotion or other action. If you selected the Multi-Step/Grade check box on the Installation Table page and you enter a new step on this page, click the Default Pay Components button on the Compensation page if you want the system to supply default values for that step. Doing so is necessary unless you have distributed the worker's earnings by amount on the Job Earnings Distribution page. For job earnings distributions, manually update the distribution for the new rate.

Affected Pages	Affected Fields	Comments
Compensation	All fields	To enter a new pay rate, enter a new compensation rate, rate change amount, or rate change percent. When you enter any one of these three amounts, the system automatically calculates the other two. Based on the compensation rate and frequency, the system calculates and displays the hourly rate, daily rate, monthly rate, and annual rate for this worker. If you selected the Multi-currency check box on the Installation Table page and entered the compensation rate in a different currency from your base currency, the system converts the rates to the base currency and compares them with the ranges specified for this salary grade in the Salary Grade table. If the rates exceed the salary range, a warning message appears. If necessary, enter a new annual benefits base rate for calculating this employee's benefits. The system calculates the compa-Ratio (or percent through range calculation) based on the salary plan and grade and in the base currency that your organization uses, which you specify on the Installation Table page. The system also calculates the percent through range. This figure determines where a worker falls in the range by taking the salary minus the minimum divided by the spread. For example, if an employee has a salary of 26,000 USD in a range of 25-30,000 USD for the salary grade, the percent through range is 20 percent.

Affected Pages	Affected Fields	Comments
Compensation (continued)		Modify any other information that has changed because of the pay rate change, such as holiday schedule, pay group, employee type, standard hours, or work period on the Job Data, Payroll, or Job Information pages.
Job Earnings Distribution		Update as needed to distribute the worker's compensation hours or earnings.

Tracking Leaves of Absence

Many workers take a leave of absence at some point in their careers. Leaves can occur for any number of reasons, including sickness, vacation, maternity or paternity leave, jury duty, suspensions, or unpaid leave.

If your company tracks workers' absence history, you can acknowledge a leave of absence in the Monitoring Absences pages and Job Data pages.

This table lists the pages and fields that you typically change when you enter a leave of absence (you may need to update additional pages and fields, as well):

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action: *Leave of Absence, Leave of Absence with Pay,* or *Paid Leave of Absence* Reason Code (if applicable)	None
Employment Information	Expected Return Date	Enter the date when you expect the worker to start work again. When you save the pages, the system displays the day before the leave of absence date as the date last worked. You can change it if necessary. When the worker returns from leave, the system clears this field.

Tracking Multiple Types of Leave for One Worker

You might encounter situations in which you need to enter multiple types of leave for the same worker. For example, an employee might take a six-week leave with disability pay, take the following two weeks with vacation pay, and then take an additional month without pay.

You can enter all these leave types at the same time by inserting a new data row in the Work Location page for each type of leave and entering the effective date when each leave type begins. Then you access the appropriate page to make any other changes pertaining to that leave, such as compensation changes.

Entering Returns from Leave

Most workers eventually come back from leaves of absence and resume their job duties. In fact, you often know at the time workers begin their leaves when they plan to return to work. Enter the return from leave information at the same time that you enter the leave of absence, or as soon as you have a confirmed return date.

This table lists the pages and fields that you typically change when you enter a return from leave (you may need to update additional pages and fields, as well):

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action: *Return from Leave* Reason Code (if applicable)	None
Employment Information	Expected Return Date	When you save the pages, the system clears this field.

Entering Terminations and Retirements

When a worker retires or leaves your organization for some other reason, you enter the termination into the person's record.

This table lists the pages and fields that you typically change when you enter a termination or retirement (you may need to update additional pages and fields, as well):

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action: *Terminated, Terminated with Pay, Terminated with Benefits, Retirement,* or *Retirement with Pay* Reason Code, if applicable	The system treats the effective date that you enter as the day the termination starts and the first day the worker is no longer paid. For example, if the worker's last day of employment is June 1, set the effective date of termination or retirement as June 2 because that's when the termination begins. If you set it as June 1, the worker isn't paid for the last day of work.
Employment Information	Termination Date	The system displays the day *before* the effective date as the termination date and last date worked. If you rehire the worker, the system clears both these fields. When a worker returns from leave, the system clears only the Date Last Worked field.

Entering Deaths

This table lists the pages and fields that you typically change when you enter a termination due to death:

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action: *Terminated* Reason Code: *Death*	The system treats the effective date that you enter as the day the termination starts and the first day that the worker is no longer paid.
Identity/Diversity	Date of Death	Record the date that the worker died.
Employment Information		The system displays the termination effective date as the termination date, and the day before the termination date as the date last worked. The system uses these dates and the effective date in payroll processing and reporting.

Entering Rehires

You may want to rehire a person who worked for your company in the past. Information on a rehired worker is probably already in PeopleSoft Enterprise Human Resources, unless the worker data was deleted or archived. Before you rehire workers, you may want to make sure that the personal, employment, and job data is current. If a rehired worker doesn't have a record in the system, do not use the update pages. Instead, add a new employment or contingent worker instance.

See Chapter 5, "Increasing the Workforce," page 77.

See Chapter 2, "Setting Up the Administer Workforce Business Process," page 5.

Because you probably rehire a worker whose previous job was in a department (organizational entity) for which you do not have security access, it's helpful to provide security access to all departments to at least one user performing rehires.

This table lists the pages and fields that you typically change when you enter a rehire (you may need to update additional pages and fields):

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action: *Rehire* Reason Code, if applicable	You can rehire only workers whose payroll or job status is *Terminated, Terminated with Pay, Retired,* or *Retired with Pay.*
Employment Information	Company Seniority Date Service Date Rehire Date Service Months Service Days	You may want to change the company seniority date and service date. The company seniority date can serve as the basis for the worker's seniority, or you can use it for other tracking and reporting purposes. The service date is the date on which the worker's service ranking is based and is used primarily for benefit-related matters. When you save the pages, the system automatically completes the rehire date and recalculates the service months and days.

See Also

Chapter 5, "Increasing the Workforce," page 77

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Assigning Workers to Different Positions

If you're organizing part or all of PeopleSoft Enterprise Human Resources by position, you often move workers from one position to another as a result of promotions, transfers, rehires, or other personnel actions. Because both position and worker data are already in the system, you connect the two by selecting a position number, entering the effective date of the assignment, and entering any exceptions to the default data.

The following table lists the pages and fields that you typically change in the Job Data component when you enter a change of position. You may need to update additional pages and fields. When you change an assignment, the system also updates the Position Data - Work Location page. It automatically calculates and displays the new head count and shows the appropriate indicator in the Open/Filled field.

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action: *Position Change, Transfer, Promotion,* or *Rehire* Reason Code, if applicable Position Number	After you enter a position number, the system automatically completes position-related fields, including job code, department, and location. The system enters the position entry date as the effective date of the position change action. You cannot change the position entry date. To change the entry date, you must change the effective date for the position change action. To override the position defaults, select the Position Data Override check box, which makes the previously unavailable fields available for entry, such as Job Code and Department. You can then enter exceptions in these fields. The Position Management Record check box is display-only. The system uses this check box to indicate that it has automatically inserted a data row on the Job Data pages due to changes that you made to fields on the Position Data pages. **Note.** If you override the defaults, you must maintain the job data manually—the system does not update position data automatically again until you clear the Position Data Override check box. The system issues a warning message if you assign a worker to a position that has already been filled by another worker and if a new appointment exceeds the maximum head count for that position.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions, "Managing Position Data"

Paying Workers on Disability

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

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

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

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

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

Updating Salary Information

The Pay Rate Change component provides a quick and simple option for making salary adjustments when the adjustment is not related to any other changes such as promotions or transfers. If any other job-related information needs to be modified for the salary change, use the Job Data component.

Note. The four pages in the Pay Rate Change component—Employee Profile, Salary Plan, Compensation, and Job Earnings Distribution—match related pages in the Job Data component (the Employee Profile page contains information from both the Work Location page and the Job Information page).

See Also

Chapter 13, "Updating Person and Job Information," Updating Job Data, page 350

Chapter 5, "Increasing the Workforce," page 77

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting, "Administering Salary Plans, Grades, and Steps"

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting, "Reviewing Worker Performance History"

Pages Used to Update Salary Information

Page Name	Object Name	Navigation	Usage
Employee Profile	PAY_RT_CHANGE1	Administer Workforce, Job Information, Pay Rate Change, Employee Profile	Adjust the work periods and hours if it is necessary to do so for the pay rate change.
Salary Plan	PAY_RT_CHG_SALPLAN	Administer Workforce, Job Information, Pay Rate Change, Salary Plan	Adjust the salary step.
Compensation	PAY_RT_CHANGE2	Administer Workforce, Job Information, Pay Rate Change, Compensation	Adjust rates and frequencies.
Job Earnings Distribution	PAY_RT_CHANGE3	Administer Workforce, Job Information, Pay Rate Change, Job Earnings Distribution	Adjust earnings distributions.

Refreshing Compensation

When you run the Employee Compensation Application Engine process (HR_PER501A) or click the Default Pay Components button on the Compensation page, the same steps are executed, but you can update several records at once with the HR_PER501A process.

The Employee Compensation process:

- Inserts a new job row when you select Add new effective date, and uses the effective date that you entered in the As Of Date field

  Alternatively, it updates the job row that is effective as of the date that you select in the As Of Date field.
- Updates any future rows (rows are considered future if they come into effect after the as of date) when you select Update Future Rows.
- Replaces manual changes with the new default values.

Page Used to Refresh Compensation

Page Name	Object Name	Navigation	Usage
Employee Compensation page	RUNCTL_PER501	Workforce Administration, Job Information, Calculate Compensation, Employee Compensation	Use to run the Employee Compensation process to update compensation packages.

Running Job Data Reports

This section provides an overview of reporting appointments for job data changes, lists a common element, and discusses how to:

- (JPN) Run the Appointment Notification report.
- (JPN) Run the Appointment List report.
- (JPN) Run the Employee Assignment List report.

See Also

Chapter 15, "(USF) Administering Personnel Action Requests," page 393

(JPN) Understanding Reporting Appointments for Job Data Changes

When workers are newly hired or transferred, or have other job-related changes, many Japanese companies provide individual notifications of appointment to each worker. These notifications, known as appointment notifications *(Jirei),* contain different information depending on the action and action reason entered on the worker's new job record.

Periodically, many companies also distribute a listing of all new hires or transfers or other changes of job. This list is known as the appointment list *(Tsuutatsu)*.

When you run the Appointment Notification report, the report headings change according to the actions for which you are running the report—you can select actions and action reasons on the report page.

Reporting Appointments for Actions and Report Outputs

The following table illustrates what the appointment reports contain, depending on the action for which you run the report:

Heading and Actions	Hire and Rehire	Transfer	Promotion	Termination
Announcement date	3	3	3	3
Company description (of worker's company)	3	3		3
Department	3	3		3
Supervisor level	3	3		3
Employee status	3			
Salary plan			3	
Salary grade			3	

Note. For the actions *Transfer* and *Promotion,* the system automatically populates the Reason field. For a promotion, the system populates the field with *Grade Advance.* For a transfer, the system populates the field with *Employee Request* and *Internal Recruitment.* For all other actions in the table, you can select individual reasons (for the action that you selected) or have the system select all reasons (for the action that you selected).

With the Japanese appointment reporting functionality, if you are recording a worker's simultaneous change of department and supervisor level, enter the department change first. With both changes having the same effective date, the change of supervisor level has the higher sequence number and ensures that the system selects the changes for reporting on both the appointment notification and appointment list.

In addition, when you record job data changes with the Japanese appointment reporting functionality, reports are available for the following actions:

- Hire
- Rehire
- Termination
- Transfer
- Promotion

Sorting Appointment Lists Using Tree Structures and Definitions

To have the system sort appointment lists by department and supervisor level, use the standard tree building features to create a tree structure and reporting definition for supervisor levels, and a reporting definition for departments. You then need to select only the Refer to the Tree Manager check box on the report page to have the system use your DEPT_SECURITY tree and, depending on the job action and reason to which the appointment information relates, your SUPERVISOR_LEVEL tree.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Common Element Used in This Section

Show Components Select if you want your report to display compensation component information.

Pages Used to Run Job Data Reports

Page Name	Object Name	Navigation	Usage
Personnel Actions History	RUNCTL_PER015	Workforce Administration, Job Information, Reports, Personnel Actions History	Run the Personnel Actions History report (PER015), which lists all workers affected by each of the job actions that you enter.
Pending Future Actions	RUNCTL_ASOFDT_COMP	Workforce Administration, Workforce Reports, Pending Future Actions	Run the Pending Future Actions report (PER021), which lists all workers with job action notices scheduled for a future date.

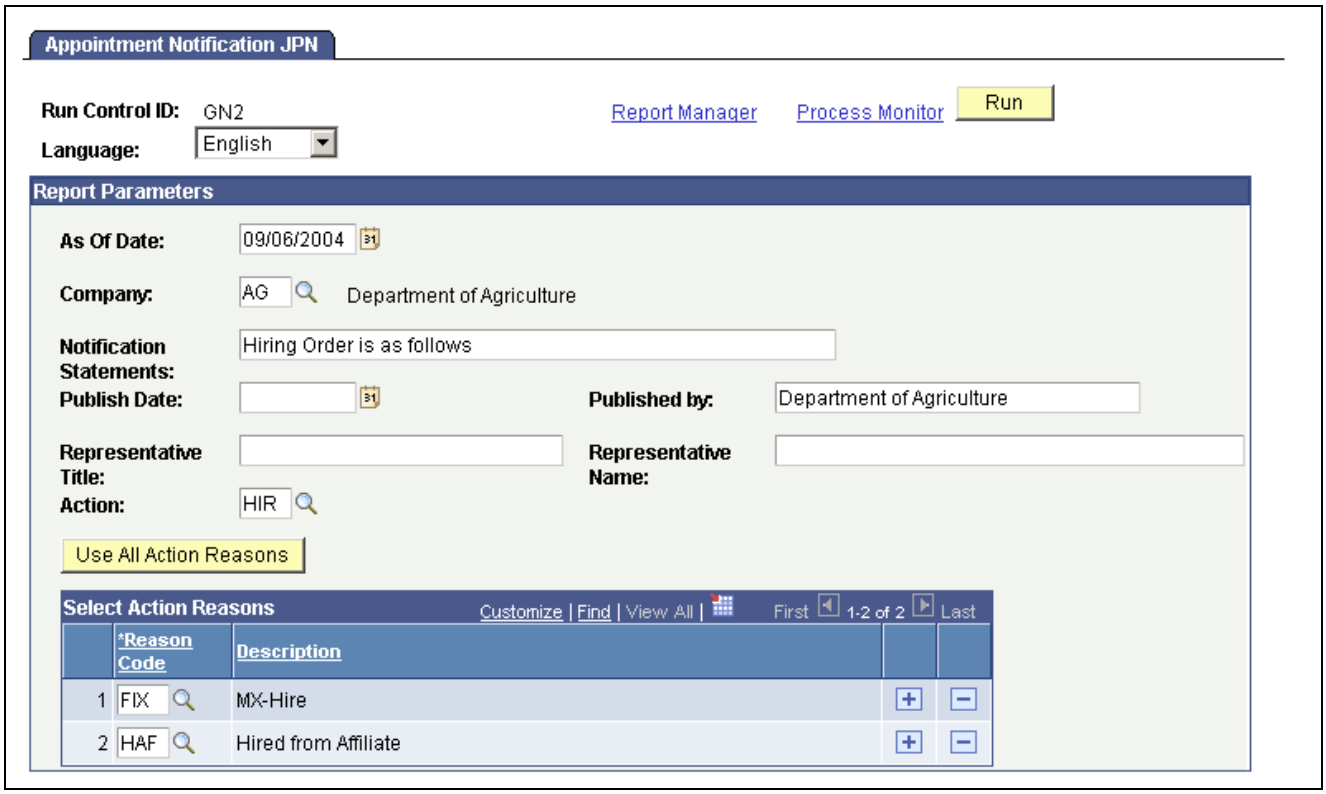
Page Name	Object Name	Navigation	Usage
Department Action Notices	PRCSRUNCNTL	Workforce Administration, Workforce Reports, Department Action Notices	Run the Department Action Notices report (PER001). This report lists action notices that are tied to a time period or expiration date. Use it as a reminder of selected personnel action notices. **Note.** Run the Refresh Employees Table process before running this report.
Employees on Leaves of Absence	PRCSRUNCNTL	Workforce Administration, Job Information, Reports, Employees on Leave of Absence	Run the Employees on Leave of Absence report (PER005). This report lists all workers on leave and their expected return dates. Use this report to compare the return date that you entered in PeopleSoft Enterprise Human Resources with the worker's expected return date, or as a reminder to enter the return from leave information. **Note.** Run the Refresh Employees Table process before running this report.
Temporary Employees	RUNCTL_ASOFDATE	Workforce Administration, Job Information, Reports, Temporary Employees	Run the Temporary Employees report (PER007). This report provides an alphabetical list of all workers marked as temporary, along with length of service and other details of employment.
Years of Service	RUNCTL_PER003	Workforce Administration, Job Information, Reports, Years of Service	Run the Years of Service report (PER003). This report lists workers who have completed the number of years of service that you specify, as of the point in time that you specify. Use this report as a reminder of workers who are eligible for vested benefits plans or service recognition awards.

Page Name	Object Name	Navigation	Usage
Primary Job Audit	RUNCTL_PER058	Workforce Administration, Workforce Reports, Primary Job Audit	Run the Primary Job Audit report (PER058). Use this report to check for discrepancies in the primary job designation for workers with multiple jobs. Run this report regularly to correct discrepancies in worker job records.
Employee Turnover Analysis	RUNCTL_FROMTHRU	Workforce Administration, Workforce Reports, Employee Turnover Analysis	Run the Employee Turnover Analysis report (PER010). This report lists each department ID and provides the worker counts as of the date that you specify.
Official List	RUNCTL_PER054_ESP	Workforce Administration, Workforce Reports, Official List ESP	Run the Spanish Official List report (PER054ES), which compiles the information that you need for Matricula book reporting. You can run the report for all matricula books, which includes historical worker data, or for the current book only, which includes only current data.
Appointment Notification JPN	RUNCTL_NTF_JPN	Workforce Administration, Job Information, Reports, Appointment Notification JPN	Run the JPN Appointment Notifications report (PER063JP). Depending on the combination of action and reason that you use in the run control, this report prints individual worker notifications of hire, rehire, termination, transfer, and promotion.
Appointment List JPN	RUNCTL_NTF2_JPN	Workforce Administration, Job Information, Reports, Appointment List JPN	Run the Appointment List JPN report (PER064JP), which generates an appointment list. This report lists all workers who have been hired, rehired or retired, transferred or promoted. The information that the report provides varies according to the combination of action and reason that you enter on the Appointment List report page.

Page Name	Object Name	Navigation	Usage
JPN Employee Assignment List	RUNCTL_EMPLIST_JPN	Workforce Administration, Job Information, Reports, Employee Assignment List JPN	Print the JPN Employee Assignment List report (PER066JP), which lists workers by department, including additional appointment employees.

(JPN) Running the Appointment Notification Report

Access the Appointment Notification JPN page.



Appointment Notification JPN page

Report headings vary according to the combination of action and reason. Enter free-form text and a company official's title and name to appear on the report, and select the action and reason combinations on which you want to report.

Language Select the language for the report.

As of Date This is the effective date of worker job data rows that the system searches and report on. It appears on the report as the announcement date.

Note. For termination notifications, enter the effective date of the termination row on the worker's job record. The system sets the announcement date on the printed notification as the As of Date minus 1 day, the same as the termination date on the worker's Employment Dates page.

Company Select your company code. The company description appears by default in the Published by field.

Notification Statements Enter any comments that you want to appear as an introduction to the list on the report: for example, *Hiring order is as follows.*

Publish Date Enter the publish date. This date, which appears on the report, is the date that your organization wants as the official publication date of the appointment notification.

Published by Displays the description of the company that you entered, but you can override the default with a free-form description of, for example, your human resources department.

Representative Title Displays the default from the company table. You can override the default. This is the title of the company's representative that appears on the notification.

Representative Name Displays the default from the company table. You can override the default. This is the name of the company's representative that appears on the notification.

Action Select an action that you want to report on. You can only select *Hire, Rehire, Transfer, Promotion,* or *Termination.*

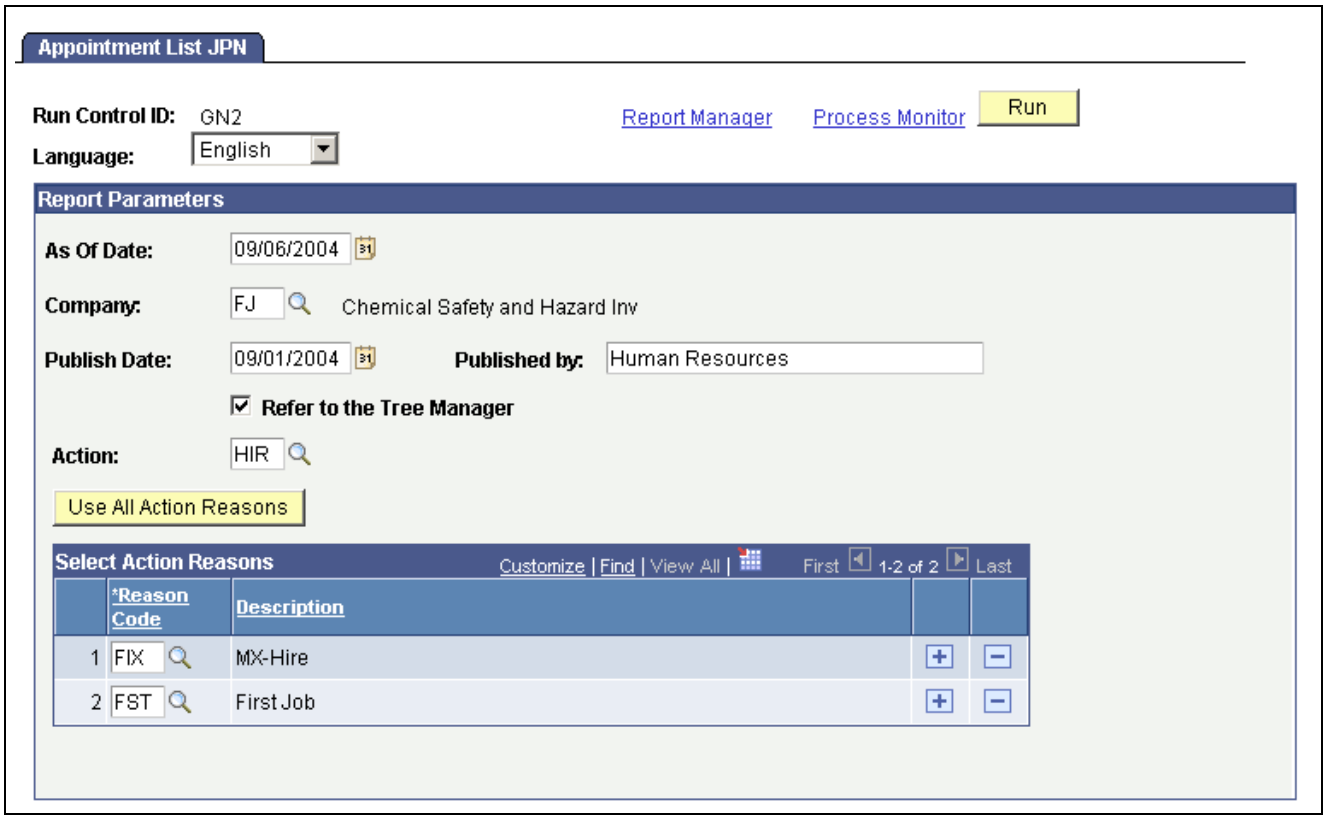
Use All Action Reasons Click this button unless you want to select individual reasons for the action that you entered in the Reason Code grid. Even if you selected individual reasons in the grid, if you click this button, the system loads all reasons.

Note. You only need to select reasons (individual or all) for actions *Hire, Rehire,* and *Termination.* For actions *Transfer* and *Promotion,* the system automatically populates the Reason Code field. However, the process reports only job rows that have a reason code. If a job row has an action of *Hire, Rehire, Termination, Transfer,* or *Promotion,* but no action reason, the system does not report it.

Reason Code Select all the reasons for the action that you entered that you want the report to include. If the Use All Action Reasons check box is cleared, you must enter at least one reason in this field. The system displays the description of each reason that you select. See the previous note that discusses the Use All Action Reasons field.

(JPN) Running the Appointment List Report

Access the Appointment List JPN page.



Appointment List JPN page

You can enter free-form text and a company official's title and name to appear on the report, and you can select the action and reason combinations that you want to report on.

As Of Date This is the effective date of worker job data rows on which the system will search and report.

Note. For *Termination* listings, you should enter the effective date of the job termination row. The system sets the announcement date on the printed list as the As Of Date minus 1 day, the same as the termination date on the worker's Employment Dates page.

Company Select your company code. Unlike for appointment notification, the company description does *not* appear by default in the Published by field.

Publish Date Enter a publish date. This date, which appears on the report, is the date that your organization wants as the official publication date of the appointment list.

Published by Enter a free-form description of the publishing department, such as your human resources department.

Action Select an action that you want to report on. You can only select *Hire, Rehire, Transfer, Promotion,* or *Termination.*

Refer to the Tree Manager Select this check box if you want the system to sort the listing by using the DEPT_SECURITY tree and, depending on the action and reasons, the SUPERVISOR_LEVEL tree.

This is how the system sorts the listing when you select this check box:

- For actions *Hire* and *Rehire,* the system uses only the DEPT_SECURITY tree.
- For actions *Transfer* and *Termination,* the system uses both the DEPT_SECURITY tree and the SUPERVISOR_LEVEL tree.
- For action *Promotion,* the system sorts by salary plan, salary grade, and employee ID, whether the check box is selected or cleared.

  Trees have no effect.

If the Refer to the Tree Manager option is cleared, the system sorts the list by employee ID.

Note. Workers who do not have a supervisor level appear in the list by department, with the Supervisor Level column blank. They are sorted by employee ID, after all the workers who do have a supervisor level.

Use All Action Reasons Click this button unless you want to select individual reasons for the action that you entered in the Reason Code grid. Even if you have selected individual reasons in the grid, if you click this button, the system loads all reasons.

Note. You need to select reasons only for actions *Hire, Rehire,* and *Termination.* For actions *Transfer* and *Promotion,* the system automatically populates the Reason Code field. However, the process reports only job rows that have an action reason. If a job row has an action of *Transfer* or *Promotion,* but no action reason, the system does not report it.

Reason Code Select all the reasons for the action that you entered that you want the report to include. If you click the Use All Action Reasons button, you must enter at least one reason in this field. The system displays the description of each reason that you select. See the note above for the Use All Action Reasons field.

(JPN) Running the Employee Assignment List Report

Access the JPN Employee Assignment List page.

JPN Employee Assignment List run control page

This report lists workers by department and supervisor level, including workers with additional appointments.

To run the report, at least one department tree must be created. For the purposes of department security, the DEPT_SECURITY tree usually already exists. You can either select this tree or create a new department hierarchy beneath the DEPARTMENT tree structure.

The report is sorted by department, and then by workers:

- With supervisor levels registered in the Supervisor Level tree, in tree order.
- With supervisor levels not registered in the Supervisor Level tree, in alphanumeric supervisor level order.
- Without supervisor levels, in alphanumeric employee ID order.

Note. The Supervisor Level tree that the system uses for sorting is the one used for the Appointment Notification and Appointment List reports. It must be named SUPERVISOR_LEVEL. If you have not defined a Supervisor Level tree with that name, sorting is in alphanumeric supervisor level order.

Viewing a Summary of All Job Records

This section lists the page used to view a summary of all jobs records held by a person.

Page Used to View a Summary of All Job Records

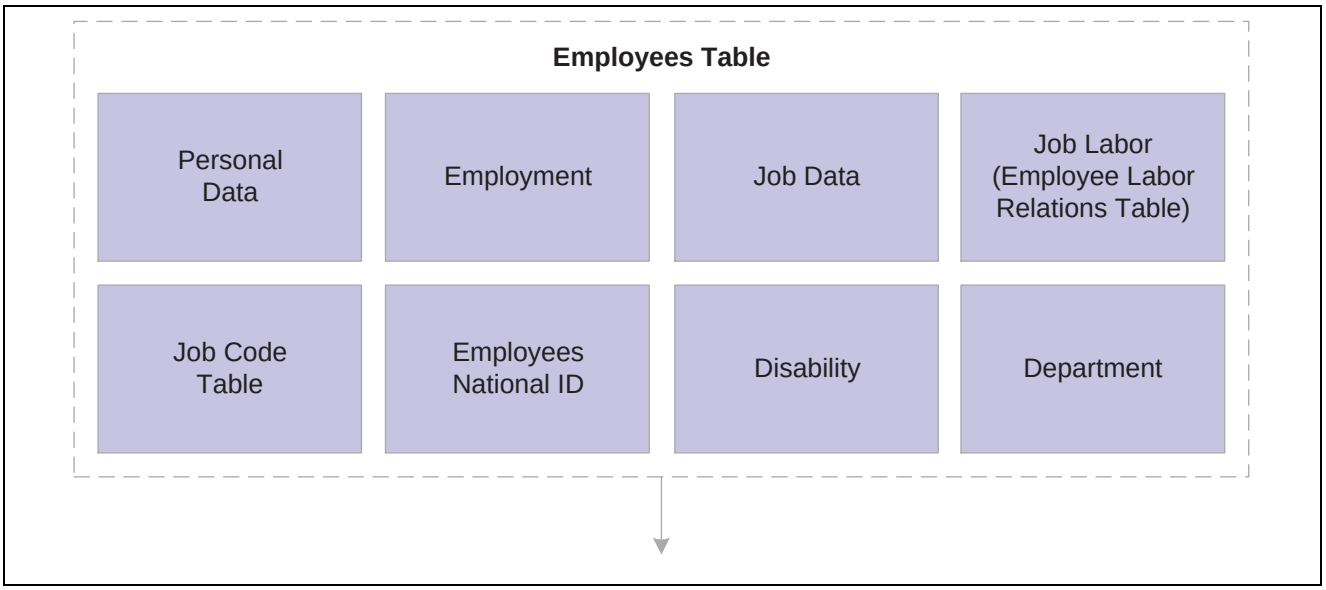
Page Name	Object Name	Navigation	Usage
Multiple Jobs	MULTIPLE_JOBS	Workforce Administration, Job Information, Review Job Information, Multiple Jobs Summary	View a summary of all jobs and changes in job status for people that have more than one employment record.

Refreshing Tables to Facilitate Reporting

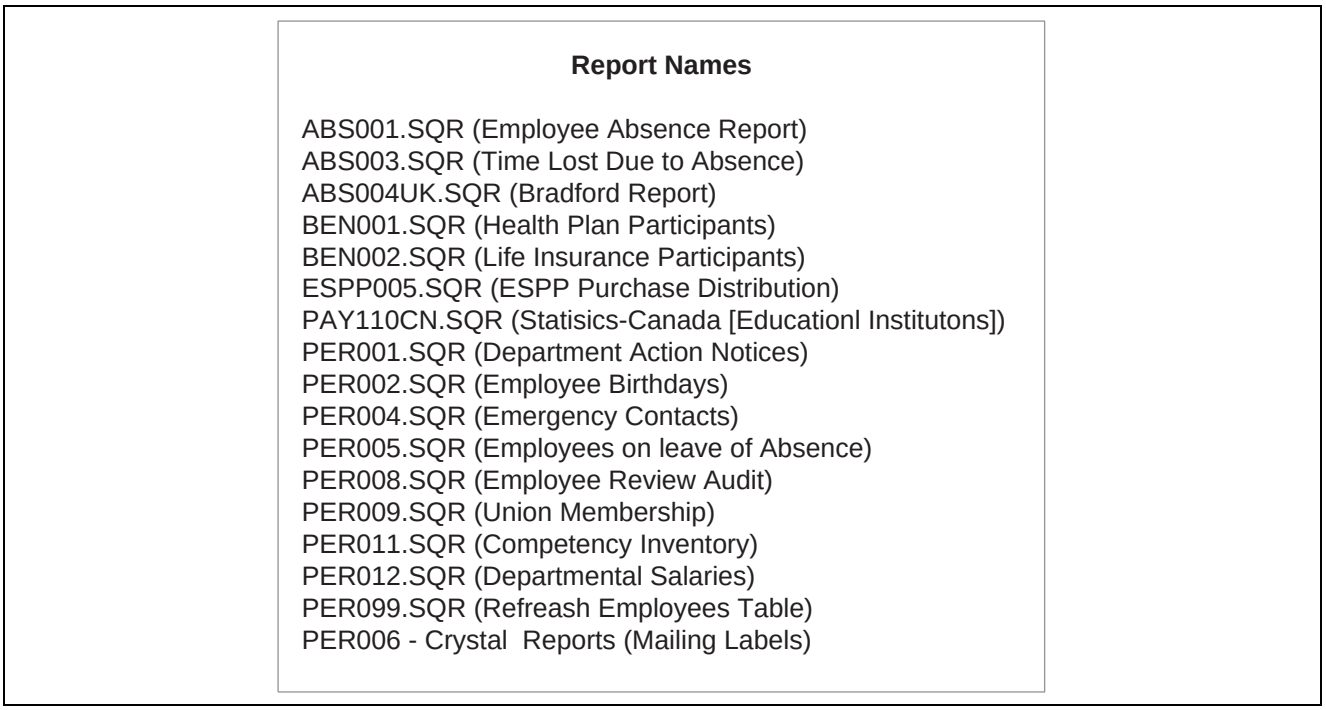
This section provides overviews of the process of refreshing the Employees table and the process of refreshing the Personal Data table, lists a common element, and lists the pages used to refresh tables to facilitate reporting.

Understanding the Process of Refreshing the Employees Table

To generate standard PeopleSoft Enterprise Human Resources reports quickly, many human resources reports retrieve data from the Employees table (PS_EMPLOYEES). To make reporting in PeopleSoft Enterprise Human Resources more efficient, this table combines information from the following tables: PERSON, PERS_DATA_EFFDT, NAMES, ADDRESSES, PERSONAL_PHONE, Job (JOB), Employment Data (EMPLOYMENT), Job Code (JOBCODE_TBL), Department (DEPARTMENT_TBL), Employees National IDs (PERS_NID), Job Labor (JOB_LABOR), and Disability (DISABILITY) into an extract file. The extract file's sole purpose is as a report source. Because it isn't updated dynamically when you add people or job records to the system or update their data (doing so would have negative online processing impact), you must refresh the Employees table before running any reports. When you run this process, the system updates the table with data that is valid before or on the as-of date that you specify.



Updating the Employees table by using the Refresh Employees Table process (1 of 2)



Updating the Employees table by using the Refresh Employees Table process (2 of 2)

A useful feature of the Employees table is that you can refresh it to show a specific date, so you can report based on how things were at that time. This might be useful if an organization needed to reconstruct its organization over the last several years to research its promotion policies.

Update the Employees table using the Refresh Employees Table Application Engine process (PER099) before running any of these reports so that the report contains all changes made to your employee files.

Understanding the Process of Refreshing the Personal Data Table

PeopleSoft Enterprise Human Resources reports also retrieve data from the Personal Data table. This table combines information from these tables: PERSON, PERS_DATA_EFFDT, NAMES, ADDRESSES, PERSONAL_PHONE. Like the Employees table, the Personal Data table is a report source only. It updates through the process described below. The Personal data table is synchronized with the online changes by using a Message Subscription process on the message PERSON_BASIC_SYNC. This means that any process that publishes the PERSON_BASIC_SYNC message causes the Personal Data table to be updated. You may want to refresh the Personal Data table before running reports, but the online process should keep it up to date. You can refresh the Personal Data table at any time without affecting the online updates.

Common Element Used in This Section

As Of Date Indicate the As Of Date to run the processes. The process selects the new data based on the date that you enter and populates the table. It includes only workers who are active, on leave of absence, or suspended. The process excludes any *terminated* workers.

Pages Used to Refresh Tables to Facilitate Reporting

Page Name	Object Name	Navigation	Usage
Refresh Employees Table - Parameters	RUNCTL_ASOFDATE	Set Up HRMS, System Administration, Database Processes, Refresh EMPLOYEES Table	Reflect back to a specific date or period for employee data reporting.
Refresh Personal Data Table - Parameters	RUNCTL_ASOFDATE	Set Up HRMS, System Administration, Database Processes, Refresh Personal Data	Update the Personal Data table.
Ad-Hoc Process Request	PRCSRUNCNTL	Workforce Administration, Workforce Reports, Request Ad-hoc Process	Run several or all Administer Workforce reports that do not require parameters.
As-of Date Request	RUNCTL_ASOFDATE	Workforce Administration, Workforce Reports, Create As-of Date Request	Run several or all Administer Workforce reports for which you specify an as of date.
Calendar Year Request	RUNCTL_CALENDARYR	Workforce Administration, Workforce Reports, Create Calendar Year Request	Run several or all Administer Workforce reports for which you specify a calendar year.
From/Thru Dates Request	RUNCTL_FROMTHRU	Workforce Administration, Workforce Reports, Create From/Thru Dates Request	Run several or all Administer Workforce reports for which you specify a from and through date range.

Running Database Audits

Database audits monitor changes, additions, or deletions made to sensitive fields such as salary amounts.

Page Used to Run Database Audits

Page Name	Object Name	Navigation	Usage
Database Audit	RUNCTL_FROMTHRU	Workforce Administration, Workforce Reports, Database Audit	Run the Database Audit report (PER029).

CHAPTER 14

Viewing Summary Workforce Information

This chapter discusses how to:

- View worker job history.
- (USF) View employee personal and job data.
- View other summary pages in PeopleSoft Enterprise Human Resources.

Viewing Worker Job History

Viewing worker job history provides a quick summary of important job details of current and historic work records.

This section discusses how to:

- View an worker's job history.
- View compensation information.

Pages Used to View Employee Job History

Page Name	Object Name	Navigation	Usage
Job Summary	JOB_SUMMARY	Workforce Administration, Job Information, Review Job Information, Job Summary	View an employee's job history.
Job Summary JPN	JOB_SUMMARY_JPN	Workforce Administration, Job Information, Review Job Information, Job Summary JPN	View a Japanese employee's job history, including additional appointment total. Access details of additional appointments.
Salary Components	COMP_JOB_SUMM_SEC	Click Componentson the Compensation tab of the Job Summary page.	View compensation information.
Comp Rate Code Secondary Panel (compensation rate code secondary panel)	COMP_RATECD5_SEC	Click Detailson the Salary Components page.	Review the description, compensation rate type, and rate code class associated with the rate code.

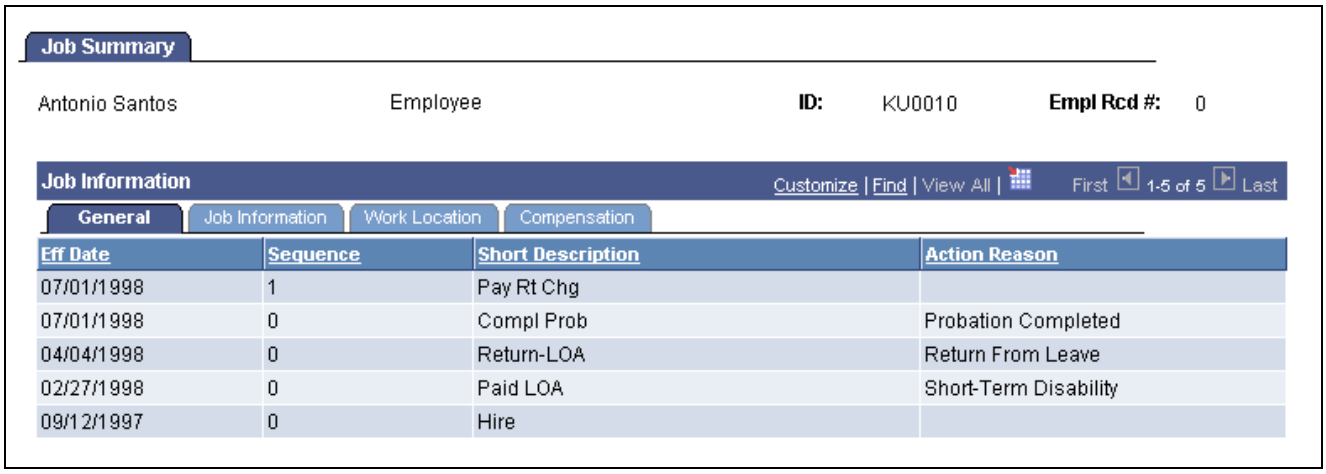
See Also

Chapter 4, “Adding a Person in PeopleSoft Human Resources,” page 55

Chapter 16, “(USF) Processing Personnel Action Requests,” page 413

Viewing a Worker’s Job History

Access the Job Summary page.



Job Summary page

The Job Summary page displays the person’s name and organizational relationship (contingent worker or employee), as well the person’s EmplID.

Common Page Information

Eff Date (effective date) and **Sequence** — Displays the effective date and effective date sequence, if any, available for each personnel action. The effective date sequence tracks actions that occur on the same day.

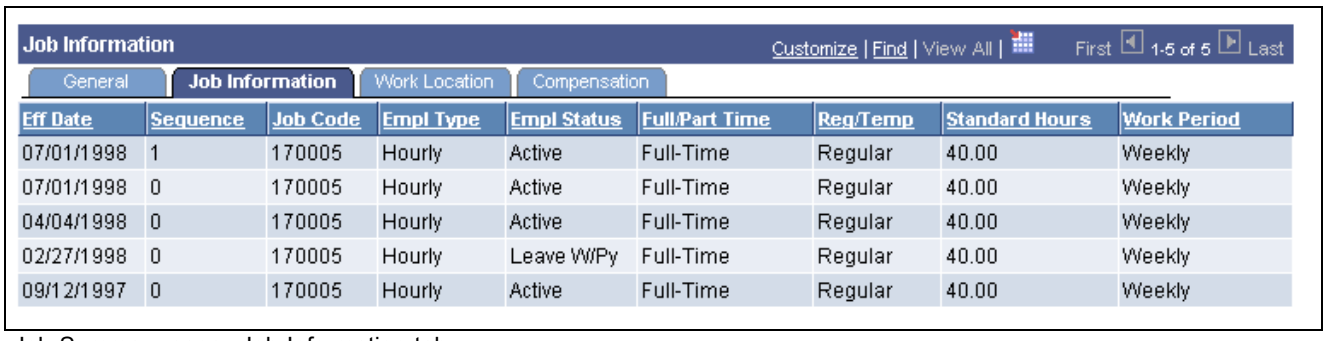
General

Select the General tab.

Action and **Action Reason** — Displays the action taken and reason for the row’s existence.

Job Information

Select the Job Information tab.



Job Summary page: Job Information tab

Job Code Displays the job code information for this worker after each personnel action.

Empl Type (employee type) Displays the worker type after each personnel action.

Empl Status (employee status) Displays the worker's status after each personnel action.

Full/Part Time Indicates whether the worker is full or part time after each personnel action.

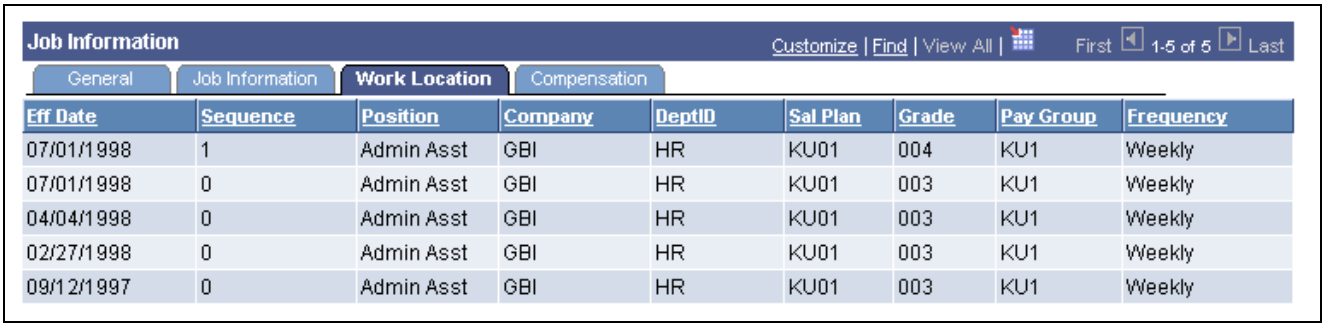
Reg/Temp Indicates whether the worker is regular or temporary after each personnel action.

Standard Hours Displays the standard hours per work period after each personnel action.

Work Period Displays the work period after each personnel action.

Work Location

Select the Work Location tab.



Job Information — Customize | Find | View All | First 1-5 of 5 Last

General | Job Information | **Work Location** | Compensation

Eff Date	Sequence	Position	Company	DeptID	Sal Plan	Grade	Pay Group	Frequency
07/01/1998	1	Admin Asst	GBI	HR	KU01	004	KU1	Weekly
07/01/1998	0	Admin Asst	GBI	HR	KU01	003	KU1	Weekly
04/04/1998	0	Admin Asst	GBI	HR	KU01	003	KU1	Weekly
02/27/1998	0	Admin Asst	GBI	HR	KU01	003	KU1	Weekly
09/12/1997	0	Admin Asst	GBI	HR	KU01	003	KU1	Weekly

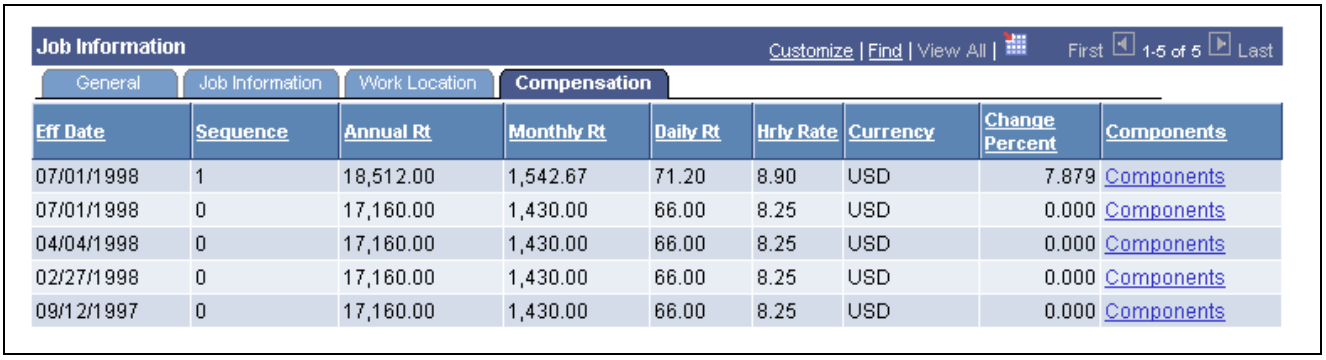
Job Summary page: Work Location tab

Position, Company, DeptID, (department ID) **Sal Plan,**(salary plan) **Grade, Pay Group, Frequency** The employee's position, company code, department ID, pay group, and frequency for the job the employee was or is in, as well as the salary plan and salary grade

Position Nbr (position number) If you're driving part or all of PeopleSoft Enterprise Human Resources by position, this field displays a position number for each position to which you've assigned this employee.

Compensation

Select the Compensation tab.



Job Information — Customize | Find | View All | First 1-5 of 5 Last

General | Job Information | Work Location | **Compensation**

Eff Date	Sequence	Annual Rt	Monthly Rt	Daily Rt	Hrly Rate	Currency	Change Percent	Components
07/01/1998	1	18,512.00	1,542.67	71.20	8.90	USD	7.879	Components
07/01/1998	0	17,160.00	1,430.00	66.00	8.25	USD	0.000	Components
04/04/1998	0	17,160.00	1,430.00	66.00	8.25	USD	0.000	Components
02/27/1998	0	17,160.00	1,430.00	66.00	8.25	USD	0.000	Components
09/12/1997	0	17,160.00	1,430.00	66.00	8.25	USD	0.000	Components

Job Summary page: Compensation tab

Annual Rt (annual rate), **Monthly Rt** (monthly rate), **Daily Rt** (daily rate), **Hrly Rate** (hourly rate), **Currency,** and **Change Percent**

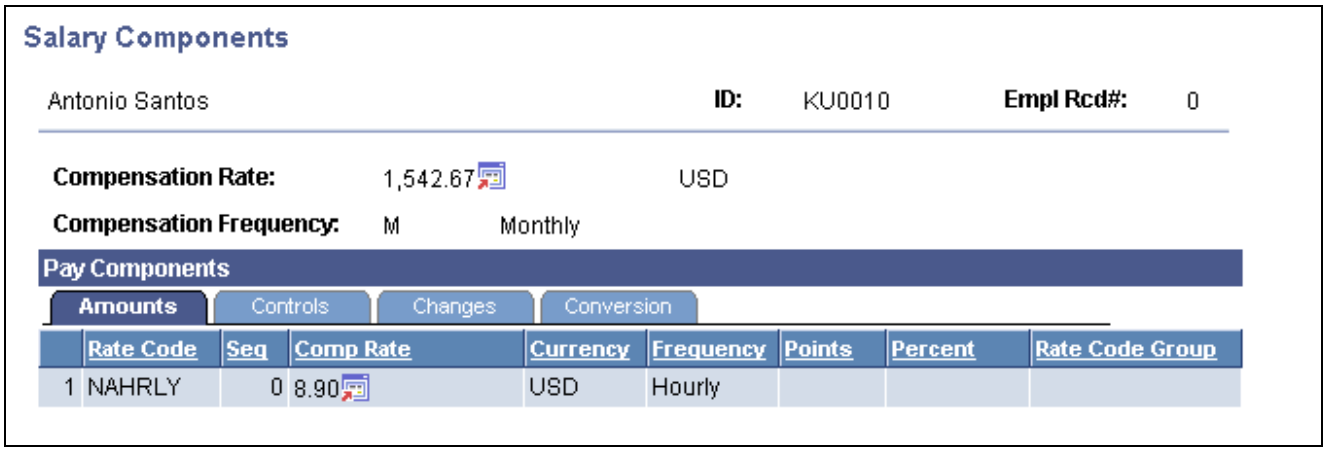
Displays the worker's compensation rate in annual, monthly, daily, or hourly terms in the given currency. When there has been a change in the compensation rate for this employee, the system displays the percentage of change from the previous row.

Components

Click to access the Pay Components page.

Viewing Compensation Information

Access the Salary Components page.



Salary Components page

Common Page Elements

Rate Code

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

Seq (sequence)

Indicates multiple occurrences of the same rate code.

Amounts

Select the Amounts tab.

Comp Rate (compensation rate) and **Currency**

Displays the compensation rate for the pay component rate codes and the currency.

Frequency

Displays the compensation frequency for the pay component's rate.

Points

Displays the salary points associated with this rate code, if there are any.

Percent

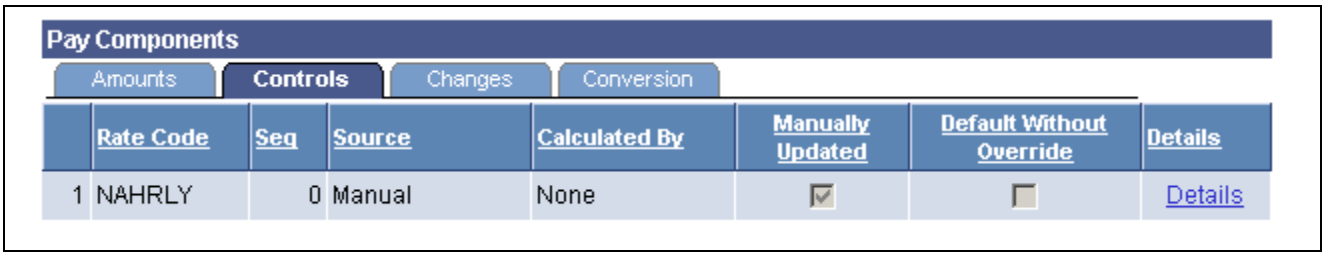
If the rate type for this rate code is percent, the system displays the percent to be applied to the job compensation rate or to a rate code group (if you are using rate code groups).

Rate Code Group

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

Controls

Select the Controls tab



Salary Components page: Controls tab

Source Indicates how the pay component was assigned to the Compensation grid. *Manual* indicates that the pay component was added manually; *Salary Step* indicates that the pay component was defaulted in from the Salary Step; *Job Code* indicates that the pay component was defaulted in from the job code definition, and so on.

Calculated by Values are:

- *None:* The rate value is assigned by the Rate Code definition or manually entered.
- *Rate Matrix:* The rate value is determined by a rate code matrix.
- *Extended:* Not used.

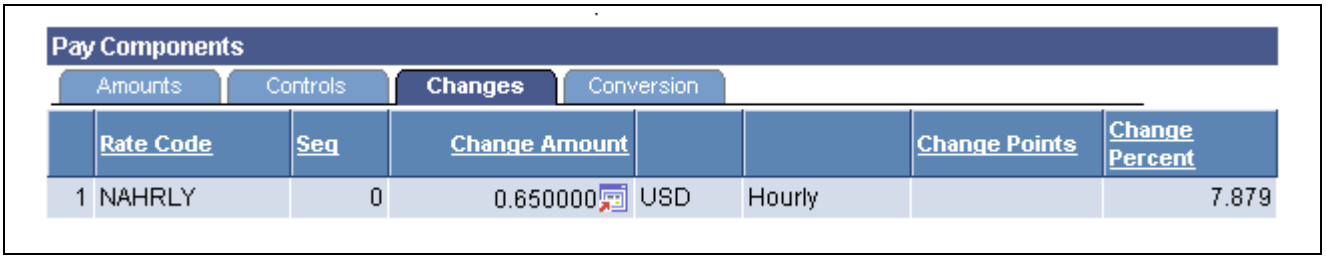
Manually Updated Indicates whether the pay component's value was manually entered or the pay rate contains only defaulted values.

Default Without Override Indicates whether the default rate value of the pay component can be overridden.

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

Changes

Select the Changes tab.



Salary Components page: Changes tab

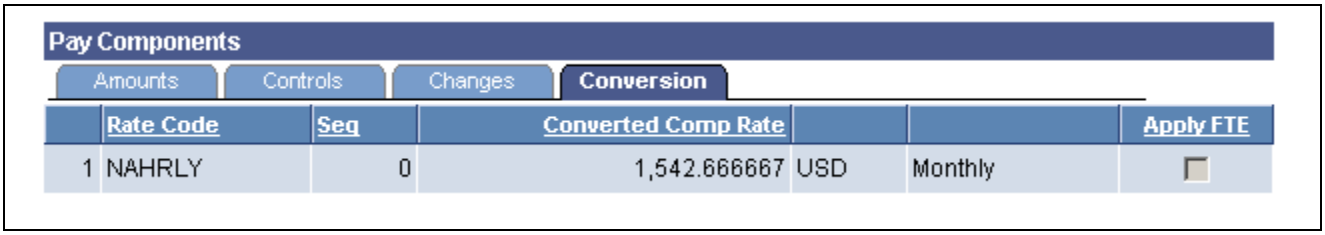
Change Amount Displays the overall change amount in this pay component rate relative to the previous Job Data row.

Change Points Displays the overall change amount (in points) for this pay component. This field is visible only if Salary Points is selected on the Installation Table page.

Change Percent Displays the overall change amount for this pay component. This field isn't available for rate codes that have a rate code type of percent or points.

Conversion

Select the Conversion tab.



Salary Components page: Conversion tab

Converted Comp Rate (converted compensation rate) Displays the converted compensation rate for this pay component. The system converts all base pay components to the currency and compensation frequency specified.

Apply FTE (apply full time equivalent) Indicates that the value associated with the rate code is to be multiplied by the FTE factor for annualization and deannualization. FTE is the percent of full time the employee should normally work in the corresponding job. This field isn't applicable for rate codes of type percent.

(USF) Viewing Employee Personal and Job Data

Use the Personal Data inquiry component to view employee personal and job data.

This section discusses how to:

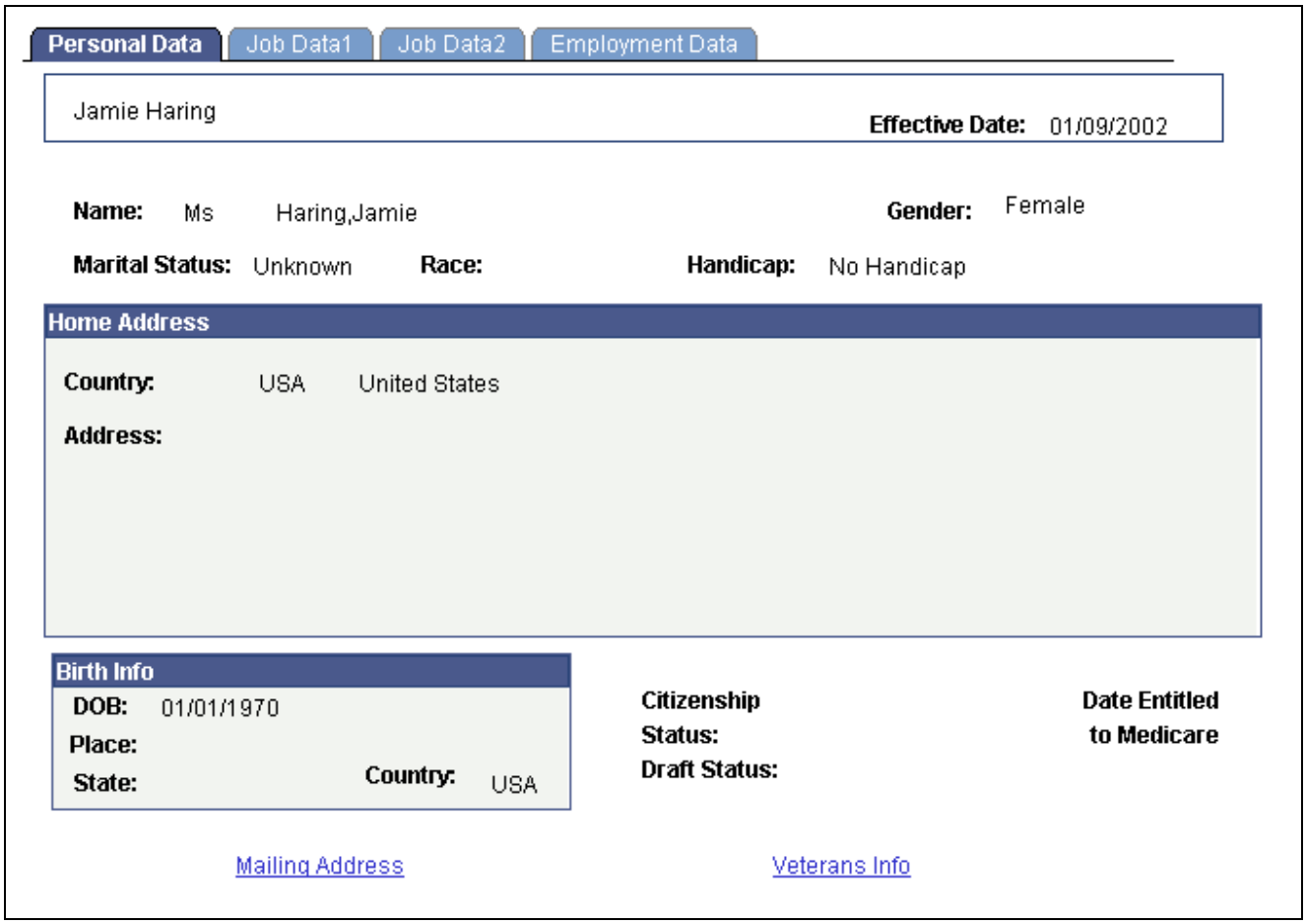
- View employee personal data.
- View employee job data.
- View employee benefit programs.

Pages Used to View Personal and Job Data

Page Name	Object Name	Navigation	Usage
Personal Data	GVT_PERS_INQ	Workforce Administration, Job Information, Review Job Information, Personal Data USF, Personal Data	View employee personal data.
Mailing Address	GVT_MAILADDR_SEC	Click Mailing Addresson the Personal Data page.	View the employee's mailing address.
Veterans Info (veterans information)	GVT_VETINF_INQ_SEC	Click Veterans Infoon the Personal Data page.	View veteran's information for this employee.
Job Data1	GVT_JOB_INQ	Workforce Administration, Job Information, Review Job Information, Personal Data USF, Job Data1	View employee job data.
Benefits/Retirement Data	GVT_BENDAT_INQ_SEC	Click Benefits/FEHB Dataon the Job Data1 page.	View the benefit program in which the employee is enrolled for benefits in PeopleSoft Enterprise Human Resources or in PeopleSoft Enterprise Benefits Administration.
Job Data2	GVT_JOB_INQ2	Workforce Administration, Job Information, Review Job Information, Personal Data USF, Job Data2	View additional job data, including quoted pay and expected pay information.
Employment Data	GVT_EMPLOY_INQ	Workforce Administration, Job Information, Review Job Information, Personal Data USF, Employment Data	View employment data.

Viewing Employee Personal Data

Access the Personal Data page.

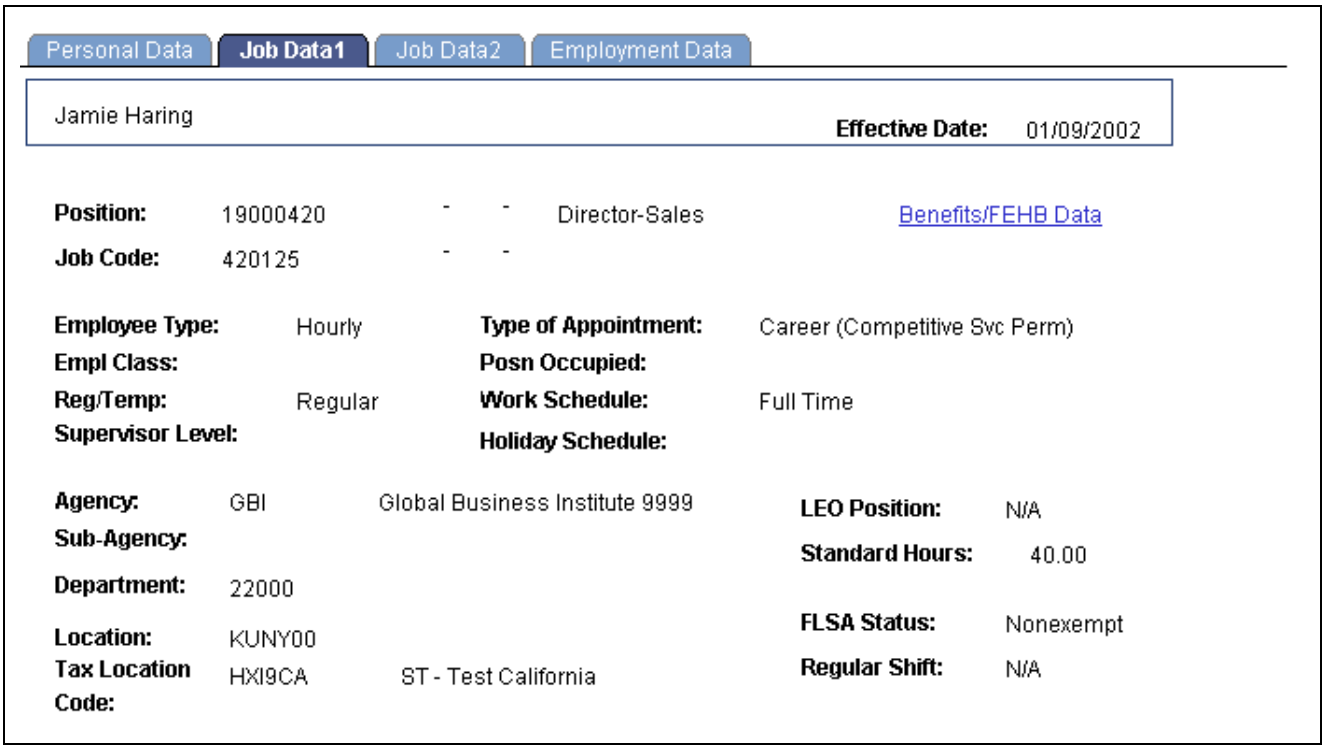


Personal Data page

The Personal Data page displays information on employee hire date, birth date, home address, marital status, birth information, citizenship, draft status, Medicare entitlement, race, and handicaps. Click the Mailing Address link to view the employee's mailing address. Click the Veterans Info link to view veteran's information for this employee.

Viewing Employee Job Data

Access the Personal Data - Job Data1 page.



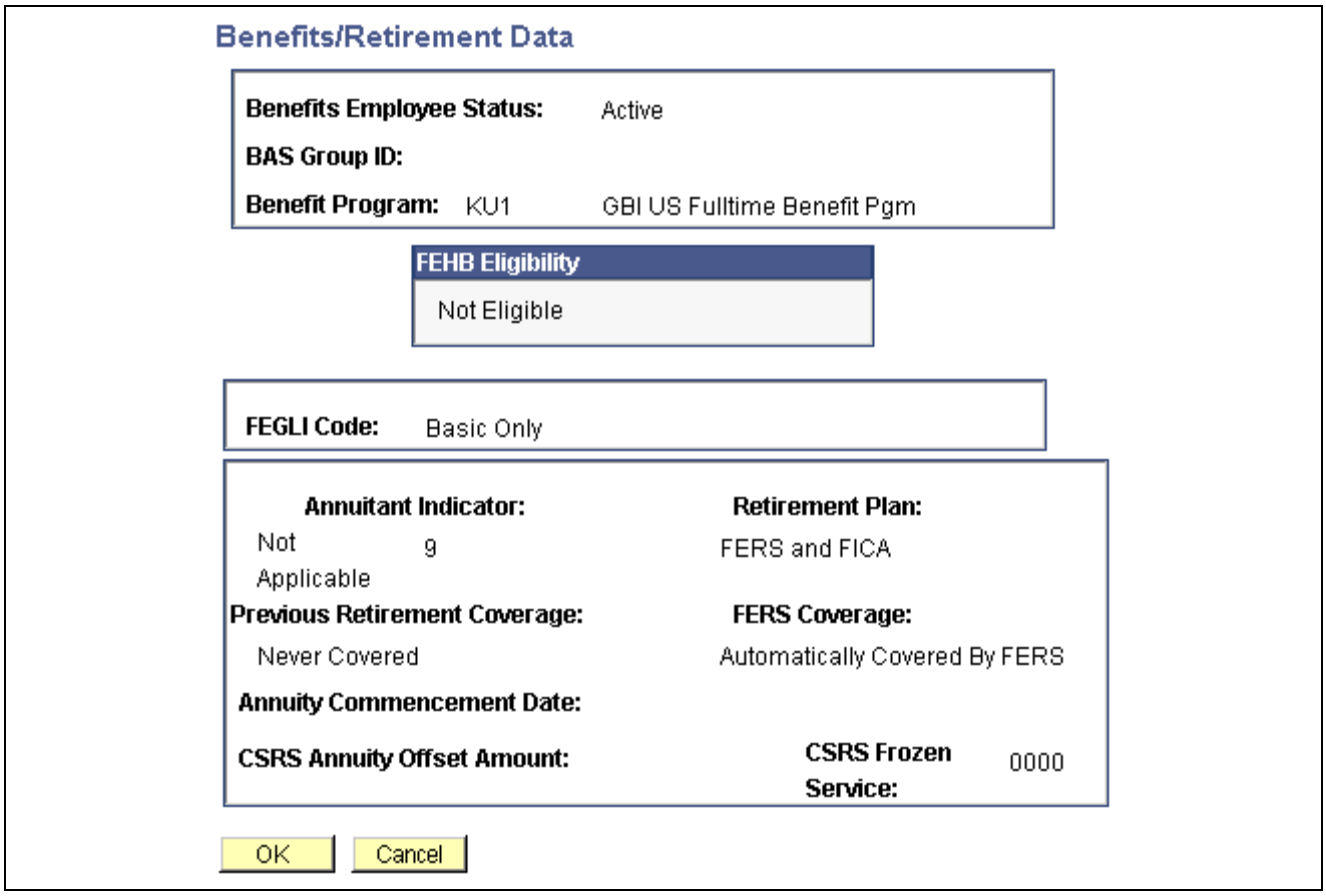
Personal Data - Job Data1 page

This page displays the employee's position number, job code, employee type, class, type of appointment, position occupied, work schedule, agency, subagency, department, location, tax location, LEO position, FLSA status, and other job-related information.

Click the Benefits/FEHB Data link to view information on this employee's benefits and retirement data.

Viewing Employee Benefit Programs

Access the Personal Data - Job Data1: Benefits/Retirement Data page.



Personal Data - Job Data1: Benefits/Retirement Data page

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Benefits, "Setting Up Base Benefits Core Tables"

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Benefits, "Enrolling Participants"

Viewing Other Summary Pages in PeopleSoft Enterprise Human Resources

Several other display-only pages summarizing employee data are available for you to review in PeopleSoft Enterprise Human Resources. Most of them derive information that you enter in other PeopleSoft Enterprise Human Resources business processes, such as Planning Compensation, Track Global Assignments, and Administering Training. However, you'll also find them useful for planning and analysis when you work in the Workforce Administration menu.

Following are some of the summary pages:

- Employee Data Summary: Displays information on employee current status, hire date, birth date, marital status, standard work hours, pay group, job code, and other job- and compensation -related information.

  Benefits, Employee/Dependant Information, Review HR/Job/Payroll Data

- Organizational Summary: Displays a summary of all the organizational relationships for a person. Workforce Administration, Personal Information, Person Organizational Summary.
- Career Assignment summary: Displays the actual job path the employee has followed in the organization. By tracking employee movements through salary structures and manager levels, you'll get a feel for where the employee has been in your organization so far. Workforce Development, Career Planning, Review Career Summaries, Career Assignments.
- Compensation History: Displays the history of all pay rate changes the employee has received, which is particularly useful when you are planning new increases. Compensation, Base Compensation, Review Salary Information, Employee Compensation History. The Compensation History page is also in the Workforce Development, Career Planning, Review Career Summaries folder.
- Immediate Family Summary: Lists all dependents that are a part of the employee's immediate family. Immediate family is defined as dependents that are the employee's spouse, son, or daughter. You'll find this page helpful for determining eligibility for various types of benefits your organization offers to employees, their spouses, and children. Benefits, Employee/Dependant Information, Review Dep/Ben Summary.
- Training Summary: Displays student training history, which is helpful when determining whether students are receiving adequate training to perform their current jobs; to see if they've taken all course prerequisites; and for career and succession planning. Enterprise Learning, Result Tracking, Review Training Summary.
- Injury Summary: Provides an overview of the health and safety incidents in which this individual has been involved, including injuries and illnesses and the nature of the incidents. Workforce Monitoring, Health and Safety, Obtain Accident Information, Review Employee Injury Summary.

CHAPTER 15

(USF) Administering Personnel Action Requests

This chapter provides an overview of administering personnel action requests (PAR) and discusses how to:

- Track and route a personnel action request (PAR) through reviews and completion.
- Initiate and request personnel actions.
- Authorize and approve personnel actions.
- Process human resources personnel actions.
- Cancel or correct a personnel action request.
- Print Request for Personnel Action (SF-52) and Notice of Personnel Action (SF-50) reports.
- View summary pages.
- Generate a Personnel Actions History report.
- Generate a Wage and Separation report.

Understanding the Administering PAR System

The administering PAR system provides you with the power to process action requests quickly and easily. The system automatically routes a wide variety of requests directly to reviewing officials, and on to human resources, in the path your agency designates.

If anyone needs further information, the system automatically routes that inquiry back to the originator. All involved are included in the communication loop and always know that their requests are moving through a well-mapped review, authorization, and approval cycle.

Note. Keep in mind that the description and samples described throughout this book are illustrative, flexible models that you can adapt for your agency's personnel administration system. Your agency can set up the Administer Workforce system routing, security, accessing, processing, and many other features to meet your individual agency needs and requirements.

Using a streamlined menu structure, you can navigate quickly and easily through the whole process. Using PeopleSoft workflow, you indicate the level of authorization and the system routes the request through the process for you.

Significant features of the PAR system include:

- Flexible work-in-progress processing.
- Cancellation and correction functionality.
- Reviewed flag processing for retroactive personnel actions.

- Enhanced navigation with pages.
- Issuing awards and bonuses.
- Detail assignment processing.
- Support for the personnel office identifier (POI) signature requirement.

Common Elements Used in This Chapter

PAR Status

The PAR status code automatically defaults to *Requested* for new actions. Leave this as a work-in-progress request with that status until you have complete data. After you have completed all the necessary information, keep the PAR status as *Requested* to send it on to human resources officials for approval and processing.

If you aren't ready to submit the request, change the status to *Initiated,* and keep working on it until you're done. Change the status to *Requested* to submit it.

After completing the HR Request pages and reviewing the data, assign a status of *Processed by HR* to approve and finalize this request.

Once you assign the status of *Processed by HR,* the request becomes an actual event and is posted in the system to interface with PeopleSoft Enterprise Payroll, Manage Base Benefits, or other related areas.

If the request is invalid or needs further information, assign a status of *Disapproved* or *Return to Sender.*

Prerequisites

Begin every personnel action request on the Data Control page. The first time you open the page, the most recent personnel action request appears automatically. Before creating a new request, you must insert a new row for all actions or changes.

In order to save time, the system assumes you want to continue viewing and updating information on the same employee, so when you move to a new page in the group, information for that same employee appears automatically.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "(USF) Setting Up Human Resources Management Tables"

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "(USF) Setting Up the Work-in-Progress Management System"

Chapter 6, "(USF) Hiring Employees," Entering Information for the Hiring Process, page 146

Understanding Workflow

Many of the tasks you perform throughout the day are part of larger tasks that involve multiple steps and several people in your organization working together. PeopleSoft workflow tools help you build the larger process into your PeopleSoft Enterprise Human Resources system, automating vital business tasks. You can tie together the individual steps so that PeopleSoft can help coordinate the activities. Because the system has the big picture and knows what you are trying to accomplish, it can automatically start the next step in the workflow, following your organization's business rules.

Using workflow capabilities for administering personnel actions, the PAR status indicates the steps in routing and provides employees, supervisors, and human resources professionals easy access, surveillance, and security in the request management process. While providing options along the way for more time, further information, or return to sender, workflow routes requests by sending personnel actions through a cycle to initiate, request, authorize, and approve requests. Workflow then sends them on to human resources for final processing. The automated workflow process ensures the action request goes through all the reviews your agency needs until it becomes an actual event.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Delivered Workflows for PeopleSoft HRMS"

Tracking and Routing a PAR Through Reviews and Completion

The Employee Request, Supervisor Request, and HR Request components are identical. The only difference is in the type of data that is accessible to each group, according to security options and allowable actions.

Note. The information you need to track and route a PAR is the same type of information you enter to hire employees. Use the same pages for both.

Your agency determines the actions and data available to employees, supervisors, and human resources officials. Actions may include creating requests, issuing approvals and authorizations, and finalizing actions. Actions also include returning an action to the originator; asking for more information; or withdrawing, canceling, or correcting an action. Decisions on these issues are implemented using the WIP Activity Table (work-in-progress activity table) page.

Employees may request only their allowable actions; therefore, a user sees only certain options, such as Family/Benefits Change or Retirement. Supervisors may request, approve, and authorize those and other specific actions. When a supervisor opens the pages, their list reflects whatever your agency designates, such as promotion, demotion, detail assignment, reassignment, bonuses and awards, and others. They may also return an action to the originator for more information, or disapprove a request and render it inactive.

Human resources officials have the authority to initiate, approve, and finalize all possible actions. Therefore, human resources officials, along with hiring, tenure changes, and other actions that an employee or supervisor wouldn't usually initiate, can access *all* of the personnel actions in any phase of the cycle. For *finalized* actions that have already completed the processing cycle, human resources has the exclusive right to cancel and correct.

The PAR processes provide both flexibility and modification capacity. You can process new personnel actions that are effective-dated prior to existing personnel actions and define the codes for requests in a truly user-defined environment.

See Also

Chapter 6, "(USF) Hiring Employees," Using the PAR Process to Hire Employees, page 141

Adding and Updating Data

For U.S. Federal Government customers, to add, update, or change any employee data, you create a PAR. To submit and route and track a PAR automatically through the approval process, assign a PAR work-in-progress status code that indicates its position in the request cycle and determines where to send it.

Automatically Routing the PAR

By changing the request status and saving the page, reviewers acknowledge receipt and approval, and send a PAR forward through workflow. Each review level serves as verification that the information is complete and that the necessary documents are attached. The reviewers may also enter their own comments. Your agency can set up and route request cycles for each type of request from creation through various reviews, including as many or few reviews as desired, and on to final Human Resources completion.

Selecting a PAR Status

If you want to open a request, fill in partial data and then complete it later, open a request and assign a PAR status of *Initiated.* While you gather additional information, the request stays within your own domain and control. You can revisit it as often as needed until you are ready to submit it for review.

When your request data is complete and you want to proceed with the automatic routing review cycle, submit the request by assigning a PAR status of *Requested.* By doing so, you make the request official. Once the originator submits a *Requested* action, workflow retrieves it and automatically routes it to others who are involved in the processing, and the authorizing and approving officials review its merits. It may go through a review cycle that includes *1st Authorized* and *2nd Authorized* by specific supervisors and managers, *Approved/Signed* by second-level managers, and finally to the status of *Processed* (processed by HR), according to your agency's requirements.

If clarification or additional information is needed, a reviewer can choose the status of *Returned for More Information.* Returning it to the originator restarts the process. A reviewer can also disapprove a request by assigning the *Disapproved* status, which stops the process altogether. During the review cycle, the originator can also withdraw a request while it is still in a work-in-progress state.

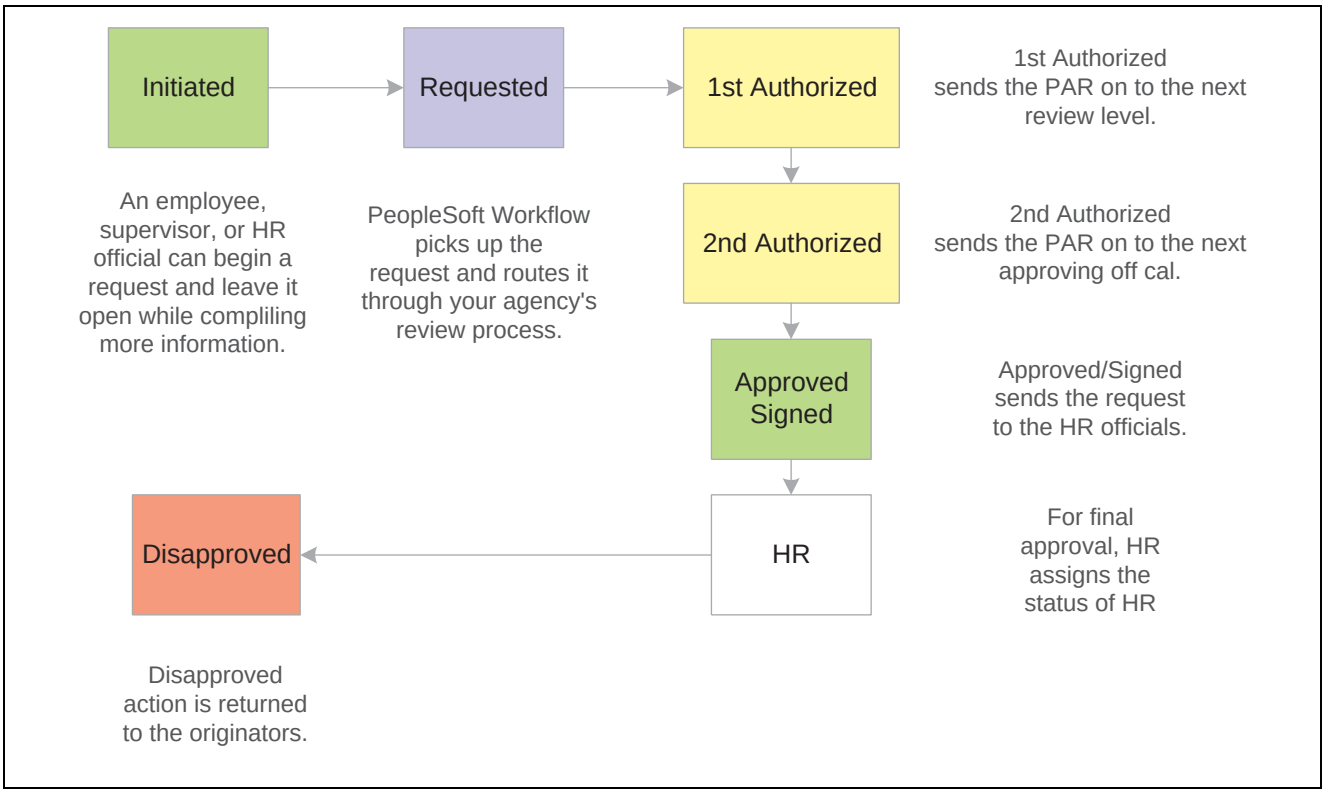
Only the originator can cancel or change and resubmit a request that is in progress. Because other supervisors, managers, and human resources officials don't have the ability to change request data, if a request needs to be *Canceled,* you must return it to the originator.

When a user chooses a work-in-progress status and assigns a PAR status code, this code indicates the request's status and position and enables workflow to route and monitor it through the approval cycle.

We provide a general example of the review cycle, though your agency can set it up differently if necessary.

An Overview of PAR

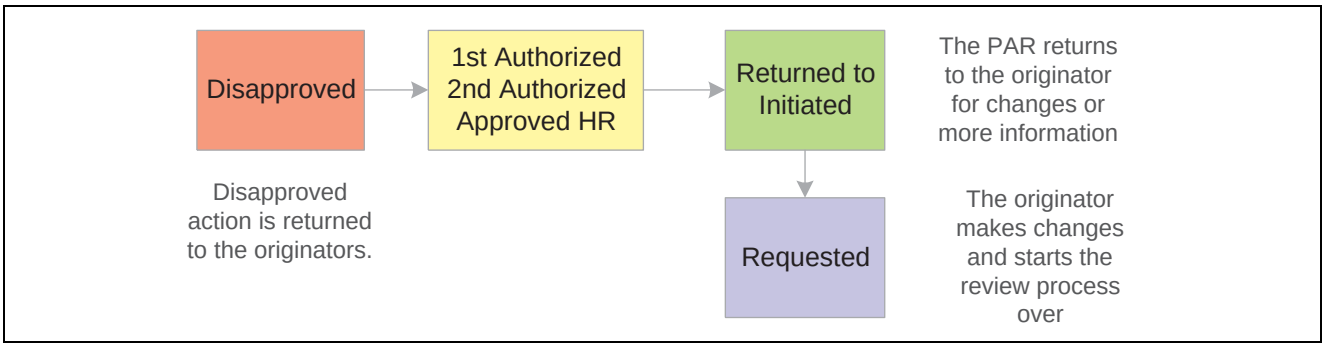
This illustration shows an overview of a sample process:



An example of the process of approving a PAR

Disapproving or Returning a Request

This illustration shows an overview of a sample process disapproving or returning a request:

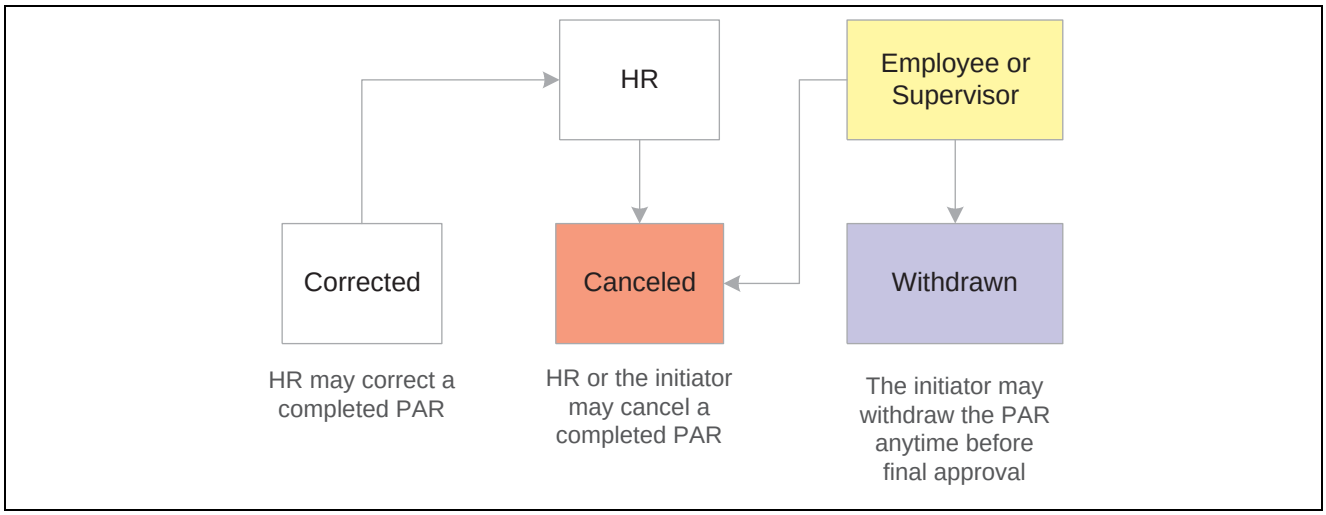


Example of return or disapproval of a PAR before completion

Note. Although a status of Returned/Disapproved is delivered, workflow isn't part of this feature.

Cancellation, Correction, or Withdrawal of a Request

This illustration shows an overview of a sample process canceling, correcting, or withdrawing a request:



Example of cancellation, correction, or withdrawal of a PAR

Identifying PAR Status Codes

Following are definitions for each work-in-progress status and PAR status code that are set up in the sample data delivered with your system:

Work-In- Progress Status	PAR Status Code	Definition
Initiated	INI	Indicates an action is open, but not yet submitted as a request. For various reasons, originators may begin a request and then find they need additional time or data before completing their work on that action. By assigning a status of *Initiated,* originators can leave the request open until it is ready to submit. Supervisors may need extra time to develop supporting documentation, such as job codes, and can assign a status of *Initiated* to designate that their work is in progress.
Requested	REQ	To submit a request, assign a status of *Requested.* Most requests then go automatically to the first-level supervisor for approval. An exception is the request for family/benefits change; you may want to set the system up to send this type directly to a human resources (HR) official to be processed. Or when a request originates in the HR department, it may go directly to an HR official to be processed.
1st Authorized	1st	The first-level reviewer assigns a status of *1st Authorized* to send a request forward to the next review level.
2nd Authorized	2nd	A first-level reviewer sends a request forward to the next review level by assigning a status of *2nd Authorized.*

Work-In- Progress Status	PAR Status Code	Definition
Approved/Signed	SIG	A second-level reviewer sends a request forward to an HR official to be processed by assigning a status of *Approved/Signed.*
Processed By Human Resources	PRO	Only human resources officials can assign the status of *Processed By Human Resources*. They first review and complete the request and may add the appropriate nature-of-action code, legal authorities, and remarks. They indicate final approval by assigning the status of PRO. The request then becomes an actual event. A status of PRO is final and can't be changed by anyone. Once a request becomes an actual event, it is then available for further consideration and processing by payroll, benefits, interface reports, and other areas.
Return for More Information	RET	Anywhere in the process, a reviewer can request more information or clarification by assigning a status of *Returned for More Information* and can include a comment such as, "I need further information." The request goes back to the originator. When originators get the returned request, they add the information, reassign a status of *Requested,* and the process begins again.
Withdrawn	WTH	The original creators of the request may withdraw a request if it is sent back to them for any reason. Human resources may withdraw a request when it is proven invalid or for some reason no longer is needed. Note that a request can not be withdrawn after it has been either processed or disapproved.
Disapproved	DIS	At any point in the process, a reviewer can disapprove a request by assigning a status of *Disapproved* and entering the reason in the Comments field. This causes the request to be sent back to the originator either for cancellation or for the originator to change and resubmit it.
Corrected	COR	Only a human resources official has the authority to perform a correction after a request has completed the approval cycle and been finalized.
Canceled	CAN	A human resources official has the authority to perform a cancellation after a request has completed the approval cycle and been finalized. The *Canceled* status removes the request from the active request system, leaving only the tracking record history. Or if the originator receives a returned request, the originator may assign a status of *Canceled.*

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Delivered Workflows for PeopleSoft HRMS"

Processing of PAR Actions

The PeopleSoft Enterprise Human Resources USF functionality has separate tables for managing PAR, and these tables hold data until each action has been approved and completed by human resources. Any records held in the separate tables haven't completed the PAR process and don't exist to the rest of the system. After completion, the data is automatically updated to system tables to enable other processes, such as those in PeopleSoft Enterprise Payroll, Benefits Administration, and Time and Labor.

To support the PAR processing concept, all of these records have been effective-dated and have been tied together with common keys. Because the three records (GVT_JOB, GVT_PERS_DATA, and GVT_EMPLOYMENT) work as one, a row is inserted into all three records when a user inserts a row on the Data Control page.

Once a PAR has successfully worked its way through the approval process, is processed by human resources as completed, and has become an actual event, it is ready to be copied into the three counterpart records (JOB, PERS_DATA_EFFDT, and EMPLOYMENT). The process is accomplished instantly, and the user is unaware of the updates to the other tables.

However, if the PAR action has an effective date that is later then the system date, only JOB is updated when the action is saved. PERSONAL_DATA and EMPLOYMENT are updated only when the date of the action is equal to the system date. This is because the counterpart to GVT_JOB, which is JOB, is effective-dated. Therefore, it receives the future effective-dated action and ignores it until that date.

Initiating and Requesting Personnel Actions

Most of the various PARs are created in a similar way. A good representative example is a family/benefits change request, which is reviewed in this chapter. Other chapters of this book cover other examples of the most highly used requests, such as hiring, awards and bonuses, leave with or without pay, data changes, and termination.

The only significant differences between submitting the various requests are the action and reason codes that you assign and the data that is entered. Most of the requests involve similar steps: You begin on the Data Control page, insert a new row and indicate the desired action, and then tab to another data page in the same group to enter further information, if necessary.

For example, when you initiate a request for changing benefit choices, enter data on the Data Control page and then move to the Personal Data page. For some requests, such as a leave without pay action, however, you enter data *only* on the Data Control page.

You can always view data on other pages, and view summary pages, for decision-support purposes.

See Also

Chapter 6, "(USF) Hiring Employees," Using the PAR Process to Hire Employees, page 141

Chapter 16, "(USF) Processing Personnel Action Requests," page 413

Authorizing and Approving Personnel Actions

Once a request has been submitted, the PeopleSoft workflow system automatically routes the request to designated supervisors and managers for authorizations and approvals.

Supervisors and human resources officials can approve and authorize requests that cover many possible actions involving hire, return to duty, leave with or without pay, suspension, promotion, bonus, award, change in pay, and others. They can also return a request and ask for more data or disapprove it so that it is returned to the originator and its cycle ended.

If you are a designated reviewer, you see the request item in your worklist if you are using the PeopleSoft Navigator display. To authorize or approve a request, click Work It!, and the system automatically transfers you to the 1st Rqst Authorization, 2nd Rqst Authorization, or Approve Request component. You can also access the request from the Workforce Administration, Job Information menu.

You see the exact same screens that the initiator entered data into, beginning with the Data Control page. However, the information you see is display only and unavailable for entry. Review the data on the Data Control page, including the PAR Remarks and Tracking Data, as well as data on any other page that is relevant to the request. To approve the request, change the PAR Status code on the Data Control page to the appropriate choice, such as *1st Authorized, 2nd Authorized,* or *Approved/Signed.* The request is then routed to human resources officials for completion and processing.

If you need more information or want to disapprove the request, change the PAR Status code to *Return for More Information* or *Disapproved.*

The authorization process works exactly the same way regardless of what the request is, such as data change, award, bonus, or recruitment. Once the authorizing officials have completed their work and entered a new PAR status code, the request goes automatically to the next level in the process.

Process Human Resources Personnel Actions

Once a Personnel Action request (PAR) has been through the initiation and request process and has passed the authorization and approval processes, it goes to the human resources office for final processing. A human resources official can submit human resources-specific actions and review and finalize personnel actions that have already been requested, authorized, approved, and are ready to become actual events.

The HR Processing pages are reserved specifically for the human resources officials and as a result contain overviews, controls, and additional navigational capacity. The HR Processing pages enable you to *access* personnel actions, *view* data, *finalize* actions, and *print* reports.

The HR Processing (USF) component is similar to the Supervisor Request, 1st Rqst Authorization, and 2nd Rqst Authorization components, however the HR Processing (USF) component contains additional PAR Status options.

Canceling or Correcting a Personnel Action Request

Once a request has the PAR status *Processed by HR,* it remains as a record in the system. However, it is possible to correct or cancel it by, essentially, creating a new action that references the initial request and gives it a new status. Only human resources officials may perform a correction or cancellation.

Only processed rows are available for correction or cancellation. If an employee has an unprocessed transaction, you will be unable to correct or cancel a previous transaction until all of the employee's unprocessed rows have been successfully processed.

To access a processed request that you want to correct:

1. Open a new request in the Data Control page of the Correct Personnel Action USF component.
2. Click the Insert Row button or press F7 to insert a new row, and enter the correct data.

   The system automatically enters a PAR Status of *COR*.

To access a processed request that you want to cancel:

1. Open a new request in the Data Control page of the Cancel Personnel Action USF component.
2. Click the Insert Row button or press F7 to insert a new row.

   The system automatically enters a PAR Status of *CAN*.

See Also

Chapter 6, "(USF) Hiring Employees," Using the PAR Process to Hire Employees, page 141

Printing Request for Personnel Action (SF-52) and Notice of Personnel Action (SF-50) Reports

Employees and supervisors can print an action request (SF-52) anytime. Human resources officials can also review a personnel action request report (SF-50) that summarizes various aspects of employee and job request data in printed form.

This section discusses how to:

- Print an action request (SF-52).
- Run the Personnel Action Report.

Pages Used to Print a Request for Personnel Action /Notice of Personnel Action

Page Name	Object Name	Navigation	Usage
Data Control	GVT_JOB0	• Workforce Administration, Job Information, Hire Employee USF, Data Control • Workforce Administration, Job Information, Employee Request USF, Data Control • Workforce Administration, Job Information, Supervisor Request USF, Data Control • Workforce Administration, Job Information, HR Processing USF, Data Control	Print an action request (SF-52).
Notice of Personnel Action USF - Parameters, Request Personnel Action USF - Parameters	RUNCTL_PAR	• Workforce Administration, Job Information, Reports, Notice of Personnel Action USF, Parameters, Parameters • Workforce Administration, Job Information, Reports, Request Personnel Action USF, Parameters, Parameters	Print the official Notification of Personnel Action form used to notify employee and payroll office of the action, record the action in the Official Personnel Folder, and provide a chronological record of actions that have occurred.
Notice of Personnel Action USF - Select Data, Request Personnel Action USF - Select Data	RUNCTL_PAR2	• Workforce Administration, Job Information, Reports, Notice of Personnel Action USF, Parameters, Select Data • Workforce Administration, Job Information, Reports, Request Personnel Action USF, Parameters, Select Data	After filtering the data with the parameters defined on the Parameters page, use the Select Data page to select employee data for printing PARs.

Printing an Action Request (SF-52)

Access the Data Control page.

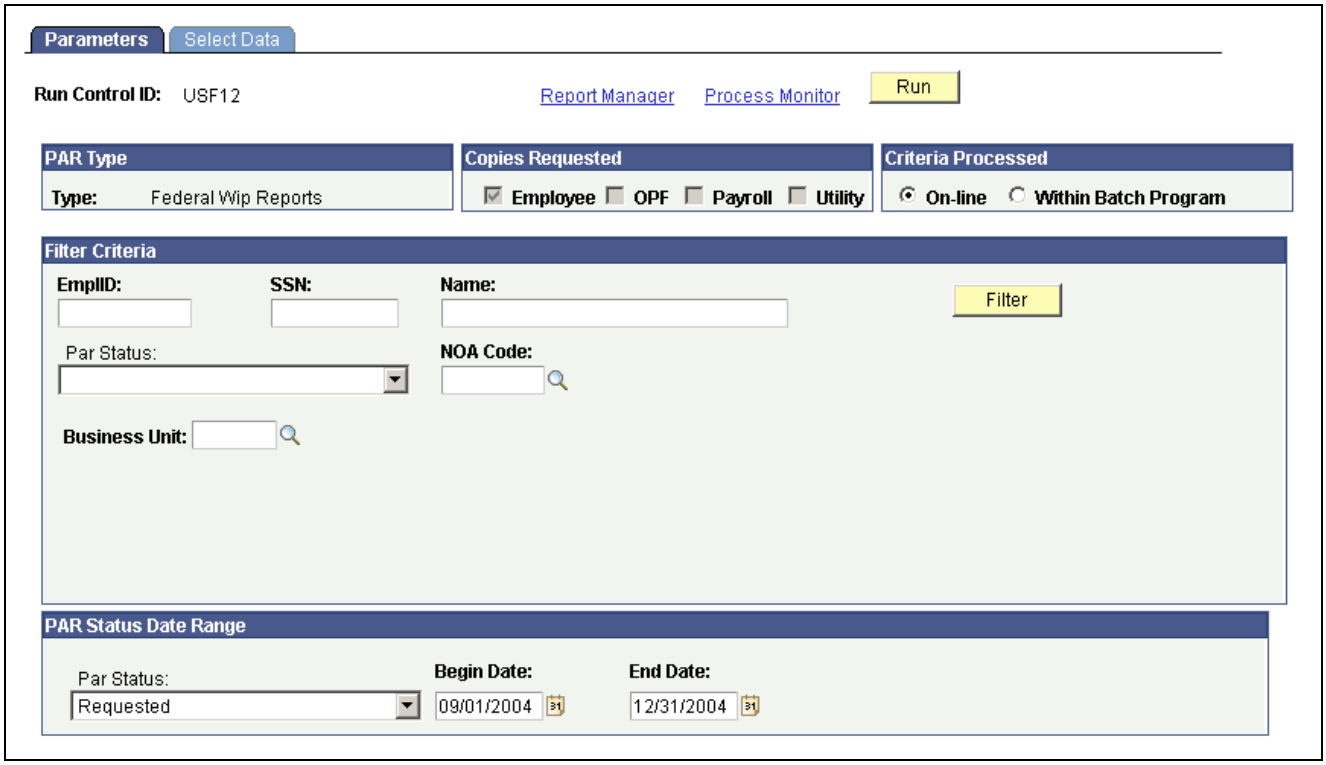
To produce a printed Request for Personnel Action form (SF-52), click the Print SF-52 button. The system asks whether to print the SF-52 to the Web or to a file. If you choose File, you must specify the file location.

Before saving and printing this request, ensure that the employee ID is the one you want to appear on the form. An assistant processing an action on an authorized official's behalf, who wants that official's information to appear on the SF-52 and become part of the official audit trail for this action, should select the Override Opr EmplID check box and enter the employee ID and employee record number of the official for the action on the Job Tracking Info page.

If you want to print to a file, specify the name of the output file (including the drive and directory names). Once you enter these parameters, the system runs a Structured Query Report (SQR) to create the SF-52 for you. You can print an SF-50 only when the action has a status of *Processed by HR*.

Running the Personnel Action Report

Access the Notice of Personnel Action USF - Parameters page or Request Personnel Action USF - Parameters page.



Request Personnel Action USF - Parameters page

PAR Type (personnel action request) This field is available for entry only if you selected the Request for Personnel Action menu item. Select the type of PAR that you want to print.

Copies Requested This group box is available for entry only if you selected the Notification of Personnel Action menu item. Select the copies that you want to print. Available values are Employee, OPF, Payroll, and Utility.

Criteria Processed The following elements appear in the Criteria Processed group box.

On-line Select if you want to immediately print the PARs you select.

Within Batch Program Select if you want to save your filtering criteria for later processing.

Filter Criteria The following elements appear in the Filter Criteria group box.

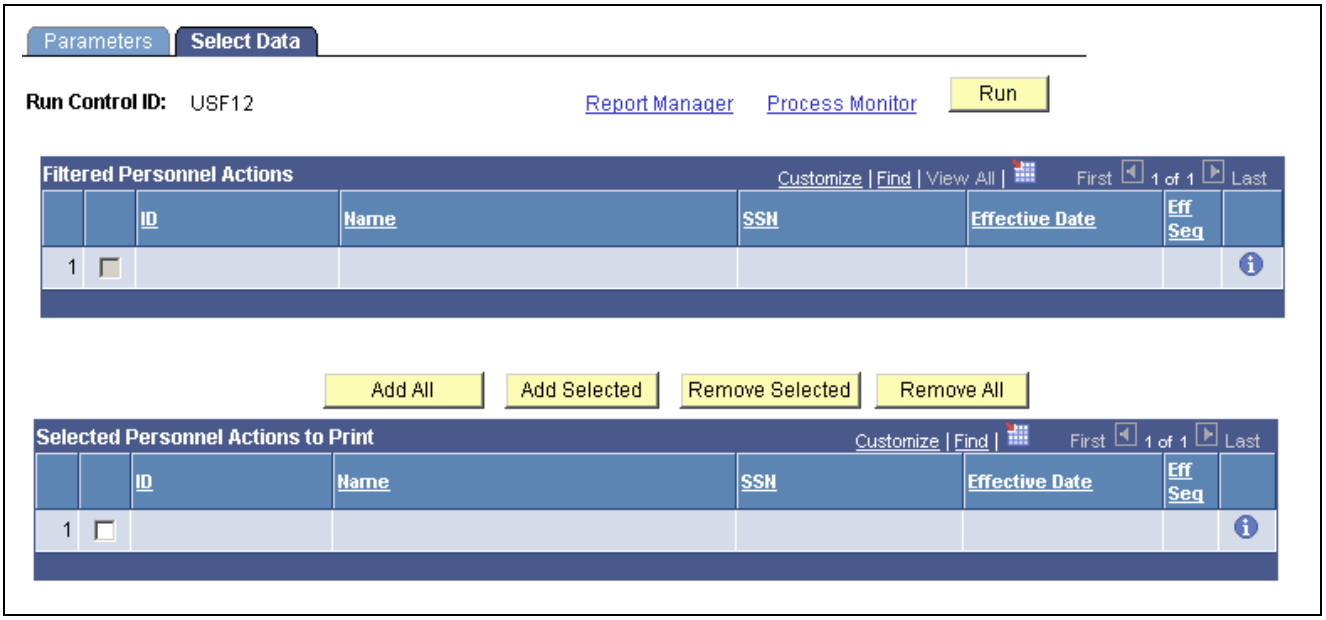
EmplID (employee ID), **SSN** (social security number), **Name, PAR Status, NOA Code** (nature of action), and **Business Unit** — Filter actions by employee ID, employee social security number, PAR status, NOA code, or business unit.

PAR Status Date Range — The following elements appear in the PAR Status Date Range group box.

PAR Status — To filter by PAR status, select a status. The Begin Date and End Date fields become available when you select a PAR status.

Filter — When you click this button, the system selects the records that match your filter criteria and displays them on the Select Data page.

Access the Notice of Personnel Action USF - Parameters page or Request Personnel Action USF - Parameters page.



Request Personnel Action USF - Select Data page

Filtered Personnel Actions — The system displays information about the PARs that it filtered based on the parameters you specified on the Parameters page. Use the check box at the beginning of each data row to select individual PARs and add them to the list of Selected PARs to Print when you click Add Selected. You can click the Add All button to add all of the PARs to the list without selecting any check boxes.

Click this button to view the values of all of the filter criteria for this PAR.

Add All — Click this button to add all PARs from the Filtered PAR Data section to the Selected PARs to Print section.

Add Selected — Click this button to add the selected PARs from the Filtered PAR Data section to the Selected PARs to Print section.

Remove Selected — Click this button to remove selected PARs from the Selected PARs to Print section.

Remove All — Click this button to remove all PARs from the Selected PARs to Print section.

Selected Personnel Actions to Print The system transfers the information for the PARs that you selected to add to the list. These PARs print when you run the report. If you want to remove any of the selected PARs, select the check box at the beginning of each data row and click the Remove Selected button. Click the Remove All button to remove all PARs.

Viewing Summary Pages

To view a summary of employee data, use the dynamic inquiry pages and display-only pages that summarize data entered in other pages throughout the system, including Job Summary, Personal Data, Job Data 1 and 2, and Employment Data pages.

See Also

Chapter 14, "Viewing Summary Workforce Information," page 381

Generate a Personnel Action History Report

This section discusses how to generate the Personnel Actions History report.

The Personnel Actions History report (FGHR017) lists all employees affected by each of the job actions you enter on the run control page. It prints the following information:

- Employee name.
- Department.
- Effective date.
- Reason for the action.

For each employee the report lists:

- Original hire date.
- Total years of service.
- Employee type.
- Regular/temporary.
- Full/part-time.
- Job code and title.
- Salary grade.
- Compensation rate associated with the action.
- Supervisor's name.

Page Used to Run the Personnel Actions History Report

Page Name	Object Name	Navigation	Usage
Action History Report	RUNCTL_FGHR017	Workforce Administration, Job Information, Reports, Personnel Actions History USF	Run the Personnel Actions History report (FGHR017).

Generating a Wage and Separation Report

Periodically, Federal agencies are required to generate a Form ES-931 report (Request for Wage and Separation Information). State agencies use the information in this report to determine benefit eligibility for each claimant filing claims for Unemployment Compensation for Federal Employees (UCFE).

The generation of the ES-931 report is a two-part process.

1. Use the Setup Wage/Separation USF component to enter setup information.
2. Use the Print Wage/Separation USF component to generate the actual report.

This section discusses how to:

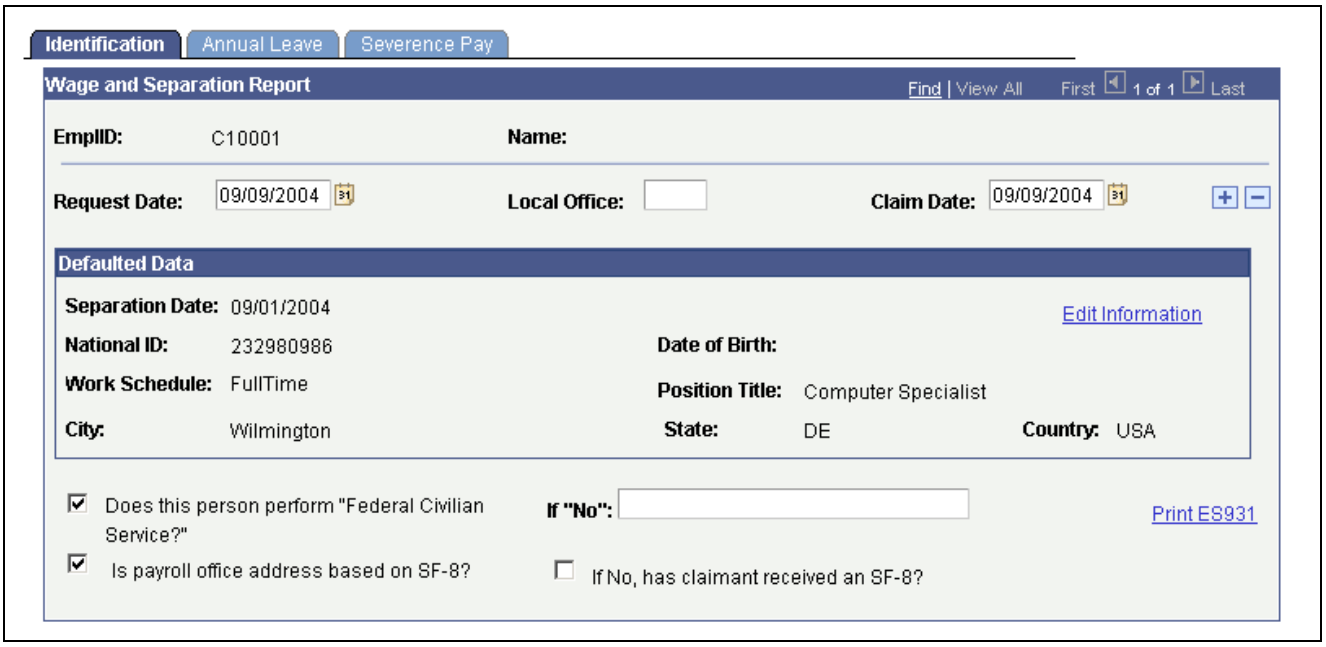
- Enter ES-931 employee identification information.
- Enter ES-931 annual leave information.
- Enter ES-931 severance pay information.
- Generate the ES-931 report.

Pages Used to Set Up and Run the ES-931 Wage and Separation Report

Page Name	Object Name	Navigation	Usage
Setup Wage/Separation USF - Identification	GVT_UCFE_PG	Workforce Administration, Job Information, Reports, Setup Wage/Separation USF, Identification	Enter ES-931 identification information for the wage and separation report. **Note.** The pages in the Setup Wage/Separation USF component pre-populate the fields for which data is already available and those pre-populated fields are inaccessible. Enter data for the remaining fields since data is required in all of the fields.
Setup Wage/Separation USF - Annual Leave	GVT_UCFE_PAY_PG	Workforce Administration, Job Information, Reports, Setup Wage/Separation USF, Annual Leave	Enter ES-931 annual leave information for the wage and separation report.
Setup Wage/Separation USF - Severance Pay	GVT_UCFE_SEV_PG	Workforce Administration, Job Information, Reports, Setup Wage/Separation USF, Severance Pay	Enter ES-931 severance pay information for the wage and separation report.
Print ES-931	GVT_PRINT_ES931	Workforce Administration, Job Information, Reports, Print Wage/Separation USF	Run the Print Wage/Separation report (ES931).

Entering ES-931 Employee Identification Information

Access the Setup Wage/Separation USF - Identification page.



Setup Wage/Separation USF - Identification page

Request Date Enter the date the information was transmitted.

Local Office Enter the numerical ID of the requesting/record holding office.

Claim Date Enter the effective date of the claim.

Print ES931 Click to access the Print Wage and Separation component.

Does this person perform "Federal Civilian Service?" Select if the employee performs Federal Civilian Service.

If No If the employee does not perform Federal Civilian Service, enter an explanation.

Is payroll office address based on SF-8? Select if the payroll office is based on an SF-8.

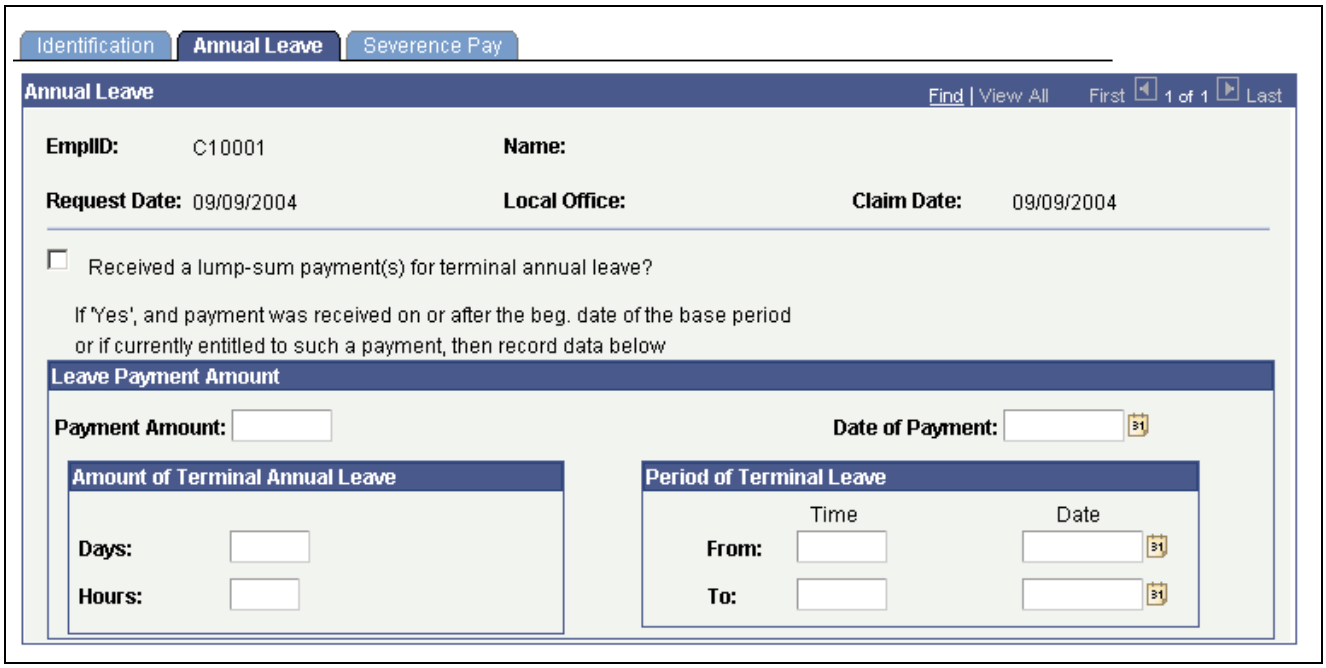
If No, has claimant received an SF-8? Select if the payroll office is not based on an SF-8.

Defaulted Data

The information in this group box is pre-populated from existing data, if that data exists. If you need to change a value in a field that was pre-populated, you can click the Edit Information link to make the fields accessible for edit.

Entering ES-931 Annual Leave Information

Access the Setup Wage/Separation USF − Annual Leave page.

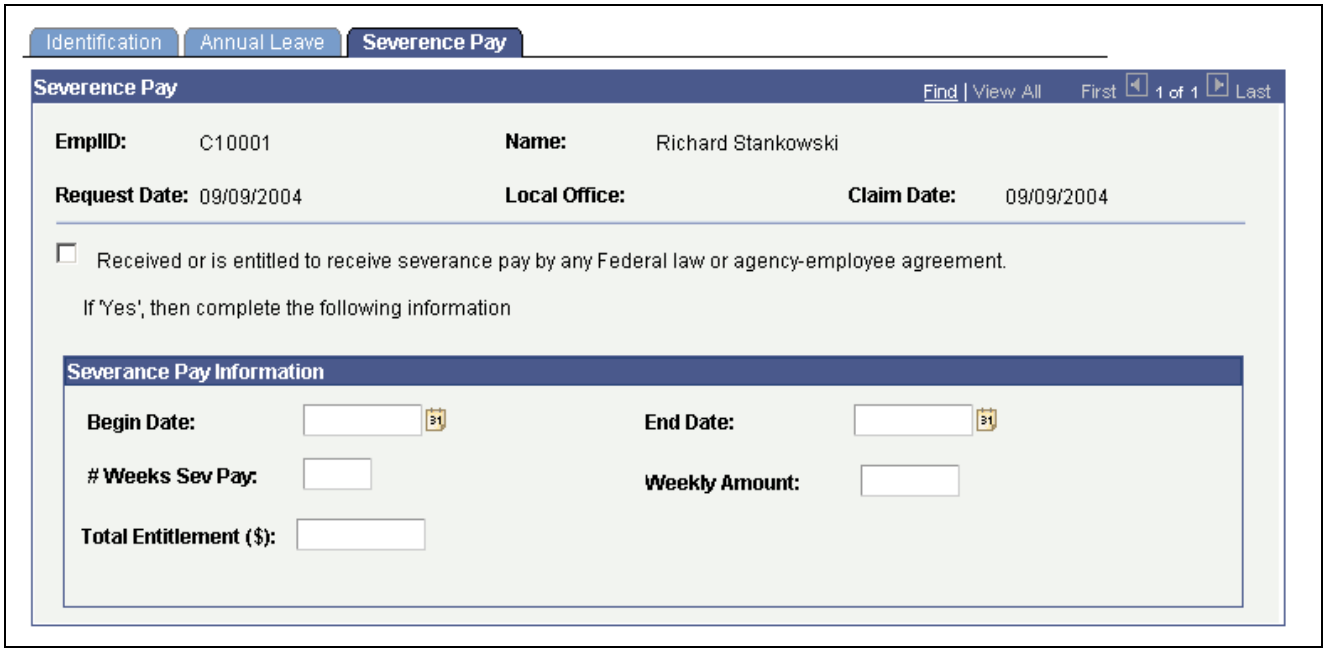


Setup Wage/Separation USF - Annual Leave page

If the employee received a lump-sum payment for terminal annual leave, select *Received a lump-sum payment(s) for terminal annual leave?*. If selected, and the payment was received on or after the beginning date of the base period, or if the employee is currently entitled to such a payment, enter the related data in the Leave Payment Amount group box.

Entering ES-931 Severance Pay Information

Access the Setup Wage/Separation USF - Severance Pay page.



Setup Wage/Separation USF - Severance Pay page

If the employee has received or is entitled to receive severance pay, select *Received or is entitled to receive severance pay by any Federal law or agency-employee agreement.* If selected, enter the related data in the Severance Pay Information group box.

Generating the ES-931 Report

Access the Print ES-931 page.

Once you have completed the necessary setup, run the Print Wage and Separation report (ES931). This prints an ES-931 Request for Wage and Separation Information report.

CHAPTER 16

(USF) Processing Personnel Action Requests

This chapter provides an overview of personnel action requests (PARs) and discusses how to perform common personnel actions.

Note. PeopleSoft delivers a database providing a sample setup of PAR data. All discussions, overviews, and examples in this book are based on the sample setup. Your agency may choose a similar setup or vary the processes to reflect its own system and operational procedures.

Understanding PARs

This section discusses:

- PARs.
- Sample setup of pages used by employees and supervisors.
- Personnel actions and employee status.
- The importance of effective dates.
- Multiple actions with the same effective date.

Personnel Action Requests

An employee's history with an agency usually involves many job changes, such as promotions, leaves of absence, layoffs, retirement, pay rate changes, awards, and so on. To maintain both current records and a complete history of employee job data, your employees, supervisors, and human resources officials will regularly submit PARs for these changes in PeopleSoft Enterprise Human Resources. (Before requesting personnel actions, verify that you've selected the Multiple Jobs Allowed check box on the Installation Table - Product Specific page.)

Note. The information you need to maintain your employees' career histories is the same type of information you enter to hire employees. Use the same pages for both.

Requests for updates you want to make to employee job data begin in the Workforce Administration, Job Information menu. Depending on whether you are an employee requesting a change for yourself, a supervisor requesting a change on behalf of someone in your department, or a human resources official, choose Employee Request, Supervisor Request, or HR Request, where the system prompts you for an employee ID. Go to the Data Control page to begin the request for a new action, and then go to other pages to enter additional information for the personnel action that you're requesting.

The differences between employee, supervisor, and human resources requests are the types of requests available and the workflow routing of the requests after being submitted. Human resources officials may request any of the actions.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Installing PeopleSoft HRMS," Setting Up Implementation Defaults

Chapter 6, "(USF) Hiring Employees," page 141

Sample Setup of Pages Used by Employees and Supervisors

The following table lists a sample setup of the pages employees and supervisors can use to enter requests and where those requests can be routed.

Request Type	Page	Submitted By	Routed To
Accounting information	Compensation	Supervisors	Authorization
Agency transfer	Job	Supervisors	Authorization
Agency/subagency	Job	Supervisors	Authorization
Appointment/expiration data	Employment 1	Supervisors	Authorization
Awards	Award Data	Supervisors	Authorization
Benefits/retirement	Job	Supervisors	Authorization
Department reassignment	Job	Supervisors	Authorization
Departmental hierarchy (view only)	Job	Supervisors	Authorization
Draft status	Personal Data	Employees/Supervisors	HR department
Earnings	Compensation	Supervisors	Authorization
Employee type	Position	Supervisors	Authorization
Expected pay (view only)	Compensation	Supervisors	Authorization
FLSA status	Position	Supervisors	Authorization
Holiday schedule	Position	Supervisors	Authorization

Request Type	Page	Submitted By	Routed To
Job code #	Job	Supervisors	Authorization
LEO position	Position	Supervisors	Authorization
Locality/LEO adjustment	Compensation	Supervisors	Authorization
Location	Job	Supervisors	Authorization
Marital status	Personal Data	Employees/supervisors	HR department
Medicare entitlement date	Personal Data	Employees/supervisors	Authorization
Military status	Personal Data	Employees/supervisors	Authorization
Name/address/birth/phone	Personal Data	Employees/supervisors	Authorization
Nonpay data	Employment 2	Supervisors	Authorization
Other pay information	Compensation	Supervisors	Authorization
PAR remarks	Data Control	Supervisors	Authorization
Pay group/frequency	Position	Supervisors	Authorization
Pay plan/table/grade/step	Compensation	Supervisors	Authorization
Permanent/RIF/tenure	Employment 2	Supervisors	Authorization
POI	Position	Supervisors	Authorization
Position #	Job	Supervisors	Authorization
Probation dates	Employment 2	Supervisors	Authorization
Quoted pay data	Compensation	Supervisors	Authorization
Reports to position	Job	Supervisors	Authorization

Request Type	Page	Submitted By	Routed To
Retained grade	Employment 2	Supervisors	Authorization
Review date	Employment 1	Supervisors	Authorization
Security info	Employment 2	Supervisors	Authorization
Service computation dates	Employment 1	Supervisors	Authorization
Service conversion dates	Employment 1	Supervisors	Authorization
SF-50/SF-52	Data Control	Supervisors	Prints reports
SF-113G ceiling	Position	Supervisors	Authorization
Shift details	Position	Supervisors	Authorization
Tax location	Job	Supervisors	Authorization
Tracking (job) data	Data Control	Supervisors	Authorization
Union information	Employment 2	Supervisors	Authorization
Veteran's Info	Personal Data	Employees/supervisors	Authorization
Within-grade-increase data	Employment 1	Supervisors	Authorization
Work schedule	Position	Supervisors	Authorization

Personnel Actions and Employee Status

When you request a personnel action to make changes to employee job data, the employee status often changes. For example, when you select *Retirement,* the employee status changes from *Active* to *Retired.* Similarly, if you terminate an employee due to death, the employee status changes from *Active* to *Deceased.* The employee status is based on either the personnel action, or in a few cases, the reason for the action, such as death. The system sets employee status as follows.

When you select the personnel action	The system sets the employee status to
Hire. Applicant hire. Rehire. Concurrent appointment. Detail assignment. End of detail. Terminate detail assignment. Return from LWOP. Return from disability (LWP). Recall from suspension/furlough. Intnl assignment.	*Active*
Leave with pay. Short-term disability. Long-term disability.	*Leave of Absence*
Paid leave of absence. Short-term disability with pay. Long-term disability with pay.	*Leave with Pay*
Retirement with pay.	*Retired with Pay*
Terminated with benefits. Terminated with pay.	*Terminated with Pay*
Furlough. Suspension.	*Suspended*
Retirement.	*Retired*
Intl assignment completion. Termination.	*Terminated*

When you select the personnel action	The system sets the employee status to
Termination (reason of death).	*Deceased*
Pay rate change. Change to lower grade. Data change. Earnings distribution change. Job reclassification. Position change. Probation. Completion of probation. Promotion Extension of NTE date. Award-monetary. Award-nonmonetary. Bonus. Reassignment/conversion. Family benefits change.	The system sets the employee status to the same status that's in the previous data row. If no previous data row exists, the system sets the status to *Active.*

When an employee status is set to *Active, Leave with Pay, Retired with Pay,* or *Terminated with Pay,* the system triggers payroll processing in PeopleSoft Enterprise Payroll and PeopleSoft Enterprise Payroll Interface.

If your agency uses PeopleSoft Enterprise Payroll for North America, payroll paysheets aren't generated for employees whose status is *Retired* or *Terminated.* You may need to pay employees for a partial pay period or for a time after they leave the agency, however, so use either the personnel action *Retired with Pay* or *Terminated with Pay* to ensure that this occurs.

A change in employee status can affect PeopleSoft Enterprise Human Resources Manage Base Benefits, PeopleSoft Enterprise Benefit Administration, and PeopleSoft Enterprise Payroll processing. Specifically for benefits, you may need to suspend coverage during a leave of absence or a suspension. In addition, a promotion or a job reclassification might affect an employee's benefit coverage.

Changes in an employee's status can also impact pension administration.

Importance of Effective Dates

You usually update employee job data in PeopleSoft Enterprise Human Resources for U.S. Federal Government by adding effective-dated data rows to the employee records. When you insert a new row on the Data Control page, the system copies the contents of the previous row into the new row so that you don't have to retype the information that stays the same. (So before you insert a new row, ensure that you're on the data row that you want to copy.) The only new information you see is the effective date, which defaults to the system date, usually today's date, which you can change.

If you want to work on the Employment 1 or 2 pages, for example, first insert a new data row on the Data Control page, and then access the appropriate Employment page to enter changes.

Effective dates enable you to maintain a complete chronological history of all your data and tables, whether you changed them two years ago or want them to go into effect in two months. With all this information at your fingertips, you can roll back your system to a particular time to analyze position data or employee records. Or you can roll forward and set up tables and data before they take effect.

The system also uses effective dates to compare pages and tables to ensure that the prompt tables list only the data that is valid as of the effective date of the page where you are working. For example, let's say you create a new department code with an effective date of May 1, 1997. If, on the Job Data pages, you enter a new data row for an employee or update an existing row that has an effective date *before* May 1, 1997, then when you select a department, you won't see the new code as a valid choice because it isn't in effect yet.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "(USF) Setting Up Human Resources Management Tables"

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "(USF) Setting Up the Work-in-Progress Management System"

Multiple Actions With the Same Effective Date

On occasion, you may need to enter more than one personnel action that takes effect on the same day. Entering two actions with the same effective date is particularly common when you need to track annual pay adjustments and career promotions that take effect on the same day. Use effective sequence numbers to combine multiple actions and specify which one to process first. On the Data Control page, enter an actual effective date and assign the action, and the system automatically assigns a transaction number/sequence for each personnel action: The first on that date as *1/1* and the second as *2/1*.

For example, an employee received a pay rate change and a promotion on the same day. As a result of this pay rate change, that employee's salary was raised by about 2.5 percent. A promotion from a GS-07 position to a GS-09 position produced an additional 7.9 percent increase in salary.

Note. The sequence number for a request is always *1* unless you are canceling or correcting a request that has already been completed and processed. In this case, the system would assign a sequence number of *2* for that action.

To enter multiple personnel actions with the same effective date:

1. Open the Data Control page for the employee whose data you're requesting to update.
2. For the first personnel action, insert a new data row.
3. Enter a new actual effective date.

   Because it is the first action processed for this actual effective date, the Transaction #/Seq # field is *1/1*.
4. Enter any other information required to implement the action, either here or in other pages in the component.
5. Change the PAR Status on the Data Control page to *Requested* so that you can continue on to enter the next action.
6. To enter the second action, such as *Promotion,* insert another data row.
7. Enter the same actual effective date as the first action.

   The system enters a Transaction#/Seq of *2/1*.
8. Continue the same steps required for the first action, entering a new action each time.

Employee Data Security Considerations

When you reassign employees from one department to another using a data row containing an effective-date sequence number, the system currently allows users with security access to the old or new department to have access to all the employee data. PeopleSoft delivers the system this way because implementing security in system views specific to the function Max (effseq) on PS_JOB would adversely affect online response time.

For example, when you reassign an employee from department one to department two and give the employee a promotion on the same day, because an effective-date sequence number is in the reassignment data row, users with access to either department one or two have access to the employee data.

If you want to modify the system to prevent this, change the security views for the PeopleSoft applications you use. Bear in mind, however, that making the change affects system performance.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Performing Common Personnel Actions

This section discusses how to:

- Enter promotional information.
- Request departmental reassignments.
- Request a leave of absence.
- Enter terminations and retirement requests.
- Request a supplemental or correction individual retirement record.
- Request terminations due to death.
- Request to rehire an employee.
- Grant performance awards.

Entering Promotional Information

When an employee changes pay grades or moves to a new job, salary changes are typically part of that personnel action.

To enter promotional information:

1. Insert a new data row on the Supervisor Request - Data Control page, and complete all fields.
2. When you are ready to submit the request, ensure that the PAR Status is *REQ*.

   The workflow system then picks up this information and routes it through the process. After that, you can still change, withdraw, or deny the information up until the point that the action has been finalized and has a status of *Processed.* To correct or cancel the request after it has been completed and has a status of *HR Processed,* go to the Cancellation or Correction pages.

   The information you change on the Data Control page and other pages varies according to the data for the former job and the new job. You usually select a new job code or a new position number by moving to the Job page. But all of the other entries on this page could also conceivably change in the event of a promotion.

Again, the information you change on the Job page may vary, but you usually select a new pay plan, table, grade, or step and enter (or generate) a new base pay.

3. Once you've completed all the changes caused by the promotion, if necessary, access other pages to enter relevant information.

   For example, access the Personal Data page to enter new business phone numbers. Or access the Position page to change the pay group or employee type, or to enter other relevant position details.

4. Change the position as necessary on the Supervisor Request - Job page.
5. Select a pay rate determinant on the Supervisor Request - Compensation page.
6. Set the options in the Within-Grade Increase Data group box on the Supervisor Request - Employment 1 page as follows:

Actions	Impact
Promotion (nature of action 702) WIGI (NOA 893) GM WIGI (NOA 891)	Sets the WIGI status to *waiting*. Sets the WIGI due date to the pay begin date, which is the first pay begin date after the employee has satisfied his or her next increase waiting period. Sets the LEI date and last increase date to the effective date of the action.
Quality step increase (QSI) (NOA 892)	Sets the WIGI status to *waiting*. Sets the WIGI due date to the pay begin date, which is the first pay begin date after the employee has satisfied his or her next increase waiting period. The WIGI due date is based on the last equivalent increase date, not the effective date of the action. Sets the last increase date to the effective date of the action. (Has no effect on the LEI Date.)
Change to lower grade (NOA 713)	Issues a warning message "Warning -- Change to Lower Grade Personnel Action may have an impact on WGI Due Date -- Adjust accordingly." Always review current or future-dated records and make manual adjustments that may be required for any change to lower grade action.
Temporary promotion (NOA 703)	Sets the WIGI status to *NA*. Sets the WIGI due date to *Blank*.

Requesting Departmental Reassignments

The description given here is for reassigning employees among departments. Agency-to-agency transfers are processed as hires and terminations.

To enter a reassignment request when a person is assigned to a new department without changing job codes:

1. Use the Data Control page to enter reassignment requests.

   Reassignments usually imply that there is no change in pay grade or compensation.
2. If this action is to occur on the same day as another action, insert an Action# in the Action#/Sequence field.
3. Enter the action of *Reassignment/Conversion.*
4. Enter the reason code, such as *Employee Request* or *Manager Request*.
5. Complete all other necessary changes, such as NOA Code and Authority (1) and (2).
6. Access the Job page to enter additional changes for the employee being reassigned.

   Change the position number, job code, agency, and any other details that will change with the employee reassignment. When you select a new department for the employee, the system automatically enters a new location and tax location if you've associated a location with the department in the Department table.
7. Access other pages to enter any other employment or job information applicable to the reassignment.

   For example, you may need to go to the Personal Data page to enter a new phone number. On the Personal Data page, click the Personal Phone Numbers button, and on the Personal Phone Numbers page, enter a new business phone number. On Employment 2, change the supervisor ID to the manager of the new department. Access other pages, such as the Position page to change the pay group, employee type, or other relevant position details.

Security Considerations

PeopleSoft Enterprise Human Resources enables users to assign employees into departments that they can't access for updates. If you want to prevent an user from reassigning an employee into a department for which they don't have access, PeopleSoft Enterprise Human Resources contains a view (DEPT_TBL_ACCESS) that displays only those department IDs that users can access based on their user security profiles.

If you choose to use this view, you must create a class of users who have access to all departments so that they can perform reassignments.

See Also

Chapter 5, "Increasing the Workforce," page 77

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Requesting Leave of Absence

At some point in their careers, many employees take leaves of absence. For example, when an employee or an employee's wife has a baby, the new parent may request a maternity or paternity leave.

To enter a leave of absence:

1. Access the Data Control page to submit a request for the employee who is temporarily leaving the agency.
2. Access the Non Pay Data page to enter leave of absence data for an employee.

   In the Last Date Worked field, enter the last date the employee worked. When you process the PAR to return the employee to pay status, you must update the other fields (SCD Hours, Probation Hours, and Career Tenure Hours), as appropriate.
3. When an employee returned from leave, return to the Data Control page to change that employee's status to *active*.

a. In the Action field, select *RFL* (return from leave without pay).

b. In the Reason Code field, select *RFL* (return from leave).

c. In the PAR Status field, select *Requested* or leave it as *Initiated* in case the return date changes for any reason.

d. Access any other pages to make needed changes.

See Also

PeopleTools 8.43 PeopleBook: PeopleSoft Process Scheduler

Entering Terminations and Retirement Requests

When employees leave the agency permanently, you render their records and their statuses inactive by registering them as *Terminated* or *Retired.* The processes for entering terminations and retirements are almost identical; the primary difference is the action you select on the Data Control page.

To enter termination and retirement requests:

1. Request a termination for an employee who has left the agency using the Data Control page.

   The Actual Effective Date field defaults to the system date, usually today's date, which you can change.

   Normally, the system uses the effective date to represent the *beginning* of an action; however, when an employee terminates or retires, the system treats the effective date you enter as the close of business of the day of the termination.

   For example, if an employee's last day of employment is September 1, the effective date is September 1 because the termination is effective at the close of business that day.

2. In the Action field, select one of the following: *Termination, Terminated with Pay, Terminated with Benefits,* or *Retirement,* and then select a reason code for the departure, if applicable.

   Depending on the action you selected, the system changes the employee status from *Active* to *Terminated, Terminated with Benefits or Pay,* or *Retired.*

3. If the employee is suitable for rehire, save this page.

   When you request a termination or retirement, the system generates an individual retirement record (IRR) control record for this employee.

Note. The IRR process is used by agencies using PeopleSoft Enterprise Payroll. Payroll detail earnings and deductions for the fiscal history are used in the IRR process.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "(USF) Generating IRR and ROST Reports," Understanding the IRR Process

Requesting a Supplemental or Correction Individual Retirement Record

After you process an employee's IRR, you may find that you need to supplement or make corrections to that IRR. This requires that you create another PAR using the Workforce Administration, Job Information, Supplement to IRR or Correct IRR Supplement menu.

When you create the new PAR, the system creates an IRR control record with an IRR type of *C* (correction) or *S* (supplemental).

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "(USF) Generating IRR and ROST Reports," Generating Supplemental or Correction IRRs

Requesting Terminations Due to Death

To request termination due to death:

1. Open the Data Control page for the deceased employee.
2. In the Action field, indicate that the employee is *Terminated.*
3. In the Reason Code field, select *Death* as the reason for termination.

   The system automatically changes the Employee Status field from *Active* to *Deceased.*

Requesting to Rehire an Employee

When you request to hire an employee who worked for your agency in the past, enter a *Rehire* action. Information on a rehired employee is already in PeopleSoft Enterprise Human Resources unless the employee data was deleted or archived. If employee records aren't in the system, follow the new hire process described in "Hiring Your Workforce."

You can rehire only employees whose employee status is *Terminated, Terminated with Pay, Terminated with Benefits, Retired,* or *Retired with Pay.* If you rehire an employee whose records already exist in the system, you may want to ensure that the personal, employment, and job data for that person is current.

If you want to rehire an employee whose previous job was in a department (organizational entity) for which you don't have security access, give at least one user performing rehires security access to all departments.

To request to rehire an employee into the system:

1. Open the Data Control page for the employee and request a rehire.
2. Access the other employee data pages to enter additional information.

Granting Performance Awards

Recognizing and rewarding employee performance is a critical component of attracting and keeping top talent. PeopleSoft Enterprise Human Resources handles the complexity of this human resource area by making it easy to establish, record, track, and grant employee awards and bonuses.

Begin the process to grant an award by submitting a request to issue a bonus or award. The data is automatically sent through the approval process, tracked, approved, recorded, and issued to the employee.

To issue an award:

1. Set up the Award Action Data page to define monetary and nonmonetary award types.
2. Request an award or bonus for your employee on the Data Control page.

   Submit your request the same as you would for other personnel actions.
3. Define the award setup using the Supervisor Request - Data Control page.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies, "Setting Up Competencies and Accomplishments"

CHAPTER 17

(USF) Processing Automatic Actions for Probation, Tenure, and WGIs

This chapter provides an overview of Automatic Action processing and discusses how to:

- Perform automatic actions.
- Administer probation termination automatic actions.
- Administer tenure conversion automatic actions.
- Administer within-grade increases (WGIs).

Understanding Automatic Action Processing

This section lists prerequisites and provides an overview of processing automatic actions.

Prerequisites

For the Automatic Actions process to work as described, you must first activate workflow and set up supervisors in the workflow process. Consult your system administrator for information.

Before you can administer automatic actions for your employees, you must have already entered them into the system using the Hire Employee, Concurrent Hire, Add Non-Employee, or Hire components in Workforce Administration.

You should designate one or more employees, perhaps from your human resources or payroll office, to administer the Automatic Actions processes. As delivered, the system sends supervisor notifications to the employee's supervisor's worklist based on WGI, tenure, and probation information already in your system. This information, most of which you entered during the hire process, initiates the automatic action processes. Run the Automatic Action processes regularly, as determined by your organization's needs. If necessary, manually change employee records to process special cases.

Before implementing Automatic Actions, decide how often your agency should run each process. For example, within-grade increases generally take effect on the first day of a pay period, so you might choose to process step increases only once per pay period. On the other hand, if supervisors review notices every Thursday morning, you should run 60-day notification processes weekly. Some agencies run the notification processes nightly to accommodate multiple supervisors and to allow for maximum time to verify upcoming employee record changes.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Delivered Workflows for PeopleSoft HRMS"

Chapter 6, "(USF) Hiring Employees," Using the PAR Process to Hire Employees, page 141

Processing Automatic Actions

Your agency's human resources personnel have many tasks to oversee: recruiting new employees, making hiring decisions, administering reviews, and tracking changes in employees' personal data, among others. Unfortunately, much of their time can be spent processing routine, tedious data. PeopleSoft Enterprise HRMS USF functionality automates some of these routine tasks, leaving your professionals free to spend time on other projects that require their professional insight and skills.

The PeopleSoft Enterprise Human Resources Administer Workforce business process offers an Automatic Actions process to administer these routine tasks:

- Probation termination.
- Tenure conversion.
- WGIs.

If you activate workflow, PeopleSoft Enterprise Human Resources alerts you of upcoming waiting period terminations or step increases and then automatically updates employee records without user intervention. After you assign supervisors to review automatic action notices, you won't forget these important dates.

The procedure is identical for all three automatic actions:

1. Run a process to identify employees with upcoming probation terminations, tenure conversions, or within-grade increases in the next 60 days.

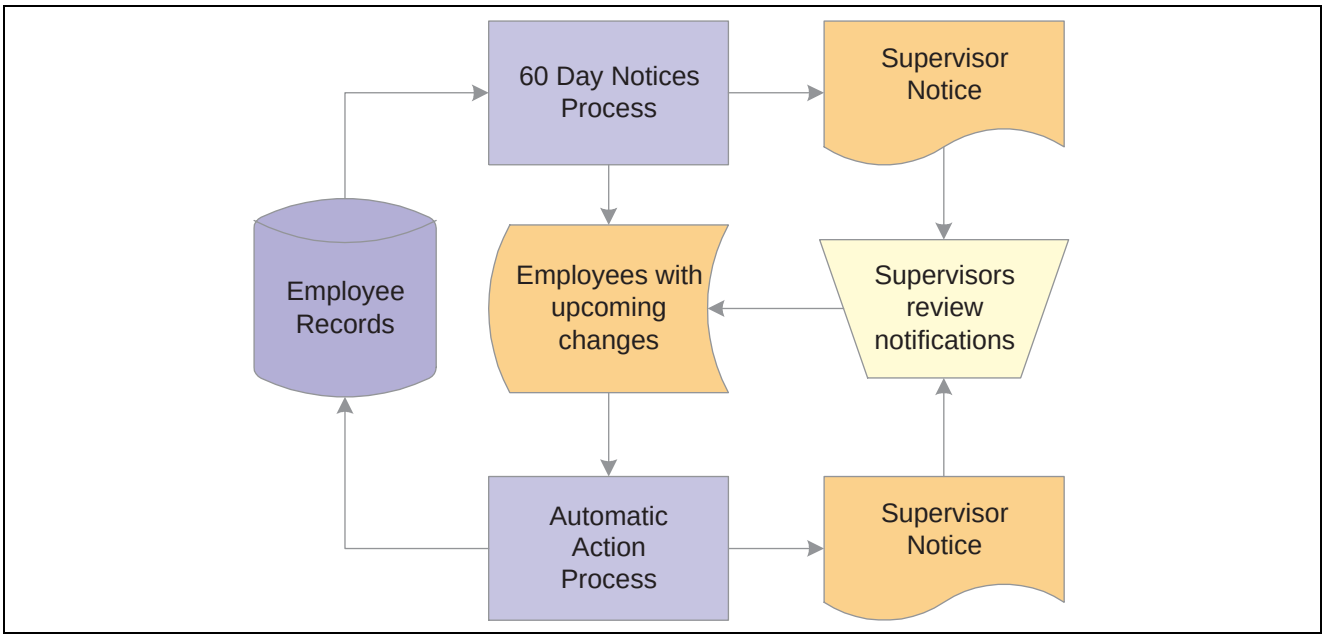
   The system creates online notifications of upcoming changes and sends them to the worklist of designated supervisors.

2. Review online notifications and make any necessary changes to employee records.

   Unless you change status or date fields in the employee's records to stop the update from occurring, the respective process updates the employee's records.

3. Run a process on the specified date to change employee records.

   This process also creates notices and sends them to supervisor worklists.



Processing Automatic Actions

Performing Automatic Actions

This section provides an overview of the menus and pages used for each Automatic Action process and discusses how to:

- Process automatic actions.
- Run the Load Within Grade Increases process.

Understanding the Menus and Pages Used for Each Automatic Action Process

The following table provides an overview of the menus and pages used for each automatic action process. However, this table does not include manual setup and verification. Run all of these processes from the Workforce Administration, Collective Processes menu.

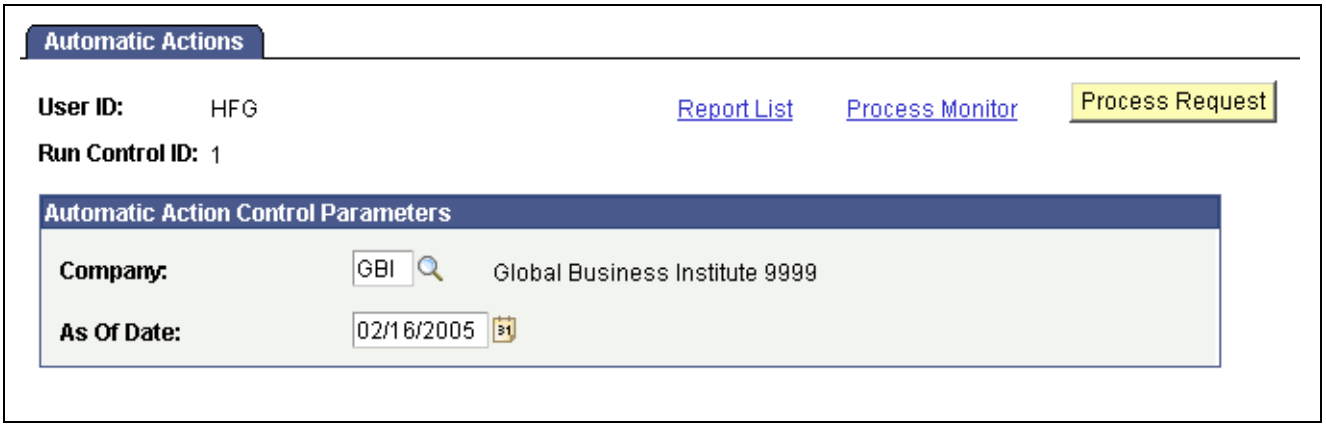
Step	Function	Navigation	Option to select in PeopleSoft Process Scheduler	Process Type and Name
1	Identify employees, create notices, and send notices to supervisor worklists.	Process Automated Actions USF	60 Day Probation Term Notices	Application Engine FGHR003A
			Or 60 Day Tenure Notices	Application Engine FGHR004A
			Or 60 Day WGI Notices	Application Engine FGHR002A
2	Update employee records and send notices to supervisor worklists.	Process Automated Actions USF	Process Probation Terminations	Application Engine FGHR003B
			Or Process Tenure Conversions	Application Engine FGHR004B
		Or Process WGI Auto Action USF	Load Within Grade Increases	Application Engine FGHR002B

Pages Used to Perform Automatic Actions

Page Name	Object Name	Navigation	Usage
Automatic Actions	RUNCTL_AUTO_ACTNS	Workforce Administration, Collective Processes, Process Automated Actions USF, Automatic Actions	Specify automatic action run control parameters for the probation termination and tenure conversion processes.
WGI Action	RUN_FGHR002B	Workforce Administration, Collective Processes, Process WGI Auto Action USF, WGI Action	Specify automatic action run control parameters for processing WGIs.
60 Day Prob Term (60 day probation term)	GVT_PROB_END_NOTE	Workforce Administration, Collective Processes, Probat Term-Supv Notif USF	View impending probationary period termination notifications online.
60 Day Ten Conv (60 day tenure conversion)	GVT_TEN_END_NOTICE	Workforce Administration, Collective Processes, Tenure Conversion Notice USF	View 60-day tenure notifications online.
WGI Notice (within-grade increase notice)	GVT_WGI_NOTICE	Workforce Administration, Collective Processes, Within Grade Incr Notice USF	View impending WGI notifications online.

Processing Automatic Actions

Access the Automatic Actions page.



Automatic Actions page

Company Enter the company for which you would like to identify employees and create notifications.

As Of Date The as of date is set by default to the system date. The process identifies all rows with a probation date within 60 days in the future from this date.

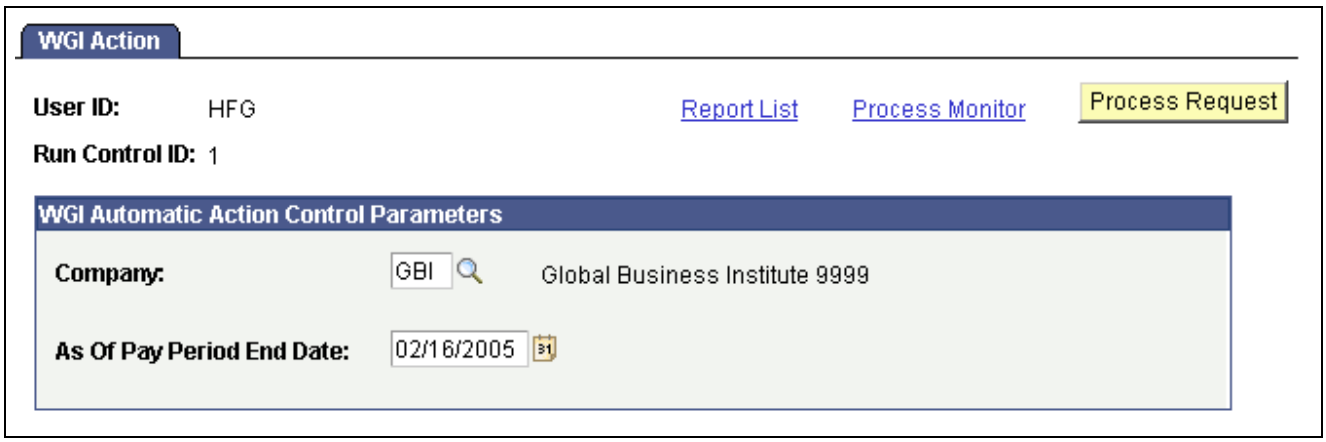
Process Request Click to run this request. PeopleSoft Process Scheduler runs the Automatic Actions process at user-defined intervals.

See Also

PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler

Running the Load Within Grade Increases Process

Access the WGI Action page.



WGI Action page

Company Enter the company for which you would like to process WGIs.

As Of Pay Period End Date This field is set by default to the system date, but you must change it to a valid pay period end date for the pay calendar you have created. The system processes within-grade increases for employees with a WGI due date before this date, usually the begin date for the same pay period. However, the system also processes WGIs due before this pay period-retroactive WGIs.

Administering Probation Termination Automatic Actions

When you first hire an employee, your agency usually imposes a probation period; most new regular federal employees have one-year probation periods. Supervisory or managerial employees and Senior Executive Service (SES) employees often have different probation periods, which you track separately.

The probation termination automatic action, like other automatic actions, identifies employees who will reach their probation termination date within 60 days. After you have activated workflow, the system sends messages to employee supervisors who are designated to process automatic actions. After the supervisors approve the probation termination, run the process to perform the actual changes to employee records, blanking out employee probation dates, indicating that they have met the probation period. Finally, you can send notices of completed probation periods to the designated supervisors' worklists.

This section discusses how to run the probation termination automatic action.

Running the Probation Termination Automatic Action

To run the probation termination automatic action:

1. Verify all of the data required for automatic probation termination processing.
    a. Verify the employee's probation waiting period (Probation Date) and the position to which the employee reports (Reports To Position) on the Employment 2 page, accessed from the HR Request menu.

       If the employee has multiple data rows, verify only the current row.

b. Verify accumulated non-pay hours that affect the employee's probation termination date on the Non Pay Data page.

2. Run the 60 Day Probation Term Notices process from the Automatic Actions page.

   During this process, the system performs the following functions:

   - Identifies employees who have a probation termination within the next 60 days, and then creates supervisor notifications. After the notices are created, the supervisor has until the probation termination date to request an extension of the probation period. The system processes the probation termination if the supervisor doesn't respond in time.
   - Adds a row to the automatic action control table (GVT_AUTO_ACTN), which records the employee ID, employee record number, automatic action type, and automatic action date.

     The system differentiates among the three probation termination types: standard, supervisor, and SES. This table also indicates whether the notification was sent to the specified worklist, whether the action was processed, and whether notification of the processed action was sent to the specified worklist.

3. Run the Process Probation Terminations process from the Automatic Actions page.

   The automatic action process updates the records of all employees previously identified in the 60 Day Probation Term Notices process unless the supervisor has extended their probation periods. The probation termination automatic action performs the following functions on the probation termination date:

   - Edits the applicable row in the automatic action control table (GVT_AUTO_ACTN) to indicate that the probation termination was processed.

     This row was created during the 60 -Day Probation Term Notices process.
   - Clears the probation date on the employee's current Employment 2 page.
   - Creates a supervisor notice indicating that the probation termination was processed.

4. View notices of upcoming probation terminations on the 60 Day Prob Term page.

   Supervisors and human resources officials can view 60-day notifications online. After viewing these online messages of impending probationary period termination, they should verify that the employee will fulfill all of your agency's requirements by the specified date. To extend the probation period, the supervisor should request a personnel action to change the probation date on the employee's Employment 2 page. If the employee's probation date isn't changed, the probation termination will occur on the date indicated.

See Also

Chapter 6, "(USF) Hiring Employees," Assigning Employees to Positions, page 176

Chapter 6, "(USF) Hiring Employees," Using the PAR Process to Hire Employees, page 141

Administering Tenure Conversion Automatic Actions

Most of your conditional and career-conditional new hires are subject to tenure conversion waiting periods. If you specify this period when you first hire the employee, the tenure conversion automatic action alerts you of upcoming tenure conversion dates and changes employee records to reflect the tenure conversion.

The tenure conversion automatic action, like other automatic actions, identifies employees who will reach their tenure conversion dates within 60 days. After you activate workflow, the system sends messages to the supervisors you have designated to process automatic actions. After the supervisors approve the tenure conversion, run the process to perform the actual changes to employee records—clearing tenure conversion dates and changing tenure types. Finally, you can send notices of tenure conversions to the designated supervisors' worklists.

This section discusses:

- Running the tenure conversion automatic action.
- Changes made to employee records during tenure conversion.

Running the Tenure Conversion Automatic Action

To run the tenure conversion automatic action:

1. Verify all of the data required for automatic tenure conversion processing.
    a. Verify the employee's service conversion dates, tenure status, and the position to which the employee reports (Reports To Position) on the Employment 2 page, accessed from the HR Request menu.
    b. Verify accumulated non-pay hours that may affect tenure conversion waiting periods on the Non Pay Data page.
2. Run the 60 Day Tenure Notices process from the Automatic Actions page.

    During this process, the system:

    - Identifies employees who will reach their tenure conversion date within 60 days, and then creates supervisor notifications.

      After the notices are created, the supervisor has until the tenure conversion date to request an extension of the waiting period. The system processes the tenure conversion if the supervisor doesn't respond.
    - Adds a row to the automatic action control table (GVT_AUTO_ACTN).

      This table records the Employee ID, Employee Record Number, automatic action type, and automatic action date. The system differentiates between the two types of tenure conversions, career and career-conditional. This row also indicates whether the notification was sent to the specified worklist, whether the action was processed, and whether notification of the processed action was sent to the specified worklist.
3. Run the Process Tenure Conversions process from the Automatic Actions page.

    In this process, the system updates records of employees previously identified in the 60 Day Tenure Notices process, unless the supervisor extended the tenure conversion date. The tenure conversion automatic action performs the following functions on the tenure conversion date:

    - Edits the applicable row in the automatic action control table (GVT_AUTO_ACTN) to indicate that the tenure conversion was processed.

      This row was created during the 60-Day Tenure Notices process.
    - Inserts an employee data row with updated or deleted tenure conversion dates and changed tenure type.
    - Creates a supervisor notice indicating that the tenure conversion was processed.
4. View notices of upcoming tenure conversions on the 60 Day Ten Conv page (60 day tenure conversion page).

Supervisors and Human Resources officials can view 60-day notifications online. After viewing online messages of impending tenure conversion, they should verify that the employee will fulfill all of your agency's requirements by the specified date. To extend the tenure conversion period, the supervisor should request a personnel action to change the date on the employee's Employment 1 page, as described previously. If they don't change the employee's tenure conversion date, the tenure conversion will occur on the date indicated.

See Also

Chapter 6, "(USF) Hiring Employees," Assigning Employees to Positions, page 176

Chapter 6, "(USF) Hiring Employees," Using the PAR Process to Hire Employees, page 141

Understanding Changes Made to Employee Records During Tenure Conversion

To understand the changes made to employee records during the Tenure Conversion process, let's look at an example of an employee's data rows.

Effective Date	NOA	Conv Begin Date	Career Conv Date	Career-Cond Conv Date	Tenure
January 1, 1999 = old Career Conv Date	880 = Change in Tenure Status				Permanent
January 1, 1996 = old Career-Cond Conv Date	880 = Change in Tenure Status	January 1, 1996 = current effective date	January 1, 1999 = Conv Begin Date + 3 years		Conditional
January 1, 1994	101 = Career Conditional Appointment	January 1, 1994		January 1, 1996	None

As the table demonstrates, the system inserts a row with an effective date equivalent to the career conversion date or career-conditional conversion date and a nature of action code *880*.

For career-conditional conversions, the system performs the following actions on the new row:

- Blanks out the career-conditional conversion date.
- Changes the conversion begin date to the effective date of the current row.
- Inserts a career conversion date three years in the future.

  You can change this date.
- Changes the tenure type from *None* to *Conditional.*

For career conversions, the system performs these actions on the new row:

- Blanks out the career conversion date.
- Blanks out the conversion begin date.

- Changes the tenure type from *Conditional* to *Permanent.*

Administering WGIs

Keeping track of WGIs for all of your agency's employees can be a time-consuming, labor-intensive process. Using workflow, which you activate and set up, PeopleSoft Enterprise Human Resources automates the entire process, from identifying upcoming step increases to updating employee records after the increase has occurred. All employees who meet minimum performance standards will receive the proper step increase and concurrent pay raise at the end of the step waiting period.

This section provides an overview of 60 day WGI notices and of the load within grade increases process and discusses:

- Running the WGI automatic action.
- Entering data that affects WGI automatic actions.

Understanding the 60 Day WGI Notices

The system identifies and differentiates among employees who have a WGI Status of *Waiting* or *Approved* and a WGI Due Date up to 60 days in the future, but do not meet all automatic WGI criteria. Employees are classified into four different WGI automatic action types.

Automatic Action Type	Explanation
Within Grade Increase	These employees receive an automatic WGI within 60 days.
Manual WGI	You need to process these employees' WGIs manually. For example, employees with intermittent or seasonal work schedules require manual WGI processing.
Retroactive WGI	These employees have a WGI status of *Waiting,* but were due a WGI in a previous pay period.
WGI W/O Min. Performance	These employees have an overall review rating below *Satisfactory* or do not have a review within the last fifteen months.

Different supervisor notifications are sent for each of these types. However, the system processes WGIs automatically for only the first and third types listed previously, Within Grade Increase and Retroactive WGI.

Understanding the Load Within Grade Increases Process

To understand the within-grade increase automatic action, consider what happens to an employee with this current row:

Effective Date	NOA	Step	WGI Due Date	WGI Status	Last Increase Date	LEI Date
January 1, 2001	Any	1	May 18, 2001	Waiting		

In March, the notification process identified this employee's upcoming WGI, after which you sent a notification to the supervisor. The supervisor approved the increase and didn't need to change any data.

On May 18, 2001, the WGI due date, the system processes this employee's within-grade increase. It changes the WGI Status in the old row and inserts a new row as follows:

Effective Date	NOA	Step	WGI Due Date	WGI Status	Last Increase Date	LEI Date
May 18, 2001 = old WGI due date	893 = WGI	2	Pay period begin date after Step 2 waiting period	Waiting	May 18, 2001 =old WGI due date	May 18, 2001 =old WGI due date
January 1, 2001	Any	1	May 18, 2001	Created		

As you can see, the system performs six actions during the within-grade increase process:

- Changes the WGI Status to *Created* in the row that was current when the WGI process occurred.

  If the employee has multiple rows with the same WGI due date, the system changes the status of all the rows to *Created.* Only the system enters a status of *Created.*
- Inserts a new row with nature of action code *893* and effective date equal to the old WGI due date.
- Increments the step by one in the new row, and updates step-dependent pay information.
- Calculates the WGI due date for the new row.

  This date corresponds to the beginning of the pay period following the waiting period for the new step.
- Sets the WGI status on the new row to *Waiting.*
- Sets both the last increase date and LEI date on the new row to the old WGI due date.

WGI increases take effect only at the beginning of a pay period. If the WGI due date is the beginning of a pay period, the pay increase occurs on that date—the employee receives the increased pay for the entire period. However, if the WGI due date falls between the beginning and ending dates of a pay period, the pay increase takes effect at the beginning of the following pay period.

In addition to changing employee records, the system edits the applicable row in the Automatic Action Control table (GVT_AUTO_ACTN) to indicate that the WGI was processed. It also creates a notice indicating that the WGI was processed.

Running the WGI Automatic Action

To process automatic within-grade increases:

1. Verify all of the data required for automatic WGI processing.

   To enable the system to run WGI automatic actions, you must first set up required position and employee data. You may have already entered the necessary information when hiring the employee. Now, verify information throughout your PeopleSoft Enterprise Human Resources system, at both the table level and the employee level. If the employee has multiple data rows, you only need to verify the current row. All of the following conditions must be met for the system to process an automatic within-grade increase:

   a. Selected the Pay Plan is Eligible for Auto Within Grade Increase check box on the Pay Plan Table page.

   b. Defined pay calendars for the current year plus the next three years on the Pay Calendar Table page.

   c. Ensured each step has a next step increment value in the Weeks column on the Salary Step Table page.

   d. Set the overall review rating to *Satisfactory* or better within last 15 months on the Employee Appraisal 1 page.

   e. Selected a work schedule of *Full Time, Baylor Plan,* or *Part Time* on the Position page.

   f. Set WGI status to *Waiting* or *Approved* on the Employment 1 page.

   g. Ensured that the Reports To Position field contains a valid entry on the Employment 2 page.

   h. Verified that the step isn't the highest in grade on the Compensation Data page.

   Note. If you are using the Manage Positions business process, the Report To Position field on the Employment 2 page is unavailable for data entry. To edit the field, select the Position Override check box on the Position Data page and change the position this employee reports to. You can also identify the reports to position on the Position Data – Description page. To do this, select Organizational Development, Position Management, Maintain Positions/Budgets, Update Position Info.

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2. Run the 60 Day WGI Notices process from the Automatic Actions page.

   This process identifies employees with a WGI due date within the next 60 days and a WGI status of *Waiting* or *Approved.* The system:

   - Adds a row to the automatic action control table (GVT_AUTO_ACTN).

     This table records the employee ID, employee record number, automatic action type, and automatic action date. This table also indicates whether the notification was sent to the specified worklist, whether the action was processed, and whether notification of the processed action was sent to the specified worklist.

   - Identifies employees who will receive a within-grade increase within 60 days and creates supervisor notifications.

     After the notices are created, the supervisor has until the WGI due date to deny or postpone the increase. If the supervisor doesn't respond, the system processes the step increase. To prevent the automatic within-grade increase from occurring, the supervisor must change the WGI status to *Denied, Postponed,* or *N/A* on the current row and insert a new row with the new WGI due date and WGI status of *Waiting* or *Approved.* The system also creates notices for employees who have a condition preventing automatic WGI processing.

   - Changes the WGI status on the employees' current Employment 1 pages to *Approved,* if the employees meet all of the WGI criteria.

   - Sends upcoming WGI notices to supervisor worklists.

3. Run the Load Within Grade Increases process from the WGI Action page.

In this process, the system updates records of employees previously identified in the 60-Day WGI Notices process, unless you have denied or postponed their increases.

4. View notices of upcoming WGIs on the WGI Notice page.

   After viewing these online messages of impending WGI due dates, verify that the employee will fulfill all of your agency's requirements by the specified date. To prevent the WGI from occurring, you must change the employee's WGI status to *Denied, Postponed,* or *N/A* on the current Employment 1 page. Also, insert a new row with an updated WGI due date and WGI status of *Waiting.* You can also view notices for employees who do not receive automatic WGIs or for whom you must manually process a WGI.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "(USF) Setting Up Additional U.S. Federal Payroll Functionality," Establishing Pay Plans

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up Pay Calendars," Creating Pay Calendars and FLSA Calendars

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting, "Setting Up Base Compensation and Budgeting," Setting Up Salary Plans, Grades, and Steps

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Employee Reviews, "Managing Employee Reviews"

Chapter 6, "(USF) Hiring Employees," page 141

Entering Data That Affects WGI Automatic Actions

Because the automatic WGI process obtains information from many pages, be aware of entering information that might affect some of the data the system uses.

- Creating a PAR for a Change to a Lower Grade.

  When you create a PAR with nature of action code *713*, the system updates the WGI due date to reflect the change. However, the change may affect the WGI due date and status in many ways. You need to verify that the information entered is correct for your specific circumstances. To remind you, the system displays a warning message.

- Changing the WGI due date.

  When you change the WGI due date, the system checks that the date you entered is the beginning of a pay period. If it isn't, it issues a warning message.

- Based on the WGI due date you entered, the system suggests the beginning of the pay period in which your date falls and the beginning of the next pay period.

  You can enter one of these or keep your original date. If you decide to keep the date you've entered, the WGI process still identifies this employee as eligible for a step increase. However, if you enter a WGI due date in the middle of a pay period, the pay increase takes effect only at the beginning of the following pay period.

- Adding historical rows.

  When you insert a row with an effective date earlier than an automatic WGI that has already occurred, the system assigns a WGI status of *Waiting.* You probably do not want the system to process this row in an automatic WGI and should change the WGI status to *N/A.* Depending on the nature of action, you might need to check other information, for example step, on this and subsequent pages.

- Inserting a row with an effective date equivalent to the current WGI due date.

The system processes the WGI after all other actions with the same effective date. It increments the sequence number of the WGI row it adds.

CHAPTER 18

(USF) Managing Leave

This chapter provides an overview of leave administration and discusses how to:

- Administer automatic leave enrollment.
- Set up leave transfer programs.
- Administer leave donations.
- Administer leave recipients.
- View leave transfer data.
- Report on leave transfer programs.

Understanding Leave Administration

This section lists prerequisites and discusses:

- Automatic leave enrollment administration.
- Leave transfer management.

Prerequisites

Set up Earnings codes and Earnings Accrual Classes.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Defining Earnings Codes and Earnings Programs"

Automatic Leave Enrollment Administration

Use automatic leave enrollment functionality to enroll an employee automatically in an earnings accrual class with personnel action request (PAR) activity or approval to participate in a leave program. The system automatically populates the employee's leave enrollment record with default enrollment values based on the leave class rules you set up. You can manually override the defaults.

Here are the steps in administering automatic leave enrollment:

1. Set up the Leave Class Rules template (one-time set up).
2. Set up Leave Class Rule criteria (one-time set up).
3. Process PAR activity or approval to participate in a leave program.
4. Run the Auto Leave Enrollment process.

5. Review the results of the Auto Leave Enrollment process.
6. Adjust enrollments as necessary.

Leave Transfer Management

Each Federal Government agency may establish and administer procedures to permit the voluntary transfer of annual leave between Federal Government employees in a time of crisis. A crisis can be a personal medical emergency or a situation deemed as an emergency of the agency.

There are three types of programs in which employees may donate or receive annual leave hours. These programs have similar but slightly different eligibility or usage rules. Employees may participate in more than one program.

Voluntary Leave Transfer Program (VLTP)	Employees donate and receive annual leave hours directly from each other.
Emergency Leave Transfer Program (ELTP)	Employees donate and receive hours through an agency-managed emergency bank that has been created to deal with a specific emergency.
Leave Bank	Employees donate and receive hours through an agency-managed leave bank.

Administering Automatic Leave Enrollment

This section discusses how to:

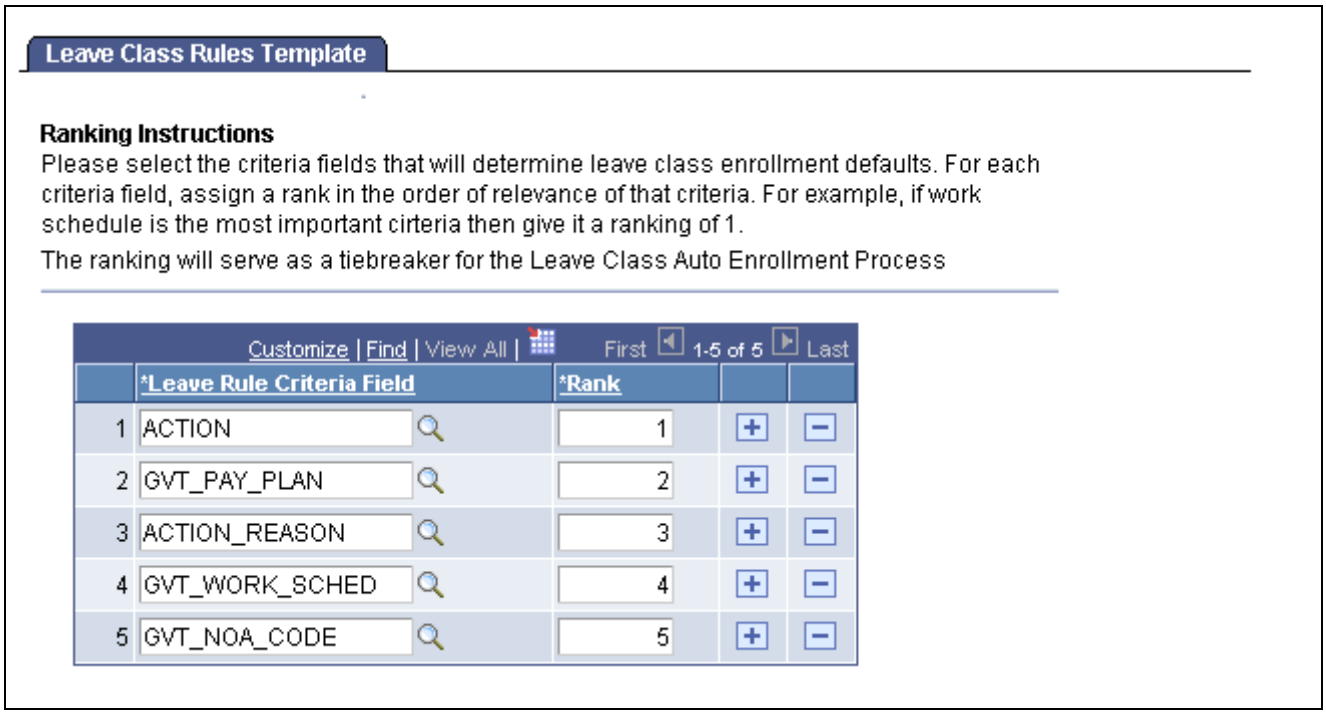
- Set up the leave class rules template.
- Set up leave class rules criteria.
- Process automatic leave enrollment.
- Review automatic leave enrollment.
- Manually enter and adjust leave enrollment.

Pages Used to Administer Automatic Leave Enrollment

Page Name	Object Name	Navigation	Usage
Leave Class Rules Template	GVT_LVCLSRUL_TMPLT	Set Up HRMS, Product Related, Workforce Administration, Absence, Leave Class Rules Criteria USF	Rank five rules criteria for the purpose of breaking ties if an employee qualifies under more than one leave class rule.
Leave Class Rules	GVT_LV_CLS_RULES	Set Up HRMS, Product Related, Workforce Administration, Absence, Leave Class Rules USF	Define your organization's rules for enrolling or terminating an employee from an earnings (leave) accrual class.
Automatic Leave Enrollment	RUNCTL_FGASOFDT	Workforce Administration, Leave Administration USF, Manage Leave Information, Request Auto Leave Enrollment	Run the process that automatically enrolls employees in earnings accrual classes based on the PAR or leave program activity and the leave class rules.
Leave Class Auto Entry Audit	GVT_LVCLS_TRGR	Workforce Administration, Leave Administration USF, Manage Leave Information, Track Auto Leave Enrollment	Review the results of the Leave Class Auto Enrollment process.
Employee Accruals	GVT_ACCR_PLAN	Workforce Administration, Leave Administration USF, Manage Leave Information, Employee Accruals Enrollment	Adjust employee enrollment in earnings accrual classes if there is a reason to override the automatic enrollment. If your organization does not use the automatic leave enrollment process, use this page to enroll employees in accrual classes.

Setting Up the Leave Class Rules Template

Access the Leave Class Rules Template page.



Leave Class Rules Template page

Set up the Leave Class Rules template only once.

Leave Rule Criteria Field Select the PAR criteria and rank them on this page. These criteria correspond to the PAR Criteria fields on the GVT Leave Class Rules page, where you select values for each criterion. The criteria that you select and rank are:

ACTION: action

ACTION_REASON: action/reason.

GVT_NOA_CODE: nature of action code.

GVT_PAY_PLAN: pay plan.

GVT_TYPE_OF_APPT: type of appointment.

GVT_WORK_SCHED: work schedule.

Rank Rank each criterion in order from 1 to 5, with 1 being the highest rank. The single rule where the employee transaction meets the highest-ranking criteria is the rule the system uses as a tiebreaker if an employee qualifies under more than one rule.

Example of Tie Breaking

The following example illustrates how the system uses ranking to resolve situations where the employee qualifies under two different Leave Class Criteria rules.

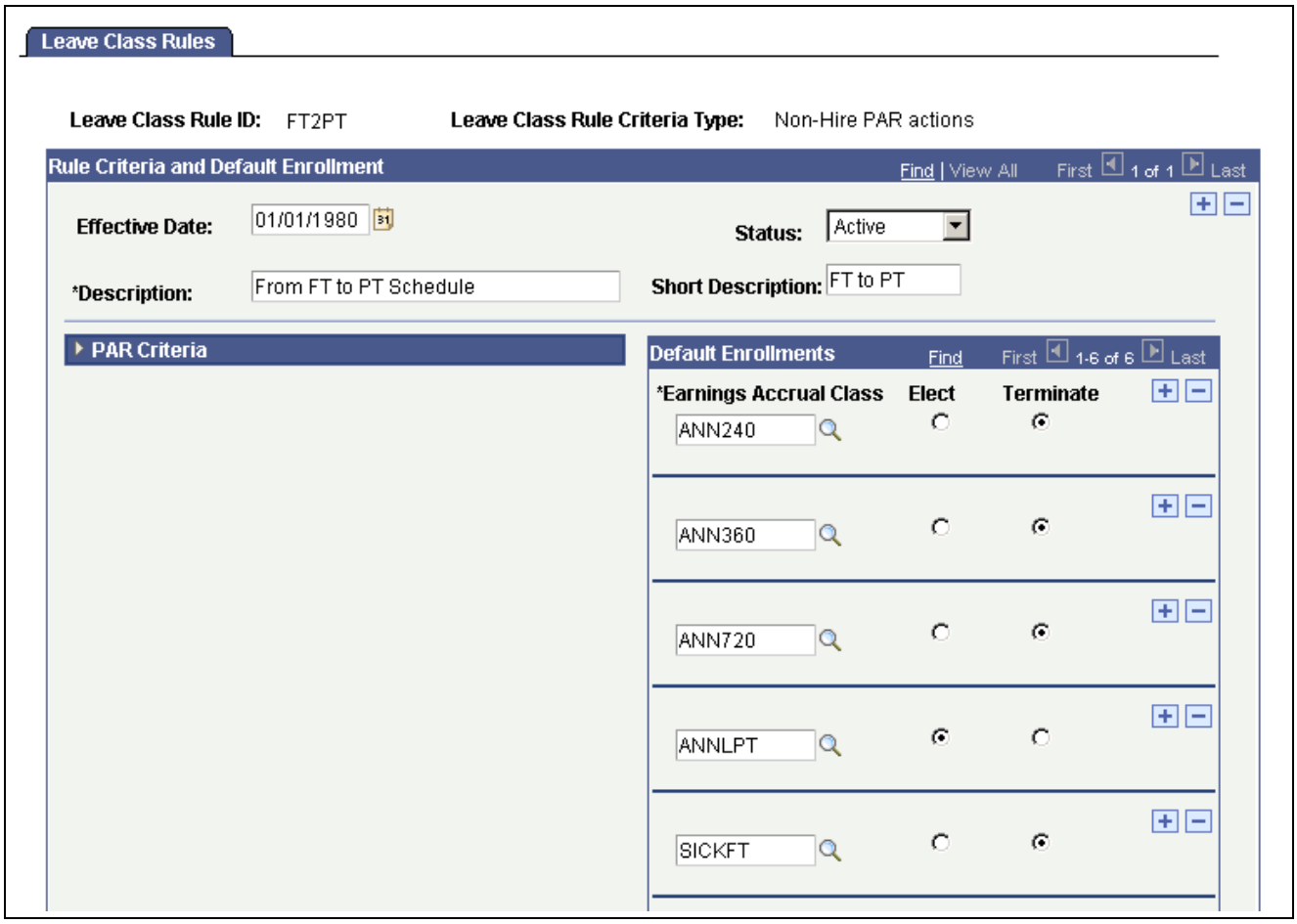
Rule 1 Definitions	Rule 2 Definitions
PAR Criteria: Action: HIR Work Schedule: Full-time Pay Plan: GS	PAR Criteria: Action: HIR Work Schedule: Full-time NOA code: 170
Default Enrollments: Annual Leave Sick Leave	Default Enrollments: Annual Leave Sick Leave Home Leave

The employee meets all criteria for both rules. The Action and Work Schedule criteria are the same in both rules.

- If pay plan is ranked higher than NOA code on the Leave Class Rules template, the system uses the first rule to enroll the employee in leave classes.
- If NOA code is ranked higher than pay plan on the Leave Class Rules template, the system uses the second rule to enroll the employee in leave classes.

Setting Up Leave Class Rule Criteria

Access the Leave Class Rules page.



Leave Class Rules page

Note. You do not need to set up a Leave Class Rule for terminating employees. The PeopleSoft Enterprise Payroll for North America Final Check Process requires that the employee stay enrolled to determine how much pay they are eligible for upon their separation. Once an employee has *Terminated* status, normal payroll calculations in PeopleSoft Enterprise Payroll for North America no longer process that employee.

Leave Class Rule ID Identify each leave class rule you create.

Leave Class Rule Criteria Type Assign a type to each new rule when you first enter the page. This value determines which additional fields are available on the page. Values are:

Hire/Rehire: for rules associated with hire or rehire actions.

Leave Program Status: for rules associated with leave bank and transfer processing.

Non-Hire PAR actions: for rules associated with PAR actions that are not hire or rehire.

The value you select in the Leave Class Rule Criteria Type field affects which group boxes appear on the page.

Leave Class Rule Criteria Type	Group Boxes
Hire/Rehire or *Non-Hire PAR actions*	PAR Criteria Default Enrollments
Leave Program Status	Leave Program Default Enrollments

PAR Criteria

Only the criteria you selected and ranked on the Leave Class template appear in this group box. Select a value for a criterion if you want to process leave enrollment based on a designated value for that criterion under this rule. The system processes enrollments based on the value of this field in the employee's PAR transaction.

Default Enrollments

Earnings Accrual Class Select the earnings accrual classes that apply to this rule.

Elect Select to enroll employees in the earnings accrual class by this rule's criteria.

Terminate Select to terminate employees from the earnings accrual class by this rule's criteria.

Leave Program

Leave Program Type If an employee has been approved as a recipient of one of the leave transfer programs, you can define which accruals to enroll or terminate. Select the type of leave transfer program *Bank, Emergency,* or *Voluntary.*

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "(USF) Setting Up Additional U.S. Federal Payroll Functionality," Defining Earnings Accrual Classes

Chapter 18, "(USF) Managing Leave," Administering Leave Donations, page 454

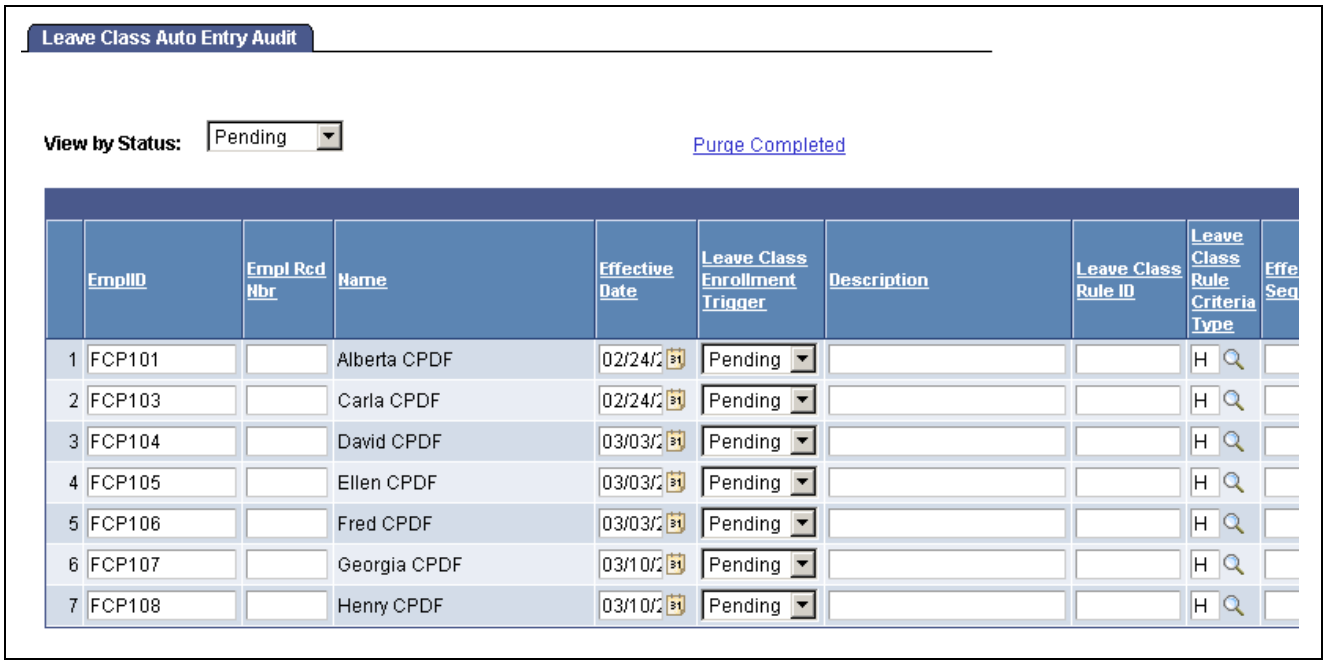
Processing Auto Leave Enrollment

After you set up the Leave Class Rules template and the Leave Class Rule Criteria, you process any hire, PAR transaction, or leave program approval as you normally would through the Workforce Administration, Job Information menu.

When you are ready to enroll employees in earnings accrual classes, access the Automatic Leave Enrollment page. *As Of Date* is the run parameter. The Leave Class Auto Enrollment process (FGHR036) compares the PAR transactions and leave program approval against the leave class rule criteria and enrolls employees in the appropriate earnings accrual classes. You can set this process to run automatically or on demand.

Reviewing Auto Leave Enrollment

Access the Leave Class Auto Entry Audit page.



Leave Class Auto Entry Audit page

Note. Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

Use this page to view the outcome of each transaction that was processed by the Leave Class Auto Enrollment process.

View by Status Select a value to sort the data by status (Leave Class Enrollment Trigger). Values are: *Completed, Error,* or *Pending.*

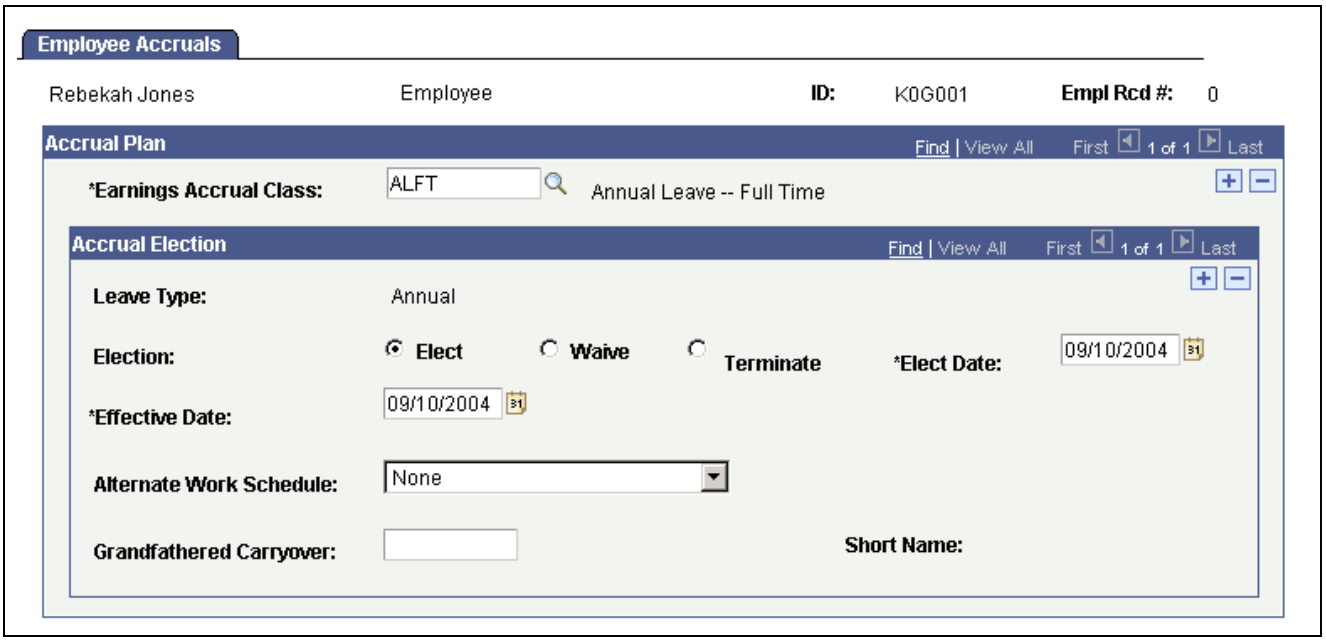
The system records employees on this table with the status of *Pending* as soon as a PAR action is completed or the employee is approved into a leave program.

The status changes to *Completed* when the auto enrollment process is complete.

Purge Completed Click to delete all data rows with the status (Leave Class Enrollment Trigger) of *Completed.*

Manually Entering or Adjusting Leave Enrollment

Access the Employee Accruals page.



Employee Accruals page

Accrual Plan

Earnings Accrual Class Select an earnings accruals class. The classes you created on the Earnings Accruals Class table are displayed.

Accrual Election

Leave Type The leave type defaults from the accrual calculation box on the Earnings Accruals − Class Page.

Election Select the enrollment status.

Select *Elect* to enroll the employee in a class

Select *Waive* to waive a leave just like a regular benefit.

Select *Terminate* to end the employee's enrollment in a class.

Elect Date Enter the date on which the accrual election change occurs.

Effective Date Select a date to specify when this accrual election becomes effective and the employee will be in the new earnings accrual class.

Alternate Work Schedule The purpose of the alternate work schedule is for those employees on the Credit Leave Accrual. When the employee's work schedule changes, the system creates an additional pay record for them to pay out their current balance.

Grandfathered Carryover Enter the grandfathered carryover here, if applicable. A grandfathered carryover is when an employee has a balance greater than the new earnings accrual-ceiling amount. For example, an employee who carried an annual leave balance of 360 hours in a previous class can transfer to a new class that has a ceiling of 240 hours. The difference of 120 hours between the new ceiling amount and the current balance of 360 is called the *Grandfathered Carryover.*

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "(USF) Setting Up Additional U.S. Federal Payroll Functionality," Defining Earnings Accrual Classes

Setting Up Leave Transfer Programs

To set up leave transfer programs, use the Denial Code (GVT_DENIAL_CD_TBL), Leave Program Type Table (GVT_LV_XFR_TYP_TBL), Leave Bank Details (GVT_LV_BANKMEM_SEC), and Emergency Leave Transfer Details (GVT_LV_DON_TGT_SEC) components.

To set up leave transfer programs, you must define the programs and the earnings codes and accrual classes used for processing.

This section discusses how to:

- Set up denial codes and denial notification letter text.
- Set up leave transfer programs.
- Set up earnings codes for leave transfer.
- Set up earnings accrual classes for leave transfer.
- Set up leave class rules for leave transfer.

Pages Used to Set Up Leave Transfers

Page Name	Object Name	Navigation	Usage
Denial Code	GVT_DENIAL_CD_TBL	Set Up HRMS, Product Related, Workforce Administration, Absence, Leave Denial Codes USF	Set up denial reasons and specify the text to be printed in denial notifications.
Leave Program Type Table	GVT_LV_XFR_TYP_TBL	Set Up HRMS, Product Related, Workforce Administration, Absence, Leave Transfer Type USF	Set up leave transfer programs, specify the program type, and indicate limits on donations and balances.
Leave Bank Details	GVT_LV_BANKMEM_SEC	Click the Leave Bank Details button on the Leave Program Type Table page	Enter Leave Bank board members.
Emergency Leave Transfer Details	GVT_LV_DON_TGT_SEC	Click the Emergency Leave Transfer Dt (emergency leave transfer details) button on the Leave Program Type Table page	Enter the number of donation hours targeted.

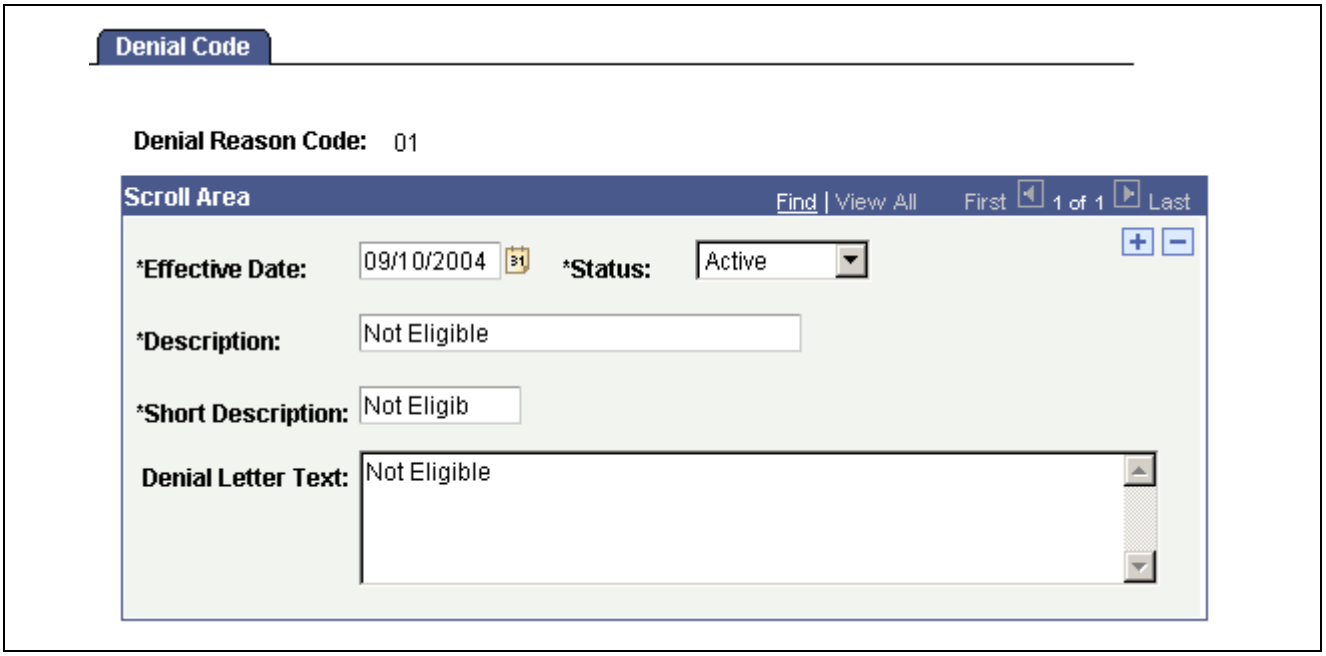
See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "(USF) Setting Up Additional U.S. Federal Payroll Functionality," Defining Earnings Accrual Classes

Chapter 18, "(USF) Managing Leave," Setting Up Leave Class Rule Criteria, page 443

Setting Up Denial Codes and Denial Notification Letter Text

Access the Denial Code page.

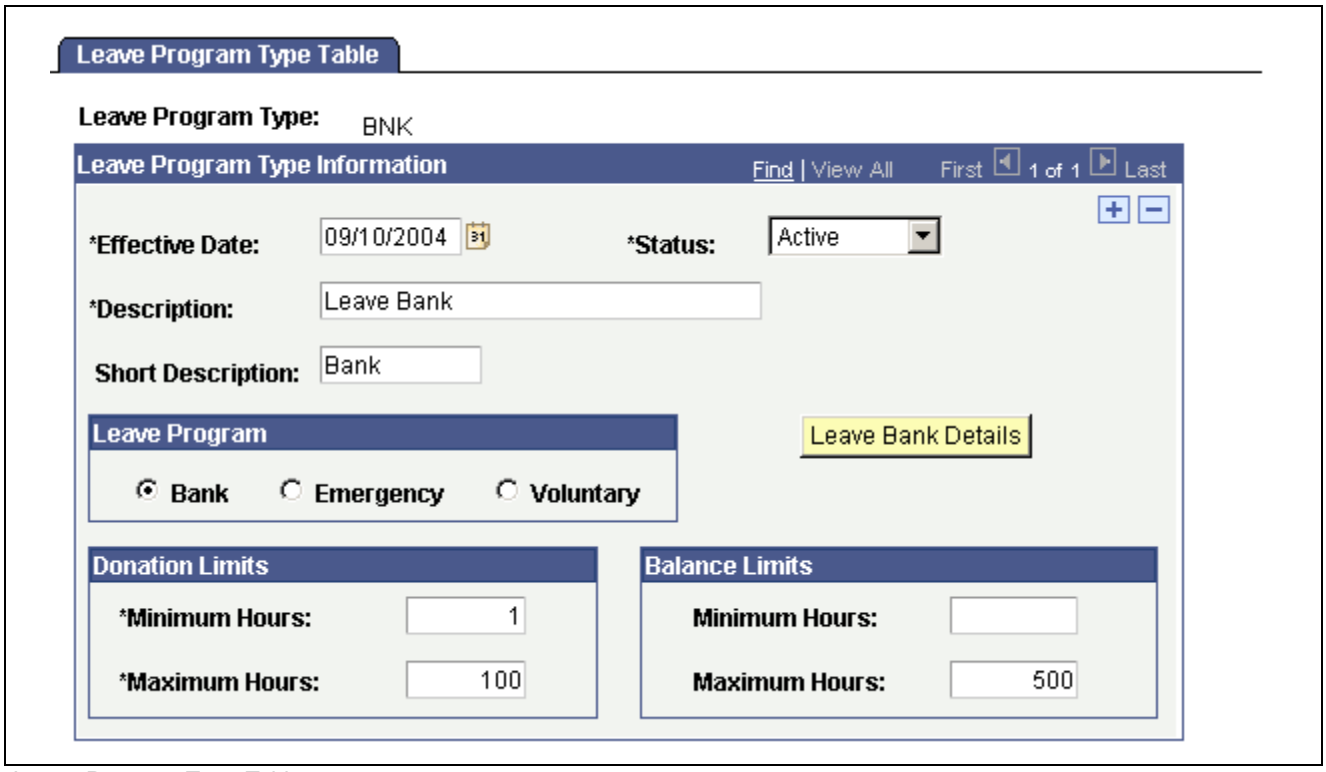


Denial Code page

Denial Letter Text Enter details of the reason for denial that you want to be printed on the Leave Denial Notifications report (FGPY031).

Setting Up Leave Transfer Programs

Access the Leave Program Type Table page.



Leave Program Type Table page

Leave Program Type Information

Leave Program Type — Define your leave program codes.

Leave Program — Select the type of leave transfer program (Bank, Emergency, Voluntary) to associate with this Leave Program Type code.

Donation Limits and **Balance Limits** — Enter the Minimum Hours and Maximum Hours allowable for donations and balances.

Leave Bank Details — Click to access the Leave Bank Details page and enter the Leave Bank board members and indicate those who are labor representatives. If you select *Bank* in the Leave Program group box, the system adds the Leave Bank Details button to the page when you save.

Emergency Leave Transfer Dt (emergency leave transfer details) — Click to access the Emergency Leave Transfer Details page and record the number of donation target hours. If the Leave Program Type is *Emergency,* the system adds the Emergency Leave Transfer Details button to the page when you save.

Setting Up Earnings Codes for Leave Transfer

Set up three unique earnings codes for three distinct purposes:

- For donors to donate leave to transfer programs.
- For recipients to receive (accrue) leave from transfer programs.
- For recipients to use leave accrued from transfer programs.

Leave Earning Type

PeopleSoft provides five Leave Earning Type codes as translate values. Associate these types with earnings codes that you set up for processing leave transfers. The type code you select defines the function of the earnings code within the leave bank and transfer program. The following table summarizes the processing that is triggered by these codes.

Leave Earn Type	Leave Bank and Transfer Process	Earning Accrual Process
Donate to Bank	Updates the donor's Additional Pay page with the hours contributed to a Leave Bank Program. Use the Leave Bank Application page to enter requests. Updates Leave Bank Ledger inquiry page with hours contributed.	Donor's Annual: • Increase Hours Taken YTD • Reduce Balance YTD
Donate to Emergency	Updates the donor's Additional Pay page with the hours contributed to an Emergency Leave Transfer Program (ELTP). Use the Leave Bank Application page to enter requests. Updates the Leave Ledger with hours contributed.	Donor's Annual: • Increase Hours Taken YTD • Reduce Balance YTD
Donate to Recipient	Updates the donor's Additional Pay page with the hours contributed in the Voluntary Leave Transfer Program (VLTP). Use the Donor Contribution page to enter requests. Updates the Leave Donation Tracking page.	Donor's Annual: • Increase Hours Taken YTD • Reduce Balance YTD

Leave Earn Type	Leave Bank and Transfer Process	Earning Accrual Process
Received from Bank	Updates the recipient's Additional Pay page with the hours received from the Bank or ELTP. Use the Leave Recipient Info page to enter requests. Updates Leave Ledgers with hours withdrawn.	Leave Program Recipient: Increase Balance YTD
Received from Donor	Updates the recipient's Additional Pay page with the hours received through the VLTP. Use the Leave Recipient Info page to enter requests.	Leave Program Recipient: Increase Balance YTD

Setting Up Earnings Codes for Donors and Recipient Accruals

Use the Earnings Table component to set up earnings codes for donors and recipient accruals. You must use the specified values for the following fields:

- General page: In the Payment Type field, select *Hours Only.* Leave transfer earnings codes process hours only; there are no earnings or deductions associated.
- Taxes page: There are no taxes taken. In the Earning Allocation group box, select *Maintain Earnings Balances.*
- Federal Additional Earnings page: In the Leave Bank and Transfer Type group box, select the appropriate Leave Earnings Type.
- Calculation Page: The Multiplication Factor must be 0.0000 to ensure no earnings.

Setting Up an Earnings Code for Recipients to Use Transferred Leave

Use the Earnings Table component to set up earnings codes for recipients to use transferred leave. You must use the specified values for the following fields:

- General page: In the Payment Type field, select *Hours Only*.
- Taxes page: The earnings are fully taxable. In the Earning Allocation group box, select Add to Gross, Maintain Earnings Balances, and Hours Only.
- Calculation Page: The Multiplication Factor must be 1.0000 to ensure the earning is paid at the regular hourly rate.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Defining Earnings Codes and Earnings Programs"

Setting Up Earnings Accrual Classes for Leave Transfer

Set up earning accrual classes for the following purposes:

- Leave program recipient.

  Once an employee is approved as a recipient in either a Bank, ELTP, or VLTP, they must be enrolled into an Earning Accrual Class to track hours received and used during their program participation.

- Deferred Annual/Sick Leave.

  When an employee is participating in either an Agency Bank or VLTP, they must terminate their enrollment from regular annual and sick leave plans and enroll into the deferred annual and sick earning accrual classes. The deferred programs will track service hours and entitlement to a defined maximum accrual. For example, full time employees may accrue to the maximum of 40 hours.

  Employees participating in an ELTP are not subject to the accrual limit and do not need to be enrolled into the deferred programs.

- Annual Leave.

  All donated hours are taken from the employee's annual leave accrual class. Update each of your annual accrual classes with the three donor earning codes defined with Donate to Bank, Donate to Emergency, and Donate to Recipient leave earning types.

Setting Up Earnings Accrual Classes for Leave Program Recipients

Use the Earnings Accruals component to set up earnings accrual classes for leave program recipients. You must use the specified values for the following fields:

- Class page: In the Leave Type field, select *Leave Program.*
- Balance page: The values you enter depend upon the purpose of the earnings code you're adding to the class.

  For earnings codes used to accrue recipient leave transfer, select *Add to Hours Earned.*

  For earnings codes used when recipients use transferred leave, select *Add to Service Hours* and *Add to Hours Taken.*

Setting Up Earnings Accrual Classes for Deferred Annual/Sick

Use the Earnings Accruals component to create a deferred earning accrual class for every annual and sick accrual class that has a different accrual maximum during an employee participation in the leave bank or transfer programs.

Deferred accrual classes need to mirror the accrual classes that they are replacing; the only difference in the two classes is the leave type and accrual ceiling.

For example, the Deferred Annual Accrual Class mirrors the Annual Accrual Class by having the same accrual calculation, carryover, expiration/termination, accrual rates, and balance earning codes. The only difference in the two classes is the Leave Type and Accrual Ceiling. In this example, enter the following information:

- Class page: In the Leave Type field, select *Deferred Annual.*
- Ceiling/Carryover page: Set up the accrual ceiling as desired for the deferred accrual class.

Setting Up Annual Accrual Classes for Leave Transfer Processing

All donated hours to bank and transfer programs are withdrawn from the employee's Annual Leave Accrual Class. You must update all your Annual Accrual Class Balance tables with the three earning codes you set up with the leave earnings types of Donate to Bank, Donate to Emergency, and Donate to Recipient.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "(USF) Setting Up Additional U.S. Federal Payroll Functionality," Defining Earnings Accrual Classes

Setting Up Leave Class Rules for Leave Transfer

Access the Leave Class Rules page.

You can define leave class rules to enroll an approved recipient automatically into the accrual class that you create to track leave program activity. Use this page to define the automatic enrollment rule for each leave program type you set up.

- Select *Leave Program Status* as the Leave Class Rules Criteria Type.
- Select the appropriate Leave Program Type.

See Also

Chapter 18, "(USF) Managing Leave," Setting Up Leave Class Rule Criteria, page 443

Administering Leave Donations

Employees may donate hours to an agency Leave Bank, ELTP, or VTLP. The contribution process is the same for the Bank and ELTP programs, where hours are donated to a common pool. However, the contribution process is different for the VLTP, where the hours are donated directly to an employee.

This section discusses how to:

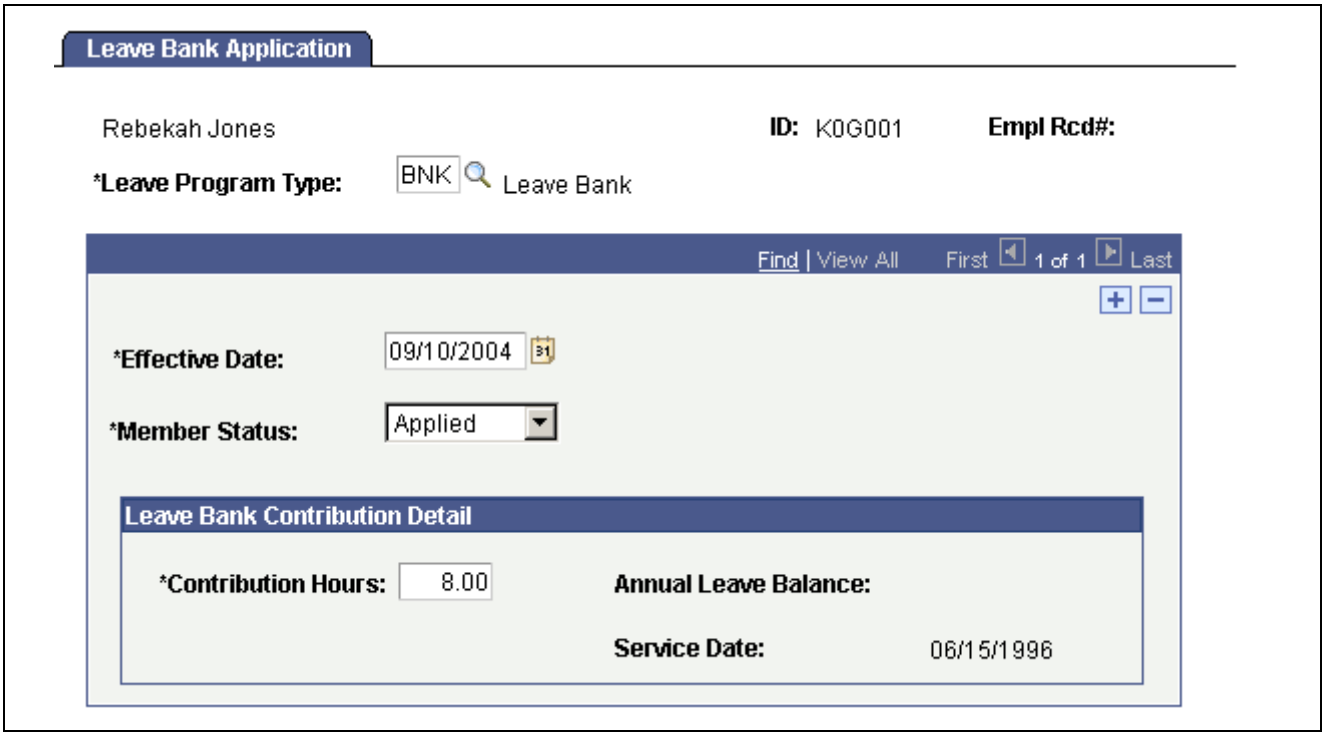
- Enter employee requests to contribute leave to a Leave Bank or ELTP.
- Enter employee donations to the VLTP.
- Enter employee requests to donate to another agency's leave transfer program.
- Run the Leave Bank and Transfer process to process donations and update accruals, additional pay, and leave ledgers.

Pages Used to Administer Leave Donations

Page Name	Object Name	Navigation	Usage
Leave Bank Application	GVT_LV_BANK_APP	Workforce Administration, Leave Administration USF, Reports, Leave Bank Application/Donate	Enter employee requests to contribute leave to a Leave Bank or ELTP.
Donor Contribution	GVT_LV_DON_CONTRIB	Workforce Administration, Leave Administration USF, Manage Leave Information, Voluntary Donations	Enter employee donations to the VLTP.
External Leave Donations	GVT_LV_DON_EXT	Workforce Administration, Leave Administration USF, Manage Leave Information, External Leave Donations	Enter employee requests to donate to another agency's leave transfer program.
Process Leave Bank / Transfer	RUNCTL_FGPY022	Workforce Administration, Leave Administration USF, Manage Leave Information, Request Leave Bank/Transfers	Run the Leave Bank and Transfer process to process donations and update accruals, additional pay, and leave ledgers

Entering Employee Requests To Contribute Leave To A Leave Bank Or Emergency Leave Transfer Program

Access the Leave Bank Application page.



Leave Bank Application page

Leave Program Type Select the leave program type to which the employee is donating. Valid values are the Leave Program Types you set up for Bank and Emergency leave programs.

Effective Date The request date of the application.

Member Status Select or view the member status of the leave request. Values are:

Applied: The Leave Bank Board has not processed the request and no annual leave contributions have been taken from the employee's current Earnings Accrual Class balance.

Approved: The leave review board has approved the donor's leave request. The system processes only *Approved* requests.

Contribute: The system processes the hours during the next payroll cycle and updates the hours on the employee's additional pay to reduce the balance by the donation hours on the application. Only the system can update the applicant's request to *Contribute*; it issues an error message if you select this value.

Cancelled: Indicates any other reason that the request is terminated.

Denied: The Leave Bank Board has evaluated the request and denied the donor's leave request.

Denial Reason 1 and **2** These fields appear if you select Denied as the Member Status. You must provide the applicant with at least one reason for denial.

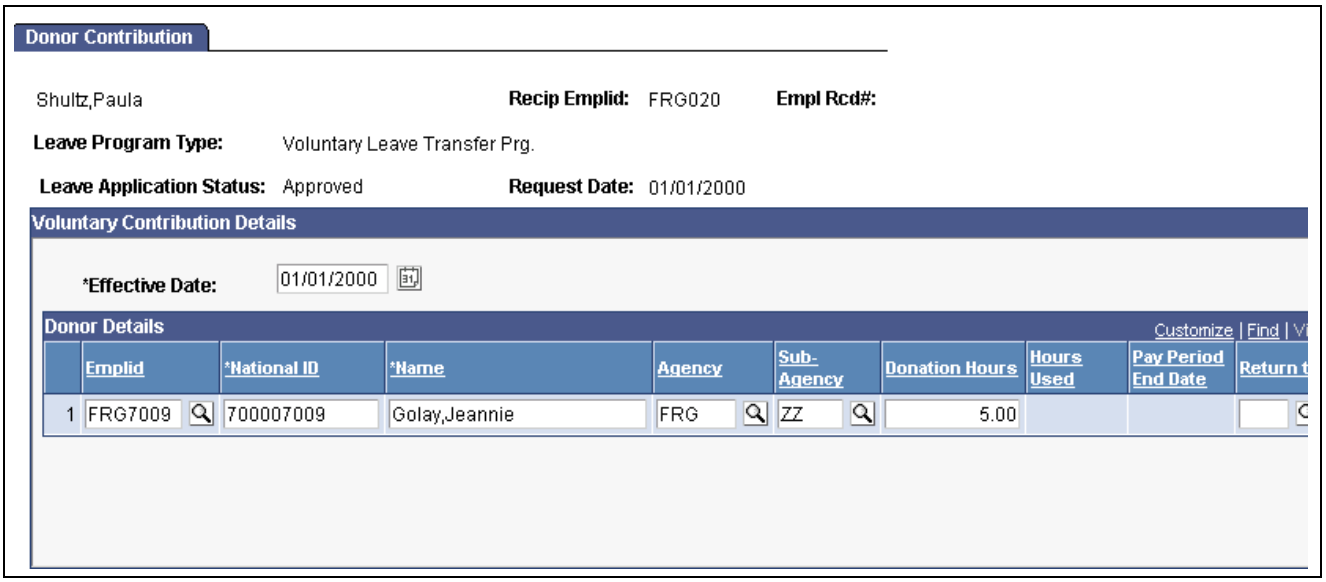
Contribution Hours Specify the number of hours the donor is contributing to the leave bank or ELTP.

Annual Leave Balance Displays the number of hours of annual leave the employee has as of this request date (Effective Date).

Service Date The basis for determining the length of service, on which the required contribution minimum is based.

Entering Employee Donations to Voluntary Leave Transfer Program

Access the Donor Contribution page.



Donor Contribution page

Note. Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

Recipient information is displayed at the top of the page.

Effective Date The date of the donation.

Donor Tracking

In this group box, enter the donor information. The system enters the pay period in which the donation was processed. Donations are not processed until the recipient's application is approved.

The Return to, Returned Processed, and Pay Period Return Date assist you in recording your manual leave donation return process. If an employee has donated leave, and it is not needed, it may be returned to the donor.

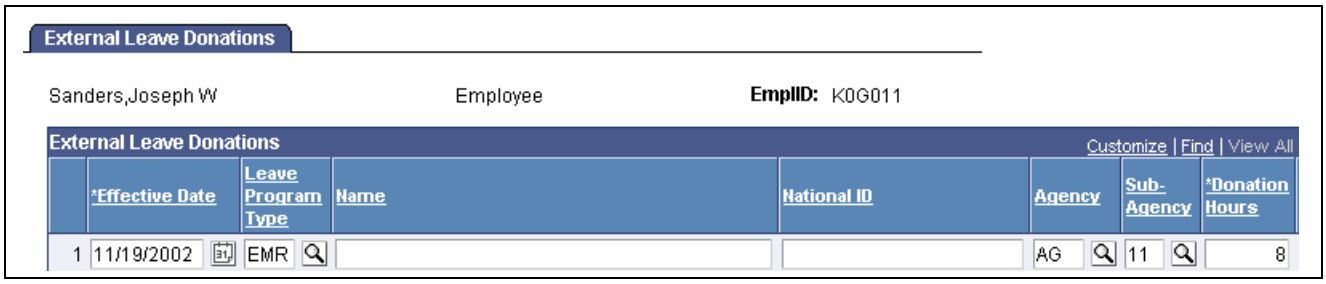
Return to Acknowledges the donor's choice for the disposition of where the leave should be returned in the case that any unused leave is returned. Valid values are *Donor* or *Bank*. This field is informational only and used to used to track the return of excess leave donation hours.

Returned Processed When a leave recipient has excess leave when their emergency is over, select this check box when the leave amount to be returned is restored to the Donor. This field is informational only and used to track the return of excess leave donation hours.

Pay Period Return Date Enter the date the leave is restored to the donor. The field is informational only and used to track the return of excess leave donation hours.

Entering Employee Requests To Donate To Another Agency's Leave Transfer Program

Access the External Leave Donations page.



External Leave Donations page

Note. Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

Record the details of donations made by an employee in your agency to another agency's leave transfer program. The system updates the donor's accrual balances when you run the Leave Bank / Transfer process.

Running the Leave Bank and Transfer Process

Access the Process Leave Bank / Transfer page.

Run the Leave Bank and Transfer process (FGPY022) after employees have donated hours. The process loads the Additional Pay page and applies the donation amount to the Leave Ledgers. The process can be run multiple times and should be run prior to your payroll cycle.

The system processes all employee leave bank applications with Member Status *Approved* and an effective date equal to or before the As of Date you enter on the run control page.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Maintaining Payroll Data," Entering Additional Pay Earnings Information

Chapter 18, "(USF) Managing Leave," Running the Leave Bank and Transfer Process for Approved Recipients, page 460

Administering Leave Recipients

Employees may receive hours from a Bank, ELTP or VTLP. The process to receive hours from all leave program types is the same.

This section discusses how to:

1. Enter employee requests to receive hours from any of the leave program types.
2. Enroll recipients in the leave program accrual class.
3. Run the Leave Bank and Transfer process for approved recipients.
4. View and adjust the data entered by the Leave Bank and Transfer process.
5. View recipient accrual balances.

Page Used to Administer Leave Recipients

Page Name	Object Name	Navigation	Usage
Leave Recipient Info (leave recipient information)	GVT_LV_RECIP_INFO	Workforce Administration, Leave Administration USF, Manage Leave Information, Create Leave Recipient App	Enter employee requests to receive hours from any of the leave program types.

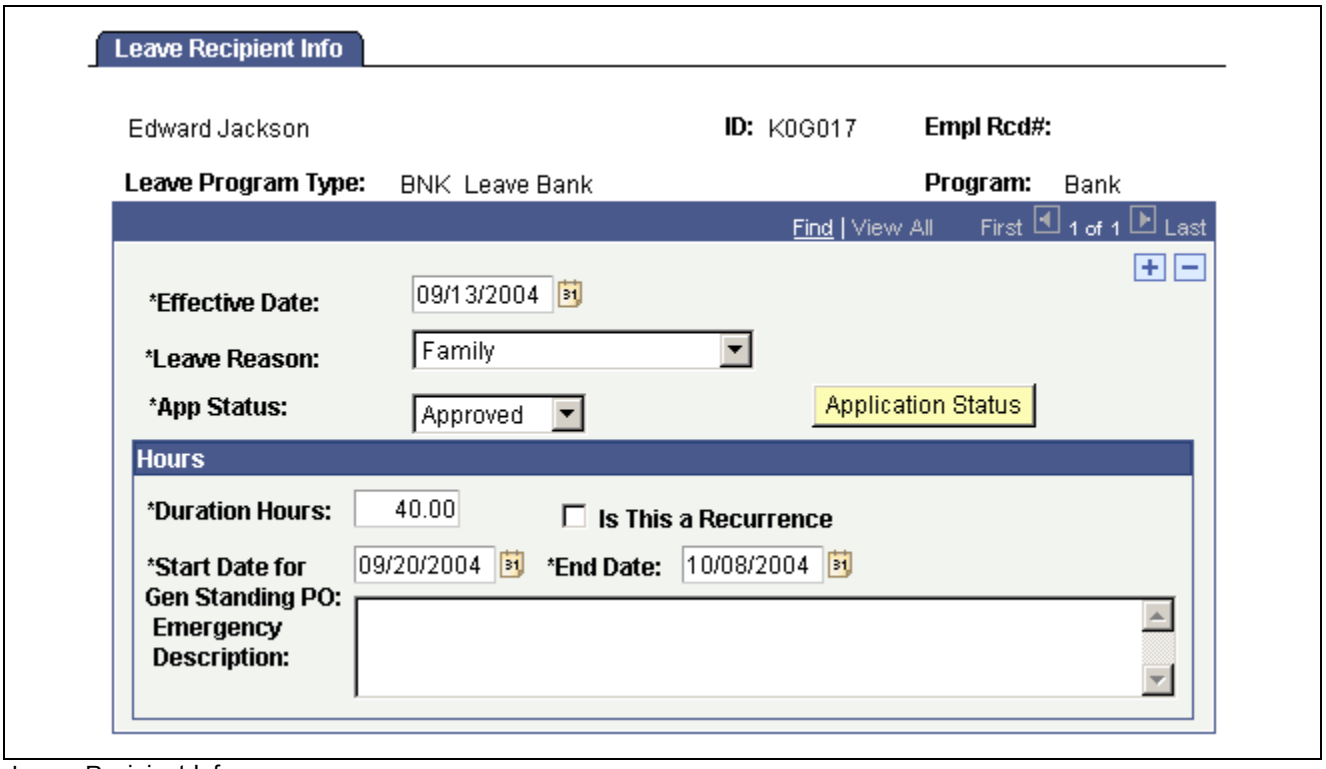
See Also

Chapter 18, "(USF) Managing Leave," Manually Entering or Adjusting Leave Enrollment, page 446

Chapter 18, "(USF) Managing Leave," Pages Used to Administer Leave Donations, page 455

Enter Employee Requests to Receive Hours From Any of the Leave Program Types

Access the Leave Recipient Info page.



Leave Recipient Info page

Effective Date Enter the date that leave program participation was requested.

Leave Reason Select the reason for the emergency leave requested. Values are *Employee, Family,* and *Agency.*

App Status (application status) Select the status from the following values:

Pending: The leave review board has not processed the request.

Approved: The leave review board has approved the request.

Denied: The leave review board has denied the request.

Separated: The employee separated from Federal service before the originally requested end date.

Cancelled: Any other reason that the request is not active.

Position Data Click to view the position number, pay plan, grade, and step of the potential leave recipient as of the request date. Standard hours and tour of duty are used to validate the minimum number of absence hours.

Application Status Click to identify the approver and the status Date. If the Leave Recipient Application has a status of Denied, then you may enter up to two. You must enter at least one denial reason. These codes are used later when generating Leave Recipient Denial letters.

Hours

Duration Hours Enter the number of hours requested (to the quarter-hour).

Is this a recurrence Select if the reason is a recurrence.

Start Date and **End Date** Enter the days on which the recipient requests the leave to begin and end.

Emergency Description Detail the reasons for needing transferred leave, including a brief description of the nature and severity of the emergency.

Enrolling Recipients in the Leave Program Accrual Class

While receiving hours from a leave program, the recipient must be enrolled in the leave program accrual class to record hours donated and used.

If the program is either a Bank or VLTP, terminate enrollment from their regular and sick earnings accrual classes using the Employee Accruals page. Then enroll the recipient into the deferred accrual classes to track accruals during the program participation and enforce the maximum entitlement.

If there is an auto enrollment leave class rule set up for the leave programs, then once the approved request is saved, the application opens the employee's Employee Accruals page and inserts the earning accrual defined in the class rule. While in the page, you may terminate the annual and sick and enroll the employee in the deferred annual and sick accrual classes.

See Also

Chapter 18, "(USF) Managing Leave," Manually Entering or Adjusting Leave Enrollment, page 446

Running the Leave Bank and Transfer Process for Approved Recipients

Access the Process Leave Bank / Transfer page.

The Leave Bank & Transfer process (FGPY022) processes *Approved* recipients.

If the employee is participating in a Bank or ELTP, the process:

- Updates the recipient's Additional Pay page with the earnings code defined on the Earnings Code Table with *Received from Bank* as the Leave Earning Type.
- Updates the Leave Ledger with hours withdrawn.

- If the employee is participating in a VLTP, the process updates the recipient's Additional Pay page with earnings code defined on the Earnings Code Table with *Received from Donor* as the Leave Earning Type.

See Also

Chapter 18, "(USF) Managing Leave," Running the Leave Bank and Transfer Process for Approved Recipients, page 460

Viewing the Data Entered by the Leave Bank and Transfer Process

See Chapter 18, "(USF) Managing Leave," Viewing Leave Donations to Leave Bank and Emergency Leave Transfer Programs, page 462.

Viewing Recipient Accrual Balances

See Chapter 18, "(USF) Managing Leave," Viewing Donor and Recipient Accrual Summaries, page 463.

Viewing Leave Transfer Data

After you run the Leave Bank / Transfer process, you can view leave transfer data.

This section discusses how to:

- View leave donations to leave bank and emergency leave transfer programs.
- View leave donations to voluntary leave transfer programs.
- View donor and recipient accrual balances.
- View donor contributions or hours received by recipients.
- View a summary of participation in a leave transfer program.

Pages Used to View Leave Transfer Data

Page Name	Object Name	Navigation	Usage
Leave Ledger	GVT_LV_BANK_LDGR	Workforce Administration, Leave Administration USF, Manage Leave Information, Review Leave Bank Ledger	View and adjust leave donations to leave bank and emergency leave transfer programs.
Leave Donation Tracking	GVT_LV_DON_TRACK	Workforce Administration, Leave Administration USF, Manage Leave Information, Track Leave Donation	View leave donations to voluntary leave transfer programs.
Leave Program Summary	GVT_LV_PRGM_SUMM	Workforce Administration, Leave Administration USF, Manage Leave Information, Review Leave Program Summary	View a summary of participation in a leave transfer program.

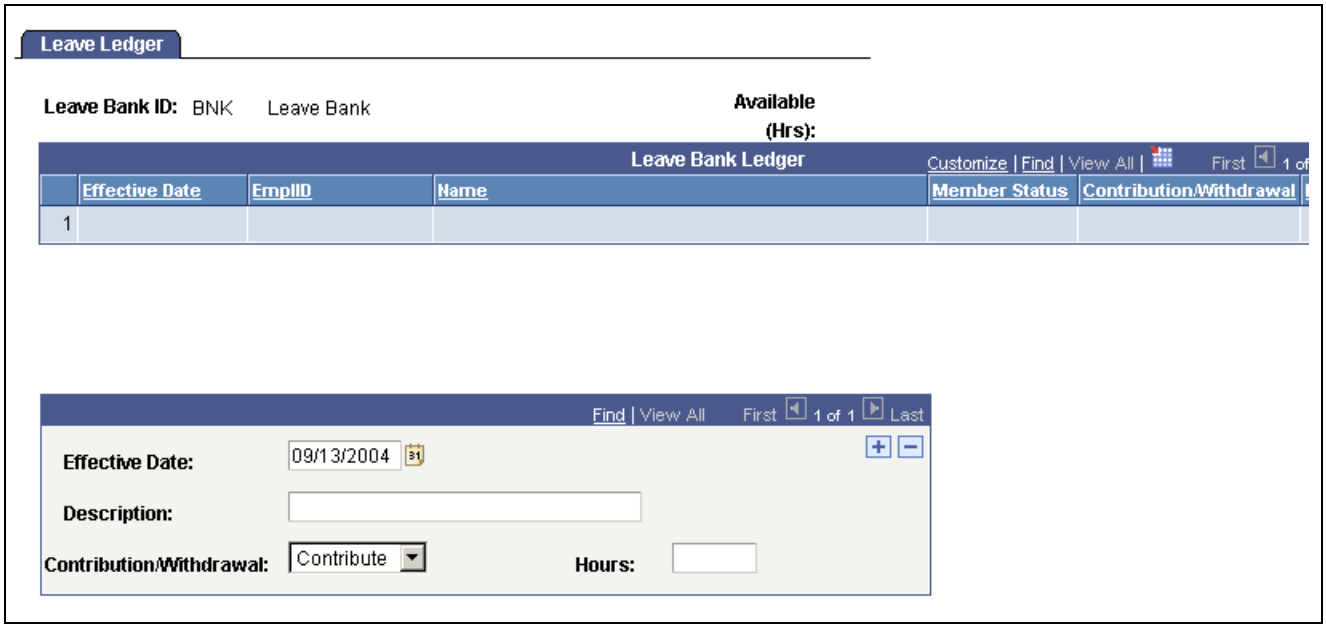
See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Maintaining Payroll Data," Entering Additional Pay Earnings Information

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Reviewing, Adjusting, and Deleting Employee Balances," (USF) Reviewing and Adjusting Leave Accrual Balances

Viewing Leave Donations to Leave Bank and Emergency Leave Transfer Programs

Access the Leave Ledger page.



Leave Ledger page

The Leave Ledger tracks the activity within the Bank and ELTP leave programs. The Leave Bank and Transfer process updates the ledgers with the transactions it has processed.

Available (Hrs) Displays the total number of hours available in the bank or ELTP. The system updates this value when you adjust the Contribution/Withdrawal and Hours fields.

Leave Bank Ledger

Effective Date Displays the As Of Date on the Leave Bank / Transfer process run control page.

EmplID and **Name** List of all the employees who have participated in the bank.

Member Status Displays the member status for the transfer.

Contribution/Withdrawal Indicates whether each transaction is a contribution or a withdrawal.

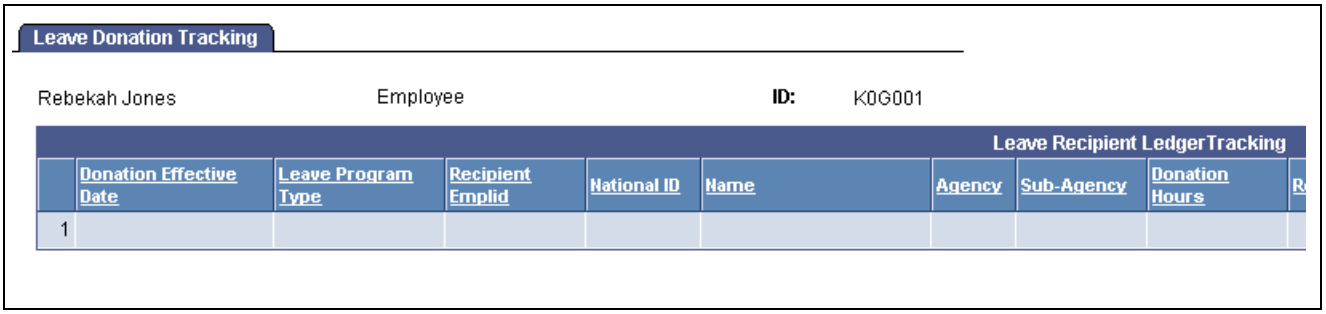
Hours Displays the number of hours contributed or withdrawn in each transaction.

Agency Ledger Adjustments

To adjust the hours, enter the effective date, the reason for the adjustment, and the hours to add or subtract. The system updates the Available Hours balance at the top of the page.

Viewing Leave Donations to Voluntary Leave Transfer Programs

Access the Leave Donation Tracking page.



Leave Donation Tracking page

Note. Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

The Leave Donation Tracking page tracks the activity within the VLTP program. The Leave Bank & Transfer process updates this page with the transactions it has processed.

The page lists the donor's contributions by effective date and recipient.

Viewing Donor and Recipient Accrual Summaries

View donor and recipient accrual balances on the Accrual Summary page after payroll is processed and leave accruals are run.

- Donors: The fields Hours Taken Year-to-Date and Hours Balance Year-to-Date are updated with the hours contributed.
- Recipients: Leave program earning accrual is updated with the hours received. When the recipient uses hours, the Hours Taken Year-to-Date and Service Hours YTD are updated.
- Recipients who terminate regular and sick accrual classes and enroll in deferred accrual classes: The deferred accrual class is updated with the pay period's Service Hours YTD, Hours Earned Year-to-Date, and Hours Balance Year-to-Date.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, "Reviewing, Adjusting, and Deleting Employee Balances," (USF) Reviewing and Adjusting Leave Accrual Balances

Viewing Donor Contributions or Hours Received by Recipients

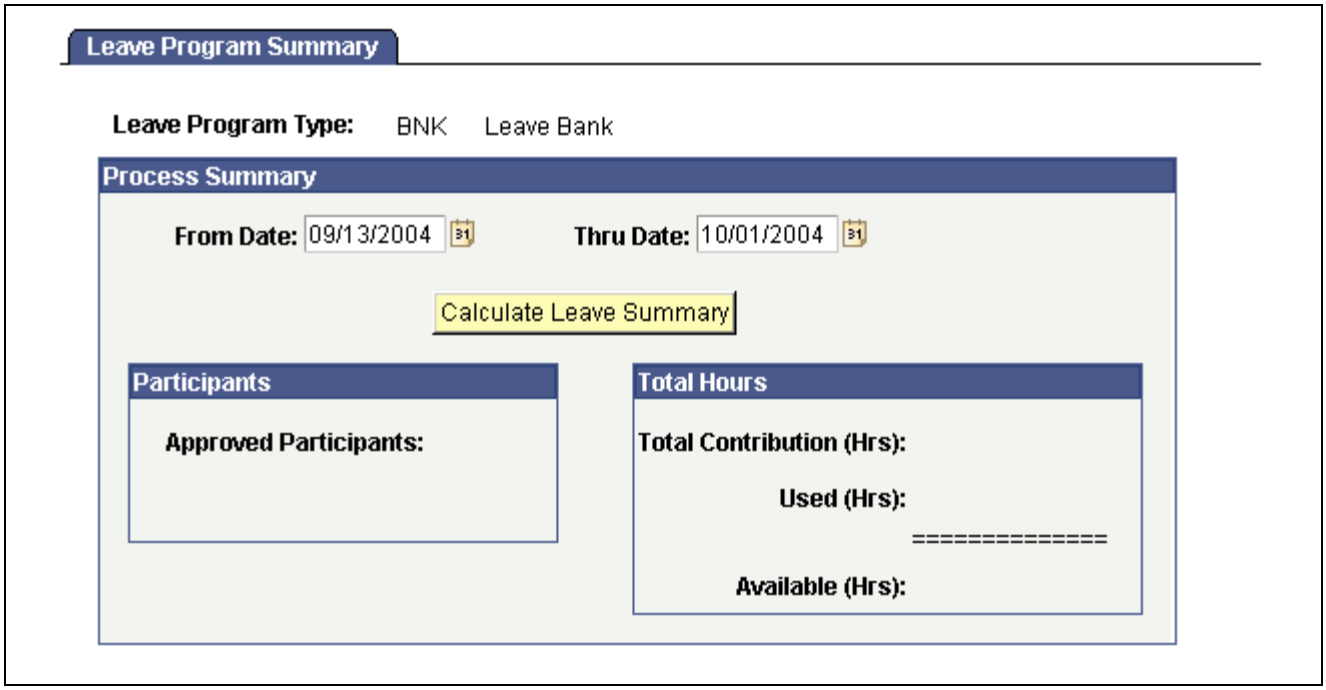
The Leave Bank and Transfer process inserts a row in the Additional Pay page for hours donated or received. The new row contains donor contribution or hours received information in the following fields.

Earnings Code The earnings code associated with the appropriate Leave Earn Type.

Effective Date	The As Of Date on the Leave Bank / Transfer page.
Earnings End Date	The end date of the pay period in which the effective date falls.
Hours	The hours donated or received.

Viewing a Summary of Participation in a Leave Transfer Program

Access the Leave Program Summary page.



Leave Program Summary page

From Date and **Thru Date**	Define the time period for which you want to see a summary.
Calculate Leave Summary	Click after entering the date range. The system displays summary information.
Participants	The system displays the number of approved participants and denied participants.
Total Hours	The system displays the total number of hours contributed, the total number of hours used, and the number of hours available for use (derived from the contribution hours and used hours).

Reporting on Leave Transfer Programs

PeopleSoft provides the following leave transfer reports:

- FGPY028 − Leave Acceptance Notifications.
- FGPY029 − Leave Bank Participants (required by OPM).
- FGPY030 − Leave Transfer Participants (required by OPM).

- FGPY031 − Leave Denial Notifications.

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, “PeopleSoft Enterprise Payroll for North America Reports”

Glossary of PeopleSoft Terms

absence entitlement This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take This element defines the conditions that must be met before a payee is entitled to take paid time off.

academic career In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).

academic institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

academic organization In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.

academic plan In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.

academic program In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.

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 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.

action template In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

address usage In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

adjustment calendar In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

administrative function In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

agreement In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

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.

analysis database In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on

courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.

Application Messaging PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft and third-party applications. An application message defines the records and fields to be published or subscribed to.

AR specialist Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.

arbitration plan In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.

assessment rule In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.

asset class An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

attribute/value pair In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.

audience In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.

authentication server A server that is set up to verify users of the system.

base time period In PeopleSoft Business Planning, the lowest level time period in a calendar.

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.

billing career In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.

bio bit or bio brief In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.

book In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.

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 activity The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.

business event In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

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).

business process A standard set of 17 business processes are defined and maintained by the PeopleSoft product families and are supported by Business Process Engineering group at PeopleSoft. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.

See also *detailed business process.*

business task The name of the specific function depicted in one of the business processes.

business unit A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.

campus In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.

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. A catalog item can have one or more learning activities.

catalog map In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company’s catalog.

catalog partner In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

category In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

channel In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

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.

checkbook In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

checklist code In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

class In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

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 *sub-classification.*

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

clone In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

cohort In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

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.

collection rule In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

comm key See *communication key.*

communication key In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

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.

component interface A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft database information using a program instead of the PeopleSoft client.

condition In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

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.

constituents In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

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 PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.

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.

control table Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.

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.

course In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also *class*.

course share set In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

current learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.

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 cube In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.

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.

dataset A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

detailed business process A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

dimension In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

directory information tree In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

division In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *cohort*.

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are 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 ledger Abbreviation for *Enterprise Incentive Management ledger.* 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.

elimination set In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

equity item limit In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Human Resources, also refers to an incident that affects 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.

exception In PeopleSoft Receivables, an item that either is a deduction or is in dispute.

exclusive pricing In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.

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.

financial aid term In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

forecast item A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

fund In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

gap In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

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.

gift table In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

GL business unit Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit*.

GL entry template Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

group In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.

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.

incur In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

initiative In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access.*

institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

integration A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft applications to work seamlessly with other PeopleSoft applications or with third-party systems or software.

integration point An interface that a system uses to communicate with another PeopleSoft application or an external application.

integration set A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

item In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

item shuffle In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

joint communication In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.

learner group In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

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 *rates*) 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.

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.

LMS Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.

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 *1*—is the address you use most often and may be different from the main address.

logistical task In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

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.

mass change In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also *3C engine*.

match group In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency The ability to process transactions in a currency other than the business unit's base currency.

national allowance In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

need In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package

	is based on the amount of financial need. The process of determining a student's need is called *need analysis.*
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page 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.
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 *compensation object.*
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	See *event.*
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (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.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
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 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.

planned learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.

planning instance In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

population In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.

See also *division* and *cohort*.

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.

price list In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.

price rule In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.

price rule key In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

primacy number In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.

primary name type In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

process category In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.

process group In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.

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 a Structured Query Report (SQR), a COBOL or Application Engine 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 A PeopleSoft or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products are displayed with the product name and release number.

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.

product family A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified PeopleSoft partners.

product line The name of a PeopleSoft product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.

programs In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects

In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

publishing

In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components

In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

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 *record input value-added tax flag.* 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 *record output value-added tax flag.*

See *record input VAT flag.*

recname

The name of a record that is used to determine the associated field to match a value or set of values.

recognition

In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

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.

regional sourcing

In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

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.

remote data source data Data that is extracted from a separate database and migrated into the local database.

REN server Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reversal indicator In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

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.

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.

roll up In a tree, to roll up is to total sums based on the information hierarchy.

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.

SCP SCBM XML message Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* PeopleSoft EnterpriseOne Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.

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.

search/match In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

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.

serial genealogy In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

service impact In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

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.

share driver expression In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

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 key process In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

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.

speed key See *communication key.*

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.

staging A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

standard letter code In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

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.

storage level In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

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 time period In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

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 *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.

TableSet A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

tax authority In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.

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.

third party A company or vendor that has extensive PeopleSoft product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft applications.

3C engine Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

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.

trace usage In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

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 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.

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.

tuition lock In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

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.

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.

update access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

See also *inquiry access.*

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.

VAT exception Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

VAT exempt Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

VAT exoneration Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

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

work order In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.

worker A person who is part of the workforce; an employee or a contingent worker.

workset A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.

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.

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.

XML link The XML Linking language enables you to insert elements into XML documents to create a links between resources.

XML schema An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

XPI Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with EnterpriseOne applications.

yield by operation In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

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. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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