



PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Salaries for the Netherlands

April 2005

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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.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press 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 Salaries for the Netherlands Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Enterprise HRMS 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 application: PeopleSoft Enterprise Human Resources Administer Salaries for the Netherlands.

PeopleSoft Enterprise HRMS Application Fundamentals

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*.

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 application and other applications. • 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 application and the functionality within the application.
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the application. For example, if functionality X is part of a application, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. Note. There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.

Chapters	Description
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of an application, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. 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 application's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

CHAPTER 1

Getting Started with Administer Salaries for the Netherlands

This chapter discusses:

- Administer Salaries for the Netherlands business processes.
- Administer Salaries for the Netherlands business integration.
- Administer Salaries for the Netherlands implementation.

Administer Salaries for the Netherlands Business Processes

Administer Salaries for the Netherlands supports the following business processes:

- Record earnings and payments.

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

- Record benefits and deductions.

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

Administer Salaries for the Netherlands Integrations

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

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

We cover integration considerations in this PeopleBook.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Working with Enterprise Integration Points in PeopleSoft HRMS”

Administer Salaries for the Netherlands 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.

Other Sources of Information

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

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

PeopleSoft Enterprise Setup Manager for HRMS and Campus Solutions 8.9 PeopleBook

CHAPTER 2

Understanding Administer Salaries for the Netherlands

This chapter provides an overview of the Administer Salaries for the Netherlands business process in Human Resources.

Administer Salaries for the Netherlands Overview

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

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

Note. The Administer Salaries for the Netherlands functionality has been designed primarily for customers using Human Resources with PeopleSoft Enterprise Payroll Interface. If you are using PeopleSoft Enterprise Global Payroll for the Netherlands, you should use the designated functionality found in that application. This includes setup and assignments for earnings and deductions, enrollment into benefits, and setup and administration of social insurance and tax data. Information on how to set up and administer these business processes can be found in the *PeopleSoft Enterprise Global Payroll for the Netherlands 8.9 PeopleBook*.

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

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

See Also

PeopleSoft Enterprise Global Payroll for the Netherlands 8.9 PeopleBook, “Defining Country Data”

CHAPTER 3

Setting Up Administer Salaries for the Netherlands

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

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

Understanding Prerequisites, Common Elements, and Terminology

This section discusses:

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

Prerequisites

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

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

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

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, “Increasing the Workforce”

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

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

Common Elements Used in This Chapter

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

Terminology

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

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

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

Defining Earnings and Payments

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

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

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, “Increasing the Workforce”

Understanding Earnings

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

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

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

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

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

Understanding Earnings Programs

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

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

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

Pages Used to Define Earnings and Payments

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

Entering Information About Your Earnings Methods

Access the Earnings Table 1 page.

Earnings Table 1 | **Earnings Table 2**

Earnings Code: A05

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

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

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

Short Description: AUO 05%

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

Earnings Table 1 page

Payment Type

Flat Amount

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

Unit/Override Rate

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

Hours Only

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

Amounts Only

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

Defined by Salary System

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

Both Hours and Amount OK

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

Either Hours or Amount OK

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

Defining the Adjustment Factors and Tax Classes for Your Earnings Code

Access the Earnings Table 2 page.

The screenshot displays the 'Earnings Table 2' details in a web interface. At the top, there are tabs for 'Earnings Table 1' and 'Earnings Table 2'. Below the tabs is a header bar with 'Table 2 Details' and navigation links like 'Find', 'View All', 'First', '1 of 1', and 'Last'. The main content area contains several labeled fields: 'Earnings Code' (A05), 'Effective Date' (01/01/1980), 'Status' (Active), 'Rate Adjustment Factor' (empty), 'Hours Adjustment Factor' (empty), 'Multiplication Factor' (0.0500), 'Earnings Adjustment Factor' (empty), and 'Maximum Yearly Earnings' (empty). To the right of these fields is a 'Tax Class' section with four radio button options: 'WT, SS' (selected), 'WT, NoSS', 'NoWT, SS', and 'NoWT, NoSS'. There are also '+' and '-' buttons in the top right corner of the form area.

Earnings Table 2 page

- Rate Adjustment Factor** The amount that applies to adjustments in pay rates. For example, if your collective labor agreement included an hourly cost of living adjustment, enter the value in this field for any applicable earnings (such as regular, overtime, vacation, and sick). Any employee getting this type of earnings is paid that hourly amount in addition to the compensation rate specified on that employee's job record.
- Hours Adjustment Factor** Enables you to indicate the adjustment to the number of hours associated with an earnings code, such as 40 hours for regular earnings. This number can be positive or negative.
- Multiplication Factor** To calculate hourly earnings, such as overtime or double time, for which a specific number or factor (such as 1.5 or 2.0 for double time) multiplies the earnings for overtime.
- Earnings Adjustment Factor** If you want to indicate a specific amount that doesn't affect pay rates or hours, enter it as a flat amount here. Use this type of definition for earnings codes for which the amount always remains the same for all employees, such as an 50.00 EUR Christmas bonus. When you set up this type of earnings, also set the multiplication factor to zero.
- Maximum Yearly Earnings** Enter a value to set a yearly ceiling on the earnings code.

Setting Up Earnings Programs

Access the Earnings Program Table page.

Earnings Program Table

Earnings Program ID: B01

Earnings Details Find | View All First 1 of 1 Last

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

***Description:** All Employees

Short Description: All emps

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

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

Earnings Program Table page

Earnings Code

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

Setting Up Work Shifts and Defining Shift Differential Pay

Access the Shift Table page.

Shift Table

SetID: SHARE Table Set shared across Corp
Shift: 1

Shift Table Information

Find | View All First 1 of 1 Last

*Effective Date: 01/01/1980 *Status: Active
Description: Shift 1 - ee level
Short Description: Shift 1
Time In Hour: 8 Time In Minute: to Time Out Hour: 17 Time Out Minute:
Employee Shift Differential?
☒ Specified at Employee level
Rate:
Factor:

Shift Table page

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

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

Specified at Employee level

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

Rate

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

Factor

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

Defining Benefits and Other Deductions

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

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

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

Understanding Benefit Plans

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

Plan types are assigned a numerical value and are divided up into categories based upon those values. For example, all health-related plan types begin with a *1*. Therefore, the system recognizes all plan types in the range of 10–19 as health plans. After that come the life insurance plans, with plan type values of 20–29, and so on.

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

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

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

Plan Type Numbers	Plans
10–19, 1A–1Z	Health plans
20–29, 2A–2Z	Life insurance plans
30–39, 3A–3Z	Disability plans
40–49, 4B–4Z	Savings plans
4A	Employee stock purchase plans (ESPPs)
50–59, 5B–5Z	Leave plans
5A	Company car (European organizations only)
60–69, 6A–6Z	Flexible spending account plans (U.S. and Canada)
70–79, 7A–7Z	Retirement plans (U.S.)
80–89, 8A–8Z	Pension plans (U.S. and Canada)
90–99, 9A–9Z	Vacation buy/sell plans

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

The plan types delivered by Human Resources are as follows:

Plan Type	Description	Plan Type	Description
10	Medical	4A	ESPP
11	Dental	50	Sick leave
12	Medical/Dental	51	Vacation leave
13	Major medical	52	Personal leave
14	Vision/Hearing	53	Family Medical Leave Act (FMLA) leave
15	Nonqualified medical	5A	Company car (European organizations only)
16	Nonqualified dental	60	Health care - FSA (Flexible Spending)
17	Nonqualified vision	61	Dependent care - FSA
20	Life	62	Legal - FSA
21	Supplemental life	65	Canadian health care
22	AD/D	66	Canadian retirement counseling
23	Life and AD/D	70	PERS
24	Dependent AD/D	80	Standard pension (Canadian)
25	Dependent life	81	Supplementary pension (Canadian)
26	Survivor income	82	USDB Pension Plan 1
30	Short-term disability	83	USDB Pension Plan 2
31	Long-term disability	84	USDB Pension Plan 3
40	401(K)	85	USDB Pension Plan 4
41	Profit sharing	86	USDB Pension Plan 5
42	Thrift	87	USDB Pension Plan 6
43	IRA	90	Vacation buy
44	Capital accumulation	91	Vacation sell
45	U.S. Savings Bonds		

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

See Also

Chapter 5, “Entering Benefits and Deductions,” page 53

Understanding Benefit Programs

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

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

Understanding Deductions

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

To define a deduction:

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

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

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

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

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

- The Deductions report (INT005NL) provides an overview of the different deductions defined in the system.

This SQR is sorted by plan type, deduction code, and effective date. It prints the classification codes that you set up for each plan type on the Deduction Table page.

- The purpose of the General Deduction/Frequency report (INT006NL) is to provide information about valid general deduction codes that you entered into the system.

The report shows the calculation type code for each deduction and, where applicable, the flat rate or percentage, the employee pay frequency, and any additional flat deduction amounts.

See Also

Chapter 5, “Entering Benefits and Deductions,” Entering Data for General Deductions, page 69

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Setting Up Vendors”

Pages Used to Define Benefits and Other Deductions

Page Name	Object Name	Navigation	Usage
Deduction Table	DEDUCT_TABLE1_NL	Set Up HRMS, Product Related, Benefits NLD, Deduction Table	Specify, for all benefits deductions and general deductions, whether a deduction is permanent or incidental and how the deduction affects taxes.
General Deduction Table	GENL_DEDUCT_TBL_NL	Set Up HRMS, Product Related, Benefits NLD, General Deduction Table	Set up general deduction data and define how nonbenefit deductions are calculated. These deductions include parking fees, union dues, or garnishments. (For benefit deductions, use one of the Benefits tables.)
Company General Deductions	GDED_COM_TBL	Set Up HRMS, Product Related, Benefits NLD, Company General Deductions	Set up company general deductions.
Vendor Information	VNDR_ID1	Set Up HRMS, Product Related, Benefits NLD, Provider/Vendor Table, Vendor Information	Add a new provider.
Addresses	VNDR_ADDRESS	Set Up HRMS, Product Related, Benefits NLD, Provider/Vendor Table, Addresses	Add an address for a new provider.
Benefit Plan Table	BENEFIT_PLAN_TABLE	Set Up HRMS, Product Related, Benefits NLD, Benefit Plan Table	Set up a benefit plan definition. Also define providers, provider codes, and default deduction codes for all plan types.

Page Name	Object Name	Navigation	Usage
Coverage Code Tbl (coverage code table)	COVRG_CD_TBL	Set Up HRMS, Product Related, Benefits NLD, Coverage Codes, Coverage Code Tbl	Create new coverage codes for your benefit programs. PeopleSoft suggests that you give the coverage code a numerical values of one through seven. Coverage codes should be ordered according to their complexity, with Employee Only being first.
Benefit Program	BEN_PROG_DEFN1	Set Up HRMS, Product Related, Benefits NLD, Benefit Program Table, Benefit Program	Set up basic benefit program information.
Plan Type and Option	BEN_PROG_DEFN2	Set Up HRMS, Product Related, Benefits NLD, Benefit Program Table, Plan Type and Option	Link plan types to the benefit program and add important information about plan types.
Cost	BEN_PROG_DEFN3	Set Up HRMS, Product Related, Benefits NLD, Benefit Program Table, Cost	Link a benefit program and plan type to rate and calculate rules. Use the outer scroll arrow to enter information about more than one plan type.
Benefits Clone	BN_CLONE	Set Up HRMS, Product Related, Benefits NLD, Clone Benefit Program, Benefits Clone	Use the benefit program clone utility to identify a benefit program and have the system make an exact copy of that program with a different effective date. Give the duplicate program the same name as the original or rename it, which saves you time and effort when you create a new benefit program with a future effective date.

Setting Up Permanent and Incidental Deductions for Tax Purposes

Access the Deduction Table page.

Deduction Table		Deduction Table2	
Plan Type:	00 General Deduction	Deduction Code:	B00-03
Deduction Information Find First 1 of 1 Last			
*Effective Date:	01/01/1980		
*Description:	Travel Advance		
Short Description:	Travel Adv		
Deduction Priority:	125		
Special Processing:			
Maximum Arrears Payback			
☒ No Maximum ☐ Flat Maximum for Payback ☐ Factor x Regular Deduction			
Deduction Subset Find View All First 1 of 1 Last			
*Subset ID	Description		

Deduction Table page

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

Setting Up General Deduction Data

Access the General Deduction Table page.

General Deduction Table	
Deduction Code:	CA28BL
Description:	Board & Lodging Ben - Bx28T4A
Deduction Details Find View All First 1 of 1 Last	
*Effective Date:	01/01/1980
Deduction Rate or %:	
Deduction Calculation Routine	
☒ Flat Amount ☐ Percentage ☐ Calculated by Salary System	
Amount Per Pay Period Find View All First 1 of 1 Last	
*Pay Frequency:	D Daily
Deduction Flat/Addl Amount:	

General Deduction Table page

Deduction Calculation Routine

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

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

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

Calculated by Salary System: Select if the deduction is calculated by the payroll system.

Amount Per Pay Period

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

Pay Frequency

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

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

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

Setting Up Company General Deductions

Access the Company General Deductions page.

Company General Deductions

Company: KN1 Business Institute Netherlands

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

***Effective Date:** 01/01/1980

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

Company General Deductions page

Deduction Code Select deduction codes that are applicable for your company. Deduction codes are created on the DEDUCT_TABLE1_NL page.

Setting Up Benefit Plan Definitions

Access the Benefit Plan Table page.

Benefit Plan Table

Plan Type: 10 Medical **Benefit Plan:** BNFTE

Benefit Plans Find | View All First 1 of 1 Last

***Effective Date:** 01/01/1980

***Description:** BNFTE **Short Description:** BNFTE

SetID: BNUSA **Vendor ID:** BNFTE

Group Number: **SPD URL ID:**

Default Deduction Code:

Pay Mode

Pay Mode: Pay as Deducted

AP Payment Date Type: Check Date

Self-Service Plan Description:

Internal Administrative Contacts First 1 of 1 Last

	*Contact Type	*Contact ID	Contact Description
1			

Benefit Plan Table page

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

See Also

[Chapter 3, “Setting Up Administer Salaries for the Netherlands,” Defining Benefits and Other Deductions, page 13](#)

Creating Benefit Coverage Codes

Access the Coverage Code Tbl page.

Coverage Code Tbl

Coverage Code: A

Coverage Codes

Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900

*Status: Active

*Description: Employee + 1 Dependent

Short Description: Empl+1 Dep

COBRA Coverage Set:

Total Covered Persons ☒ Total Minimum Covered 2 Total Maximum Covered 2

Allowable Covered Person Types

Customize | Find First 1-3 of 3 Last

	Covered Person Type	Minimum Covered	Maximum Covered		
1	Child	0	0	+	-
2	Domestic Partner	0	0	+	-
3	Employee	0	0	+	-

Coverage Code Tbl page

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

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

Dependent Coverage

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

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

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

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

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

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

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

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

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

Non Qualified Dep Coverage (non-qualified dependent coverage)

Not used for operations in the Netherlands.

Setting Up Basic Benefit Program Data

Access the Benefit Program page.

Benefit Program	Plan Type and Option	Cost
Benefit Program: B01 Effective Date: 01/01/2000 Status as of Effective Date: Active *Description: Benefits Full Time Program Program Type: Automated Short Description: Ben FT Currency Code: USD		
Dependent Limits Dependent Age Limit: 18 Student Age Limit: 22 ☒ Exclude Disabled from Age Lmt. ☒ Dep Ineligible if Married		
COBRA COBRA Surcharge %: COBRA Disabled Surcharge %: COBRA Contact ID:		
FMLA FMLA Plan ID: KUB Roll-Bkwd		
Benefits Administration Apply Excess Credits to: C Cash		
FSA Flexible Spending Acct Run ID: FSA Minimum Check Amount: \$0.00 FSA Maximum Annual Pledge: 7000.00		
Self-Service Configuration ☒ Show Credits on Enrollmnt Form ☐ Include Can Sales Tax on Form Cost Freq on Enrollment Form: Deduction Handbook URL ID:		

Benefit Program page

Program Type

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

When you create the benefit program, use PeopleSoft Enterprise Benefits Administration in association with the Manage Base Benefits business process in Human Resources and select the Benefits Administration check box in the Installation table, set the Program Type field to *Automated*.

Currency Code

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

Dependent Age Limit

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

Student Age Limit

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

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

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

Dep Ineligible if Married (dependent ineligible if married)

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

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

Linking Benefits Programs to Plan Types

Access the Plan Type and Option page.

Plan Type and Option page

Plan Type

Plan Type

Select a plan type from the predefined list of values. By adding rows, you can use this page to enter information for each plan type associated with a particular benefit program.

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

Waive Coverage

Select this check box if the plan type allows it.

Option

Optn ID (option ID)

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

Optn Type (option type)

Each row must have an option type designation. The option type that you select determines the remaining fields that you must complete on the Plan Type and Option (BEN_PROG_DEFN2) and the Cost (BEN_PROG_DEFN3) pages

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

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

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

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

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

- Benefit Plan

Enter the code for a benefit plan that was defined on the Benefit Plan Table page.
- Covrg Code (coverage code)

Indicate the level of coverage for health plan types (1x). This is a required field for those plan types.
- Deductn Cd (deduction code)

Indicate how to handle deductions.

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

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

Linking Benefits Programs to Rate and Calculate Values

Access the Cost page.

Benefit Program

Plan Type and Option

Cost

Benefit Program: B01

Effective Date: 01/01/1990

Plan Type

Find | View All

First 1 of 22 Last

Plan Type: 01 Ben Prgm

Option

Find | View All

First 1 of 2 Last

Option ID: 1

Option Type: P

Benefit Plan:

Coverage Code:

Cost

Cost Type	Cost ID	Rate Type	Rate TblID	Earn Code	Calc TblID		

Cost page

- Option ID

The option ID information that you entered for each plan type. For each plan type, use the scroll arrows to navigate between the option IDs.
- Option Type

The option type information that you entered for each plan type.
- Benefit Plan

The benefit plan information that you entered for each plan type.
- Coverage Code

The coverage code information that you entered for each plan type.
- Cost Type

Enter a cost type: *Price*, *Credit*, or *None*.
- Rate Type

Enter a rate type to specify which table should be used to determine rates for the plan type.

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

Using the Benefit Program Clone Utility

Access the Benefits Clone page.

Benefits Clone

*Object Type to Clone: Benefit Program

Copy From

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

Copy To

Benefit Program: Effective Date:

*Program Type: Manual

Clone

Benefits Clone page

Copy From

Benefit Programs

Select the benefit programs that you want to duplicate.

Copy To

Benefit Program

Enter the benefit program name that you want to create.

Effective Date

Enter the effective date for the benefit program that you are creating.

Clone

Click to run this request. Process Scheduler runs the benefit program clone process at user-defined intervals.

Organizing Your Payroll Processes

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

- Identify bank codes.

- Define holiday schedules.
- Create and maintain pay groups.
- Enter additional data pay group processing parameters.
- Set up pay run IDs.
- Create pay calendars.

Understanding Pay Groups and Pay Group Setup

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

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

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

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

KN1—Monthly	Employees who are paid monthly and share the same pay period, which ends on the last day of the month, may belong to the same pay group. Salaried employees at GBI are paid monthly.
KN2—Semi-Monthly	Employees who are paid semimonthly and share the same pay periods, ending on the 15th and last day of the month, may also belong to the same pay group. Exception hourly and hourly employees at GBI are paid semimonthly.

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

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

See Also

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

Pages Used in Organizing Your Payroll Process

Page Name	Object Name	Navigation	Usage
Bank Table	BANK_EC	Set Up HRMS, Common Definitions, Banking, Banks, Bank Table	Identify every bank and savings institution where your company has accounts established for payroll purposes, with the exception of employee's direct deposit accounts.
Branch Table	BANK_BRANCH_EC	Set Up HRMS, Common Definitions, Banking, Banks, Branch Table	Identify bank branches for your company.
Account Code Table	ACCT_CD_TABLE	Set Up HRMS, Common Definitions, Chartfield Configuration, ChartField Transaction Table	Assign unique account codes that you can reference in your payroll system and track the distribution of your organization's payments and expenses against budgeted accounts. If you plan to implement extensive account reporting, this table may be large.
Holiday Schedule	HOLIDAY_SCHED_TBL	Set Up HRMS, Foundation Tables, Organization, Holiday Schedule	Define a list of scheduled holidays that can be used on the Pay Group table. Holiday schedules that you set up through either navigation can be passed on to a third-party payroll system. Do not include personal floating holidays on this list. Because holidays may vary for different segments of your employee population, depending on location, work schedules, or other factors, you can set up as many holiday schedules on this table as needed.
Pay Group Table - Definition	PAYGROUP_TABLE1	Set Up HRMS, Product Related, Benefits NLD, Pay Group Table, Definition	Create and maintain pay groups.

Page Name	Object Name	Navigation	Usage
Pay Group Table - Calc Parameters (pay group table - calculation parameters)	PAYGROUP_TBL3_GBL	Set Up HRMS, Product Related, Benefits NLD, Pay Group Table, Calc Parameters	Enter additional pay group processing parameters, including the bank and account, net pay minimums and maximums, and valid earnings codes. When you first add a pay group, a dialog box prompts you for a company ID and pay group ID. The company ID is a key field on the Pay Group table, implying that all employees in a pay group are also in the same company. For the pay group ID, use any three-character alphanumeric ID that conforms to your payroll system standards.
Pay Run Table	PAY_RUN_TABLE_NLD	Set Up HRMS, Product Related, Benefits NLD, Pay Run Table	Set up the pay run IDs that you use to combine pay calendar entries from different pay groups for payroll processing. The Pay Run Table page and procedures for establishing pay run IDs are the same for several other PeopleSoft payroll applications.
Pay Calendar Table	PAY_CAL_TBL_NLD	Set Up HRMS, Product Related, Benefits NLD, Pay Calendar Table	Schedule payroll cycles for your pay groups and specify when pay periods begin and end. You must have a calendar entry for every pay period for each pay group that you set up. Each entry on the Pay Calendar Table page corresponds to a specific pay period for a pay group, defined by the begin and end dates. For example, a monthly pay group would have 12 entries on the Pay Calendar Table page, representing a year of processing.

Identifying Bank Codes

Access the Bank Table page.

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

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

See Also

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

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Setting Up Local Country Functionality,” (NLD) Loading Dutch Postal Codes

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, “Increasing the Workforce,” Understanding Job Data

Defining Holiday Schedules

Access the Holiday Schedule page.

See Also

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

Creating and Maintaining Pay Groups

Access the Pay Group Table – Definition page.

Definition | **Process Control** | **Calc Parameters**

Company: KN1 Business Institute Netherlands

Pay Group: KN1

Pay Group Information Find First 1 of 1 Last

***Effective Date:** 01/01/2001 ***Status:** Active

***SetID:** NLD01 ☐ **Retiree Pay Group**

***Description:** Monthly - Netherlands **PI Configuration ID:**

Short Description: Monthly **Deduction Priority:**

***Country:** NLD Netherlands

Currency: EUR euro

***Employee Type Default:** Salaried

Frequency

***Pay:** M Monthly

***Daily:** D Daily

***Monthly:** M Monthly

GL Use

Rate Type: OFFIC **Conv Date:** C

Pay Group Table – Definition page

Pay Group Information

Retiree Pay Group

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

PI Configuration ID (payroll interface configuration ID)

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

Deduction Priority

Enter a deduction priority number for your pay group.

Currency

Select the appropriate currency.

Employee Type Default

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

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

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

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

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

Frequency

Pay

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

Daily

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

Monthly

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

GL Use

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

Entering Additional Pay Group Processing Parameters

Access the Pay Group Table – Calc Parameters page.

The screenshot displays the 'Pay Group Table – Calc Parameters' page. At the top, there are three tabs: 'Definition', 'Process Control', and 'Calc Parameters'. The 'Calc Parameters' tab is selected. Below the tabs, the 'Company' is set to 'KN1 Business Institute Netherlands' and the 'Pay Group' is 'KN1 Monthly - Netherlands'. The main section is titled 'Paygroup information' and includes a search bar with 'Find | View All' and navigation buttons for 'First', '1 of 1', and 'Last'. The fields are organized as follows:

- Effective Date:** 01/01/2001
- Status:** Active
- Source Bank ID:** KN01 (with a magnifying glass icon) ABN AMRO
- Minimum Net Pay:** (empty field)
- *Maximum Net Pay:** 10,000
- Earnings Program ID:** KN1 (with a magnifying glass icon) Netherlands Earnings Program
- Regulatory Region:** NLD (with a magnifying glass icon)
- Holiday Schedule:** KN01 (with a magnifying glass icon) Netherlands Holiday Schedule
- Default Benefit Program:** KN1 (with a magnifying glass icon)
- Retro Pay Program ID:** (empty field with a magnifying glass icon)
- Final Check Program ID:** (empty field with a magnifying glass icon)
- Netherlands:** (dropdown menu with the Netherlands flag icon)
- Collective Labor Agreement:** DET (with a magnifying glass icon)

An 'Earnings Types' section is also present, containing:

- *Regular Hours Earnings Type:** REG (with a magnifying glass icon)
- *Regular Earns Earnings Type:** REG (with a magnifying glass icon)
- *OT Hours Earnings Type:** OTP (with a magnifying glass icon)
- *Holiday:** HOL (with a magnifying glass icon)

Pay Group Table – Calc Parameters page

Paygroup Information

Source Bank ID

For use with Payroll for North America only.

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

Earnings Types

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

Netherlands

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

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Working with Regulatory Regions,” Associating a Regulatory Region with a Transaction

Setting Up Pay Run IDs

Access the Pay Run Table page.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Setting Up Pay Calendars,” Creating Pay Run IDs

Creating Pay Calendars

Access the Pay Calendar Table page.

Pay Calendar Table

Pay Group: KAMONTHLY Monthly Pay Group

Calendar Generation Parameters

Pay Frequency: Monthly

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

Pay Periods [Customize](#) | [Find](#) | [View All](#) | First 1-5 of 36 Last

Pay Period Begin Date	Pay Period End Date		
01/01/2003	01/31/2003	+	-
02/01/2003	02/28/2003	+	-
03/01/2003	03/31/2003	+	-
04/01/2003	04/30/2003	+	-
05/01/2003	05/31/2003	+	-

Pay Calendar Table page

Pay Period End Date

The date on which the pay period ends in the payroll cycle.

Pay Run ID

Each payroll background process needs a pay run ID to determine which pay group it should process. The system processes all pay calendar entries with the same pay run ID at the same time.

Before you start payroll processing for a pay period, you must assign a pay run ID on this page. Establish the pay run ID on the Pay Run Table page.

Pay Period Begin Date

Select the date on which the pay period begins in the payroll cycle.

Paycheck Issue Date

The date that appears on the employee's paycheck or advice slip.

Calendar Year

The calendar year for the pay run.

Month

The month for the pay run.

Number of workdays

The number of workdays in the pay period for this pay run.

Production Code

Your third-party payroll system uses this field for information for the specific payroll run or for printing on the final pay slip.

Text Payment Order

Your third-party payroll system uses this field for including information for the specific payroll run or for printing on the final pay slip.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Setting Up Pay Calendars,”
Understanding Pay Calendars

Establishing Additional Benefits Features

This section lists common elements and discusses how to:

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

Common Elements Used in This Section

Age Range Low

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

Age Range High

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

Pages Used in Establishing Additional Benefits Features

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

Setting Up Leave Plans

Access the Leave Plan Table page.

Leave Plan Table

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

Leave Plans

Find | View All First 1 of 1 Last

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

Accrual Process Date:

Accrual Calculation

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

Automatic Accrual Processing

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

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

Leave Plan Table page (1 of 2)

Manual Accrual Processing

☐ Pay in Lieu of Time Off

☒ Pay at Termination Percent to Pay at Termination:

☒ Allow Negative Balance Max Negative Hours Allowed:

First Year Award Values

Customize | Find | View All |

First ◀ 1 of 1 ▶ Last

*Employment Month	*Hours Earned	*Month Eligible
0		

Accrual Rate Values

Customize | Find | View All |

First ◀ 1-3 of 3 ▶ Last

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

Service Bonus Values

Customize | Find | View All |

First ◀ 1-3 of 3 ▶ Last

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

Find | View All First ◀ 1 of 1 ▶ Last

Leave Plan Table page (2 of 2)

Leave Plans

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

Accrual Calculation

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

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

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

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

Hours per Hour = *Every Run*.

Hours per Pay Period = First Run of Pay Period.

Hours per Week = First Run of Week.

Hours per Months = First Run of Month.

Hours per Year = First Run of Year.

Automatic Accrual Processing

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

Special Calculation Routine	Select if your company has programmed a special calculation method.
Max Leave Balance (maximum leave balance)	Enter the maximum leave hours that an employee can accrue for the leave plan. If there is no maximum, enter 99999.
Service Calc at Year Begin (service calculation at year begin)	Select to calculate leave hours according to length of service as of January 1 of the current year. Don't select this check box if you want to calculate leave hours according to the length of service as of the leave accrual process date. When performing this calculation, the system uses the service date in the employee's employment record.
Max Leave Carryover (maximum leave carryover)	Enter the maximum number of hours that an employee can carry from one calendar year to the next. The system accepts a zero to indicate that there is no carryover allowed. If there is no maximum, enter 99999.

Manual Accrual Processing

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

Pay in Lieu of Time Off	Select if you pay employees for accrued leave time that they don't use.
Pay at Termination	Select if employees can be paid at termination for a portion or for all time accrued.
Percent to Pay at Termination	If you selected the Pay at Termination check box, enter the percentage of pay that employees receive at termination.
Allow Negative Balance	Select if you allow employees to take more hours than they have accrued.
Max Negative Hours Allowed (maximum negative hours allowed)	Enter the maximum number of negative hours the employee is allowed.

First Year Award Values

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

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

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

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

Accrual Rate Values

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

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

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

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

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

Service Bonus Values

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

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

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

Entering Pension Plan Details

Access the Pension Plan Table page.

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

Pension Plan Table page

US Pension Plans

- Pension Type** This field is for U.S. and Canadian functionality, not for operations in the Netherlands.
- Allow Contingent Beneficiaries** This check box is for U.S. and Canadian functionality, not for operations in the Netherlands.
- Plan Yr Begins (Month/Day)** (plan year begins [month/day]) The year in which the pension plan begins. Enter the information in month/day format.
- Plan Yr Ends (Month/Day)** (plan year ends [month/day]) The year in which the pension plan ends. Enter the information in month/day format.

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

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

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

Contributory Plans

Voluntary Contributions Allowed (voluntary contributions allowed)

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

Special Accumulator Code

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

Rates of Deduction

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

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

Setting Up Age-Graded Rates

Access the Age-Graded Rate page.

Age-Graded Rate

Age-Graded Rate Table ID: B101

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

*Effective Date: 01/01/1900

*Description: B101 Short Description:

*Premium Pay Frequency: M Monthly *Rate per Unit: None Specify Limit

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

*Gender	Age Range Low	Age Range High	Total Rate - Smoker	Total Rate - Non-smoker
Female	0		50.000	
Male	0		50.000	

Age-Graded Rate page: General tab

Age-Graded Rate Table

Effective Date

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

Rate per Unit

Select from the following values:

None: For a flat rate.

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

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

Specify Limit

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

General Tab

Access the Age-Graded Rate page: General tab.

Gender

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

Total Rate - Smoker

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

Total Rate - Nonsmoker

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

Employer Portion Tab

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

Coverage/Price						Customize Find View All First 1-2 of 2 Last	
General		Employer Portion		Employee Portion			
*Gender	Age Range Low	Age Range High	Smoker	Nonsmoker			
Female	0		50.000		+	-	
Male	0		50.000		+	-	

Age-Graded Rate page: Employer Portion tab

Smoker

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

Nonsmoker

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

Employee Portion Tab

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

Coverage/Price						Customize Find View All First 1-2 of 2 Last	
General		Employer Portion		Employee Portion			
*Gender	Age Range Low	Age Range High	Smoker	Nonsmoker			
Female	0				+	-	
Male	0				+	-	

Age-Graded Rate page: Employee Portion tab

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

Creating Life and Accidental Death and Dismemberment Insurance Coverage Groups

Access the Coverage Group Tbl page.

Coverage Group Tbl page

- Coverage Groups** The fields in this group box define coverage group codes that set the maximum total life and AD/D coverage for life insurance and AD/D insurance benefit plans.
- Coverage Maximum** Enter a maximum coverage amount for the coverage group. This amount applies to all the life and AD/D insurance benefit plans associated with the coverage group code and associated with one benefit program.

Specifying Employee Bank Information

This section discusses how to enter payment method data.

Page Used to Specify Employee Bank Information

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

Entering Payment Method Data

Access the Bank/Giro page.

Bank/Giro

Kees den Bakker ID: KN0003

Direct Deposit Details Find | View All First 1 of 1 Last

*Effective Date: 01/01/1999 *Status: Active

Bank Details Find | View All First 1 of 1 Last

Priority: 1 Payment Type: ☐ Cash ☒ Bank ☐ Giro

Bank ID: 01506801

Branch ID:

Account #: 161513565

Ledger Account#:

%Net Pay / Amount: 100.00 Ascription: Salary

Payment Description: Base Salary

Bank/Giro page

Priority

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

Account # (account number)

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

Ledger Account# (ledger account number)

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

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

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

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

Ascription

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

CHAPTER 4

Entering Earnings, Payments, and Other Payroll Information

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

Understanding Earnings and Payments

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

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

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

Some important terms to understand are:

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

Common Elements in This Chapter

Earnings Code	Enter the earnings code for the employee. If there is more than one earnings code, add additional rows. Although you can enter an unlimited number of earnings for an employee, the types of possible earnings for an employee depend upon the employee's company and pay group.
----------------------	--

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

Entering Employee Earnings

This section discusses how to:

- Enter permanent earnings data.
- Enter incidental payments.
- Enter incidental hours data.
- Enter incidental hourly earnings data.

Pages Used to Enter Employee Earnings

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

Entering Permanent Earnings Data

Access the Earnings page.

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

Earnings page

Earnings End Date

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

Compensation Rate/Frequency

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

Standard Hours

The standard hours that the employee works per work week.

Work Period

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

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

Employee Type

The employee type according to predetermined variables.

Reason

Select a reason for the payment.

Goal Amount

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

Entering Incidental Payments

Access the Incidental Earnings page.

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

Incidental Earnings page

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

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

Entering Incidental Hours Data

Access the Incidental Hours page.

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

Incidental Hours page

Other Hours Enter the amount of other hours worked.

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

Regular Shift Indicate the employee's regular shift.

Entering Incidental Hourly Earnings Data

Access the Hours Changed page.

Hours Changed

Effective Date: 03/31/2000

Hours Changed Details

Find | View All First 1 of 2 Last

*EmpID: KN0003 Kees den Bakker

Empl Rcd#: 0

Company: Business Institute Netherlands

Sequence: 0

Pay Group:

*Hours Type: OTP Overtime

Currency Code: NLG

Hours: 2.00

Hourly Rate: 75.00

Shift:

☒ OK to Pay

Begin Period:

End Period:

Comments:

Hours Changed page

Hours Type

Select the hours type. The hours type is an earnings code.

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

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

Shift

Select the employee's regular shift.

CHAPTER 5

Entering Benefits and Deductions

This chapter lists prerequisites and discusses how to:

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

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, “Increasing the Workforce”

Prerequisites

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

Reviewing Employee Eligibility for Benefits

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

Page Used to View Personnel Data

Page Name	Object Name	Navigation	Usage
Employee Data Summ (employee data summary)	EMPLOYEE_SUMMARY1	Workforce Administration, Benefit Information NLD, Review Benefits, Employee Data Summary, Employee Data Summ	View the personnel administration data that you need to determine an employee’s eligibility for benefits.

Viewing Personal Data for Benefits Eligibility

Access the Employee Data Summ page.

Employee Data Summ			
Santos,Antonio		Employee	EmplID: KU0010 Empl Rcd#: 0
Employee Summary Data			
Employee Status:	Active		
Benefits Employee Status:	Active		
Full/Part Time:	Full-Time		
Regular/Temporary:	Regular		
Standard Hours:	40.00		
Work Period:	Weekly		
Pay Group:	US Weekly		
Company:	Global Business Institute		
Employee Type:	Hourly		
Business Unit:	US006	GBI BU for US006	
Job Code:	170005	Assistant-Administrative	
Supervisor Level:			
Department:	10000	Human Resources	
Location Code:	KUNY00	Corporation Headquarters	
Annual Benefits Base Rate:			
National ID			
Country:	USA	NID Type:	PR SSN National ID 578-29-0482
Gender:	Male		
Marital Status:	Married		

Employee Data Summ page (1 of 2)

Significant Dates			
Hire Date:	09/12/1997	Service Date:	09/12/1997
Company Seniority Date:	09/12/1997	Rehire Date:	
Termination Date:		Date of Birth:	08/09/1972
Marital Status Date:	09/12/1997	Date of Death:	

Employee Data Summ page (2 of 2)

The Employee Status, Full/Part Time, Regular/Temporary, Pay Group, and Annual Benefits Base Rate fields each directly affect either benefit eligibility or benefit processing.

The date information that appears in the Significant Dates group box, such as hire date or seniority date, can directly affect benefit eligibility. The remaining fields are defined for the employee on the Job record.

Employee Summary Data

Employee Status	The employee's status, which is based on the last personnel action for the employee or the reason for the action, such as death.
Full/Part Time	Whether the employee works a full-time or part-time schedule as defined on the Job Data - Job Information page. See <i>PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce</i>, "Increasing the Workforce," Understanding Job Data. <i>Full-Time:</i> Defined by the standard hours that are specified in the Salary Plan table (SALARY_PLAN_TABLE) or by the default standard hours that are specified in the Installation table (INSTALLATION_TBL1B). However, if you specify default standard hours for a user ID on the Primary Permission List page, the default standard hours come from the Primary Permission List page for the ID. If an employee is hired into a location that is assigned a salary administration plan on the Location page, the salary administration plan defines what constitutes full time. <i>Part-Time:</i> Defined by the organization.
Regular/Temporary	Whether the employee is a regular or temporary employee as defined on the Job Data - Job Information page.
Standard Hours	The standard hours for the employee as defined on the Job Information page. Standard hours define how many hours the employee works in the job.
Work Period	The standard work period is the time period in which employees must complete the standard hours. The system uses the annualization factor of the standard work period in combination with the standard hours to calculate the full-time equivalent.
Pay Group	The employee's pay group as it's defined on the Pay Group Table - Definition page.
Employee Type	The employee type as defined on the Pay Group Table - Definition page.
Business Unit	An organizational level for tracking specific business information for reporting and other roll-up data collection.
Job Code	The job code for this employee as it's defined on the Job Code page.
Department	The employee's department as defined on the Department page.
Location Code	The employee's location code as defined on the Location page.
Annual Benefits Base Rate	This field is blank if the organization uses a benefits base that is different from regular pay. (Set up the benefits base rate on the Compensation page of the Job Data component.)
National ID	
NID Type (national identification type)	The employee's national identification type.
National ID	The employee's identification number.

Significant Dates

Service Date	The employee's service date.
Company Seniority Date	The date that the employee started service with a company in the organization.
Rehire Date	The employee's rehire date, if applicable.
Termination Date	The employee's termination date, if applicable.
Date of Birth	The employee's date of birth.
Date of Death	The employee's date of death, if applicable.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Working with Frequencies," Understanding Frequency in Compensation Rate Conversions

Identifying Employee Social Insurance Providers

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

Page Used in Identifying Employee Social Insurance Providers

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

Identifying Employee Participation in National Social Insurance Programs

Access the Social Insurance page.

Social Insurance

Kees den Bakker Employee ID: KN0003 Empl Rcd #: 0

Social Insurance Details Find | View All First 1 of 1 Last

*Effective Date: 01/01/1999 *Status: Active

National Health Service

*Premium Health Insurance: Deduction

SetID: NLD01

Vendor: KNZKV Dutch Health Service Provider

Registration No.:

☐ Reducement Unemployment

*Disability Insurance: Deduction

*Premium Health Law: No Ded

*Unemployment Tax: No Ded

Social Insurance page

- Premium Health Insurance** If the employee's income is below the national health care limit, then that employee is required by law to participate in a national health service scheme. Options are:
Deduction: Select if the law requires the employee's participation in a national health service scheme.
No Ded (no deduction): Select if the law doesn't require the employee's participation in a national health service scheme (ZFW).
- Vendor** If the employee is required to participate in a national health service scheme, select the vendor from the list. Leave this field blank if the law doesn't require the employee to participate in a national health service scheme.
- Registration No.**
 (registration number) If the employee is required to participate in a national health service scheme, enter the employee's association member registration number. Leave this field blank if the law doesn't require the employee to participate in a national health service scheme.
- Reducement Unemployment** Select this check box if, at the time of hire, the employee was classified as long-term unemployed.
- Disability Insurance** If you select the Reducement Unemployment check box, select *Deduction* or *No Ded* from the values. Use the values to indicate whether the employee has deductions for premium disability insurance (WAO).
- Premium Health Law** If you don't select the Reducement Unemployment check box, select *Deduction* or *No Ded* from the values. Use the values to indicate whether the employee has deductions for premium health care (ZW).
- Unemployment Tax** If you don't select the Reducement Unemployment check box, select *Deduction* or *No Ded* from the values. Use the values to indicate whether the employee has deductions for premium unemployment insurance (WW).

Providing Social Insurance Notification

This section discusses how to:

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

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” Administer Salaries for the Netherlands Reports

Pages Used to Provide Social Insurance Notification

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

Reporting Personal Data for New Employees to the Dutch Insurance Board

Access the Ins. Board Notification page.

Ins. Board Notification

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

Language: English

Report Request Parameters

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

Reason for Communication

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

☐ Correction

Ins. Board Notification page

Reason For Communication

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

Correction

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

Sending Notice When Employee Income Rises Above a Certain Level

Access the Insurance Notification page.

Insurance Notification

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

Language: English

Report Request Parameters

Contactperson: Telephone:

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

Reason for Communication

☒ Start
☐ End

Reason for Start

☒ Hire
☐ Transition

Reason for End

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

Insurance Notification page

Reason for Communication Identify the reason for the notification to the DNHS. Options are:

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

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

Reason for End

Enter the reason to end DNHS coverage. Options are:

Termination: Select to report an employee termination.

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

Military Service: Select if the employee enters military service.

Death: Select if the employee dies.

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

Reason for Start

Enter the reason to start DNHS coverage. Options are:

Hire: Select if the employee is a new hire.

Transition: Select if the employee is changing jobs.

Entering Employee Tax Withholdings

This section discusses how to enter wage tax data.

Page Used to Enter Employee Tax Withholdings

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

Entering Wage Tax Data

Access the Tax Data page.

Tax Data page

Tax Credits

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

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

Exception tax

Select any exceptions to the wage tax.

Tax Table Type

Select the tax table are used to determine the level of the employee's wage tax: *Green Tax Table*, *No Tax*, or *White Tax Table*.

Travel Data

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

30% Ruling (30 percent ruling)

Select if the 30 percent ruling applies to the employee, whereby 30 percent of the income is tax-free.

The 30 percent ruling applies to Dutch employees on international assignments and non-Dutch employees who are working in the Netherlands on an international assignment.

Percentage Special Tax Rate

Enter the percentage special tax rate for special tax cases.

Anonymous Rate	Select to indicate when an employee doesn't provide the documentation that is regarded as official proof of identity When this occurs, the highest tax rate (about 60 percent) is applied in order to discourage illegal immigration.
Taxable Income	Enter the employee's annual taxable income in euros (EUR). Enter a gross amount before tax deductions.

Enrolling Employees in a Benefits Program

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

Understanding Employee Enrollment in Benefits Programs and Plans

To enroll employees in benefits programs and plans:

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

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

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

2. After you are sure that the employee is placed in the correct benefits program, use the Health Benefits Election and Pension Plan Election pages to enroll the participant in all appropriate benefit within the benefit program.

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

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

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

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

See Also

[Chapter 5, “Entering Benefits and Deductions,” Enrolling Employees in Benefit Plans, page 63](#)

[Chapter 5, “Entering Benefits and Deductions,” Enrolling Employees in Pension Plans and Reviewing Benefits Information, page 65](#)

Page Used to Enroll Employees in Benefits Programs

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

Verifying Enrollment

Access the Benefit Program Participation page.

The screenshot shows the 'Benefit Program Participation' page. At the top, it displays the employee's name 'Douglas Lewis' and title 'Employee'. To the right, the 'ID' is 'KU0001' and 'Benefit Rcd Nbr' is '0'. Below this is a header bar for 'Benefit Program Participation' with navigation links 'Find | View All' and pagination 'First 1 of 1 Last'. The main form area contains three fields: '*Effective Date:' with the value '01/01/1980', '*Benefit Program:' with the value 'KU1' (which is expanded to show 'GBI Master US Benefit Program'), and 'Currency Code:' with the value 'USD'. There are also '+' and '-' buttons next to the effective date field.

Benefit Program Participation page

Benefit Program

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

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

Enrolling Employees in Benefit Plans

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

Page Used to Enroll Employees in Benefits Plans

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

Enrolling Employees and Dependents in Benefit Plans

Access the Health Benefit Elections page.

Health Benefit Elections

Antonio Santos Employee ID: KU0010 Benefit Rcd Nbr: 0

Plan Type Find | View All First 1 of 3 Last

Plan Type: 10 Medical

Coverage Find | View All First 1 of 1 Last

*Coverage Begin Date: 01/01/1999 *Deduction Begin Date: 01/01/1999

Coverage Election: ☒ Elect ☐ Waive ☐ Terminate *Election Date: 05/10/2000

Benefit Program: GBI US Pgm

Benefit Plan: KUMED1 Basic In-Network Medical Option Code: 14

Coverage Code: 4 Family

Health Provider ID: 578290482 ☒ Previously Seen

Employee Status: Active

Enroll All Dependents

Dependent/Beneficiaries Customize | 1-3 of 3

*ID	Name	Relationship	Health Provider ID	Prev Seen	Covered Person Type	Age Limit Flg
01	Megan Santos	Spouse		☐	SP	N
02	Marguerite Santos	Daughter		☐	CH	Y
03	Sean Santos	Son		☐	CH	Y

Health Benefit Elections page

Coverage

Coverage Begin Date and Deduction Begin Date

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

Coverage Election and Election Date

Define whether the employee is electing, waiving, or terminating coverage.

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

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

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

Benefit Plan

Select the benefit plan. Only the health benefit plans that you associate with the employee's benefit program as of the deduction begin date appear in the list of available options.

Coverage Code

Select the coverage code that defines the kind of coverage that the employee wants, such as *Employee Only* or *Employee + Dependents*. The coverage code is linked to the benefit plan, so only coverage codes that are defined for the selected benefit plan are available.

Health Provider ID

Enter the name of the provider ID number or any other provider-related information that the payroll system requires. Use this field to track additional information about the employee's health provider.

Dependent/Beneficiaries

ID

Select the dependent or beneficiary ID. This information is entered on the Dependent/Beneficiary page. After selecting the ID, the dependent or beneficiary's name and relationship appear.

Health Provider ID

Use this field to track additional information about the dependent's health provider. Enter the provider ID number or any other provider-related information that the payroll system requires.

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

See Also

[Chapter 5, "Entering Benefits and Deductions," Enrolling Employees and Dependents in Benefit Plans, page 64](#)

[Chapter 5, "Entering Benefits and Deductions," Enrolling Employees in a Benefits Program, page 62](#)

Enrolling Employees in Pension Plans and Reviewing Benefits Information

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

Understanding Pension Plan Enrollment

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

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

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

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

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

Enrolling Employees and Dependents in Pension Plans

Access the Pension Plan Elections page.

Pension Plan Elections

Santos, Antonio ID: KU0010

Plan Type Find | View All First 1 of 1 Last
Plan Type: 82 Pension Plan 1 - U.S.

Coverage Find | View All First 1 of 1 Last
*Deduction Begin Date: 01/01/1999
Participation Election: ☒ Elect ☐ Waive ☐ Terminate *Election Date: 05/10/2000
Benefit Program: GBI Master US Benefit Program
Benefit Plan: KUPENS GBI Pension Plan Option Code: 1

Voluntary Contributions
Flat Amount Contribution: 100.00 Or Percent of Earnings: 0.000

Salary for Pension Calculation: Employee Status: Active

Assign All Beneficiaries

Dependent/Beneficiaries Customize | 1-4 of 4

ID	Name	Relationship	Percent of Benefit	Flat Amount	Excess	Contingent
01	Santos, Megan	Spouse	25		☐	☐
02	Santos, Marguerite	Daughter	25		☐	☐
03	Santos, Sean	Son	25		☐	☐
04	Santos, Carissa	Mother	25		☐	☐

Total Primary Percent: 100
Total Contingent Percent: Update Totals

Pension Plan Elections page

Plan Type Select a plan type to identify the type of pension plan in which the employee enrolls.

Coverage

Deduction Begin Date Enter the date for employee contribution deductions to begin.

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

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

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

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

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

Establishing Employee General Deductions

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

See Also

[Chapter 3, "Setting Up Administer Salaries for the Netherlands," Understanding Deductions, page 16](#)

[Chapter 3, "Setting Up Administer Salaries for the Netherlands," Setting Up General Deduction Data, page 19](#)

Understanding Deductions

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

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

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

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

Page Used to Establish Employee General Deductions

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

Entering Data for General Deductions

Access the General Deduction Data page.

General Deduction Data

Kees den Bakker Employee ID: KN0003 Empl Rcd #: 0

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

*Deduction Code: KN0001 Staff Association Contribution

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

*Effective Date: 01/01/2001 Deduction End Date: (blank)

Deduction Calculation Routine

☒ Default to Deduction Table
☐ Flat Amount
☐ Percentage

Currency Code: EUR

Deduction Rate or %: (blank)
 Flat/Addl Amount: 6.81
 Goal Amount: (blank)

General Deduction Data page

- Deduction Code** Select the deduction code. Remember, the codes that you select from this page also need to be defined on the General Deduction table.
- Deduction End Date** Enter the effective deduction end date.
- Currency Code** Select the currency in which the funds are paid.

Deduction Calculation Routine

Although you initially specify the calculation method for general deduction on the General Deduction table, you can override these settings for an individual employee by selecting new options in this group box.

Default to Deduction Table: Select to direct the system to use as the default the calculation routine that is specified on the General Deduction table.

Flat Amount: Select to direct the system to use a flat amount method of calculation.

Percentage: Select to direct the system to use a percentage method of calculation.

Deduction Rate or % (deduction rate or percentage)

If you select Percentage enter the percentage in this field.

Flat/Addtl Amount (flat/additional amount)

If you select Flat Amount in the Deduction Calculation Routine group box, enter the amount in this field.

Goal Amount

Enter a goal amount to indicate the total cumulative amount for this deduction at which you want the deduction to stop.

Adding Employee Incidental Deductions

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

Understanding Incidental Deductions

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

Page Used to Add Employee Incidental Deductions

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

Adding Employee Incidental Deductions

Access the Incidental Deductions page.

Incidental Deductions			
Kees den Bakker		EMP	ID: KN0003 Empl Rcd #: 0
Incidental Deduction Details Find View All First 1 of 1 Last			
*Effective Date:	01/01/2001	Company:	Business Institute Netherlands
Sequence:	0	Pay Group:	
*Plan Type:	00 General	Benefit Program:	Netherlands Base Benefits
Benefit Plan:			
*Deduction Code:	KUHLTH Health Club Dues		
Amount:		Currency Code:	EUR
Rate/Pct:		Goal Amount:	275.00 ☒ OK to Pay
Begin Period:		End Period:	
Comments:			

Incidental Deductions page

Plan Type

Select the plan type, which automatically uses a default of 00 (general) because most incidental deductions are general deductions rather than benefits deductions. Other one time benefit deductions can be associated with other plan type codes.

Benefit Plan

Enter a benefit plan.

Deduction Code

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

See [Chapter 3, “Setting Up Administer Salaries for the Netherlands,” Setting Up Permanent and Incidental Deductions for Tax Purposes, page 18.](#)

Amount

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

Currency Code

Enter the currency code for the deductions.

Rate/Pct (rate/percent)

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

Goal Amount

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

OK to Pay

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

Begin Period and End Period

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

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
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 <i>receivables specialist</i> . 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 <i>detailed business process</i> .
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 <i>course</i> .
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
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 <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
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 <i>population</i> and <i>division</i> .
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 <i>communication key</i> .
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 <i>comm keys</i> or <i>speed keys</i>) 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 <i>class</i>.
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 rollout 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 <i>population</i> and <i>cohort</i>.

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 <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
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 <i>donor pyramid</i> 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 <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . 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 <i>General Ledger Interface process</i> . 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 <i>update access</i> .
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 <i>key performance indicator</i> . 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 <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . 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 <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
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 <i>learning management system</i> . 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 <i>1</i> —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 <i>3C engine</i> .
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 <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> 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	Metastings are special expressions included in SQL string literals. The metastings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	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 <i>need analysis</i> .
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 <i>compensation object</i> .
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 <i>event</i> .
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 <i>division</i> and <i>cohort</i> .
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 <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i>. See <i>record input VAT flag</i>.
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 <i>real-time event notification server</i> 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 <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . 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 <i>communication key</i> .
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 <i>basis</i> 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 <i>Communications, Checklists, and Comments engine</i> . 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 <i>Communications, Checklists, and Comments group</i> . 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 <i>locked</i>) 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 <i>inquiry access</i> .
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 <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This term refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . 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 <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . 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 <i>eXtended Process Integrator</i> . 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 <i>zero-rated value-added tax</i> . 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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