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PeopleSoft Enterprise Global Payroll for Japan 9.0 PeopleBook

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About This PeopleBook Preface

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

This preface discusses:

- PeopleSoft Enterprise application prerequisites.
- 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 elements, such as fields and check boxes, that require additional explanation. If an 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 Enterprise applications are defined in this preface.

PeopleSoft Enterprise 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 Enterprise applications.

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft Enterprise menus, pages, 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 Enterprise applications most effectively.

Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft Enterprise applications.

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 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.

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The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise applications. 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.
- Download and order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on Oracle's PeopleSoft Customer Connection website. Through the Documentation section of Oracle's PeopleSoft Customer Connection, you can download files to add to your PeopleBooks Library. You'll find a variety of useful and timely materials, including updates to the full line of PeopleSoft Enterprise documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check Oracle's PeopleSoft Customer Connection for updates to the upgrade instructions. Oracle continually posts updates as the upgrade process is refined.

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

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Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

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

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Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft Enterprise or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (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 (|).

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Typographical Convention or Visual Cue	Description
[ ] (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 Enterprise 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.

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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 Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.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.

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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.

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PeopleSoft Enterprise Global Payroll for Japan Preface

This chapter discusses:

- PeopleSoft products.
- PeopleSoft Enterprise HRMS Application Fundamentals.
- PeopleBook structure.
- Global Payroll documentation.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Global Payroll for Japan.

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 9.0 Application Fundamentals PeopleBook.* Each PeopleSoft product line has its own version of this documentation.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

PeopleBook Structure

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

The PeopleBook 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:

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Chapters	Description
Preface	This is the chapter you're reading now. It discusses: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements used in the PeopleBook, if necessary.
Getting Started With…	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • A high-level overview of how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Navigation	(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages. **Note.** Not all applications have delivered custom navigation pages.
Understanding…	(Optional) This is an introductory chapter that broadly explains the product and the functionality within the product.
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, this chapter is devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You use 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.

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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 a product, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. **Note.** There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.
Appendixes	(Optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Delivered Workflow Appendix	(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application.
Reports Appendix	(Optional) This appendix contains an abbreviated list of all of the product's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

Global Payroll Documentation

This section discusses:

- Global Payroll application design.
- Global Payroll documentation structure.
- Documentation roadmap.

Global Payroll Application Design

Because the structure of the Global Payroll documentation is similar to the design of the application, the best way to understand the documentation is to review the design of the application itself.

Global Payroll is composed of two complementary parts:

- A core payroll application that includes:
  - A payroll rules engine.

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  - A payroll processing framework.
  - Processes and setup steps that apply to all countries.
- Country extensions that include:
  - Statutory and customary objects (payroll rules, payroll processes, reports, additional country-specify pages, and self-service applications).
  - Country-specific rules and elements.

Global Payroll Documentation Structure

Like the application, the documentation for Global Payroll consists of two parts: a core book and separate country extension books.

Core Documentation

Like the core portion of the application, which applies to all countries and enables you to develop rules and process a payroll regardless of location, the core book is country neutral. Thus, while it describes the core set of tools that you can use to develop a payroll, it doesn't discuss the local country rules that have been set up for you. For information about how the PeopleSoft system has extended core capabilities to meet local requirements, refer to the country extension documentation.

Country Extension Documentation

Just as country extensions in the application address local needs, the country extensions in the documentation cover local functionality. This functionality includes:

- Any core feature with local extensions.
- Country-specific rule setup.
- PeopleSoft-delivered rules and tables.
- Country-specific pages.
- Country-specific reports.
- PeopleSoft Enterprise Human Resources Management System (PeopleSoft HRMS) setup, such as bank definitions, that varies by country.
- Implementation information that varies by country.

Documentation Roadmap

The core and the country extension documentation complement each other; therefore, it is important to read both sets of documentation.

What to Read When

You can use the documentation under these guidelines:

- If a process setup is shared between the core application and the country extension, read the core documentation first and then the country extension documentation.

  For example, banking is a feature that you first define in the core application and then often continue in the country extension, because most country extensions have some type of banking functionality. You would first read the banking chapter in the core documentation and then the banking chapter in the country extension documentation.

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- If a process is set up only in the core application, read the core documentation.
- If a process is set up only in the country extension, read the country extension documentation.

Documentation Audiences

These are the primary audiences for the documentation:

- Technical

  Technical readers who are interested in the technical design of the product should begin by reading the "Introducing the Core Application Architecture" section of the core documentation, as well as the batch processing information that is mentioned in many of the other sections.

  See *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*, "Introducing the Core Application Architecture".

- Functional

  Functional readers who are interested in defining rules should begin by reading the country-specific functionality that is described in the country extension documentation. Functional readers can continue to learn about how to use the tools in the core application by reading the sections on defining payroll elements, such as earnings and deductions, in the core documentation.

- Managerial

  Managerial readers should begin by reading the introduction sections of both the core documentation and the country extension documentation to get a high-level overview of the Global Payroll product.

Note. To fully understand Global Payroll, technical or functional persons who are involved in the product implementation should read the core documentation and the applicable country extension documentation in their entirety.

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CHAPTER 1

Getting Started with Global Payroll for Japan

This chapter discusses:

- Global Payroll for Japan overview.
- Global Payroll for Japan business processes.
- Global Payroll for Japan integrations.
- Global Payroll for Japan implementation.

Global Payroll for Japan Overview

Global Payroll for Japan delivers elements, rules, pages, processes, and reports that work with the Global Payroll core application to form a complete payroll package for Japan.

Global Payroll for Japan delivers earnings and deductions for salary and bonus for monthly exempt, monthly non-exempt, daily, and hourly pay types. You can also calculate commuting allowance in monthly payroll, adjust salaries for overtime and absence, and deduct social insurance and labor insurance premiums, income tax, and inhabitant tax as required by law. You can track paid time off and calculate year-end adjustments. You can calculate retirement allowance, set up and run the banking process, generate payslips, and process multiple job records.

See Also

Chapter 2, "Understanding Global Payroll for Japan," page 3

Global Payroll for Japan Business Processes

Global Payroll for Japan provides these business processes:

- Salary and bonus.
- Time data entry.
- Termination processing.
- Commuting allowance.
- Retirement allowance.
- Social insurance.
- Labor insurance.

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- Inhabitant tax.
- Zaikei deduction administration.
- Income tax.
- Year-end adjustment.
- Banking.
- Payslips.

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

Global Payroll for Japan Integrations

Global Payroll for Japan integrates with these applications through the core Global Payroll application:

- PeopleSoft Enterprise Human Resources.
- PeopleSoft Enterprise Time and Labor.

We discuss integration considerations in the *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook.*

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Working with Payee Data"

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Integrating with PeopleSoft Enterprise Time and Labor"

Global Payroll for Japan 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 guides, table-loading sequences, data models, and business process maps.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

Enterprise PeopleTools PeopleBook: PeopleSoft Setup Manager

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

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CHAPTER 2

Understanding Global Payroll for Japan

This chapter discusses:

- Global Payroll for Japan.
- Global Payroll for Japan business processes.
- Global Payroll for Japan integrations.
- Delivered elements.
- Element naming conventions.
- Archiving Data for Global Payroll for Japan.
- Element query.

Global Payroll for Japan

Global Payroll for Japan is a *country extension* of the core Global Payroll application. It provides the payroll rules and elements needed to run a Japanese payroll.

Global Payroll for Japan Business Processes

Global Payroll for Japan supports the following business processes:

- Salary and Bonus.

  Global Payroll for Japan provides the necessary elements to calculate earnings and deductions for salary and bonus for four pay types—monthly exempt, monthly non-exempt, daily, and hourly. Map your Global Payroll for Japan system to the base pay compensation rate codes in employees' compensation packages, and enter bonus amounts through positive input. Include commuting allowance in monthly payroll, adjust salaries for overtime and absence, and deduct social insurance and labor insurance premiums, income tax, and inhabitant tax as required by law.

- Time Data.

  Flexible rules enable tracking time data for the purpose of calculating salaries and tracking paid time off (PTO). Use variables for processing workdays, overtime, holidays, tardiness, absence, PTO, sick leave, and special leave. Use delivered formulas to track PTO entitlements, takes, and balances. Define processing of PTO that is carried over from the previous year according to your organization's practices.

- Termination processing.

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Global Payroll for Japan delivers rules and procedures that support the automatic calculation of year-end adjustment (YEA) for terminated employees.

- Commuting Allowance.

  Global Payroll for Japan provides the elements that are necessary to calculate and track payments of cash, non-cash, taxable, and nontaxable commuting allowances in frequencies of one day, one month, three months, and six months. The commuting allowance can be defined by total amount or by commuting route. The system provides a default value for the monthly maximum nontaxable commuting allowance. You can define the maximum nontaxable toll compensation for each employee and input the value of each employee's commuting allowance components. The system generates payment in the appropriate month and also tracks the value of the commuting allowance for calculating monthly remuneration.

- Retirement Allowance.

  With Global Payroll for Japan, you can enter an employee's retirement allowance and have the system automatically calculate and deduct the related income tax and inhabitant tax (prefecture tax and municipality tax) on retirement earnings. The system can also generate a withholding tax report and payslips for retirement allowances.

- Social Insurance.

  Global Payroll for Japan provides variables, formulas, earnings and deductions, and other rules to calculate and track all aspects of social insurance premiums. The system calculates health insurance premiums, pension insurance premiums, and nursing care insurance premiums. It also calculates and tracks average monthly remuneration to support the regular decision process and to identify employees who are subject to occasional revision. A set of social insurance reports helps you complete your social insurance business process.

- Labor Insurance.

  Global Payroll for Japan calculates the employee contribution for employment insurance premiums by using the appropriate premium rate for the industry type based on the employee's total wages. The system also tracks short time labor insured workers, determines exemption from employment insurance, and supports labor insurance reporting.

- Inhabitant Tax.

  Global Payroll for Japan provides rules, pages, processes, and reports that you use to prepare Wage Payment reports and summaries for municipalities, load inhabitant tax amounts received from the municipalities, deduct inhabitant tax amounts from monthly salary, and prepare monthly inhabitant tax reports for municipalities.

- Income Tax.

  Global Payroll for Japan provides rules to calculate and deduct income tax from both salary and bonus and to adjust income tax on the final payment of the year. Use the Withholding Tax Register report to meet the statutory monthly reporting requirement.

- Zaikei Deductions.

  Global Payroll for Japan provides delivered elements to support funding Zaikei savings accounts.

- Year-End Adjustment.

  The delivered rules satisfy Japanese statutory and business requirements for year-end adjustment of the final salary or bonus payment and for independent year-end adjustment, as needed. After year-end adjustments are complete, and you prepare your data tables, you can generate the necessary reports to complete the year-end adjustment business process.

- Banking.

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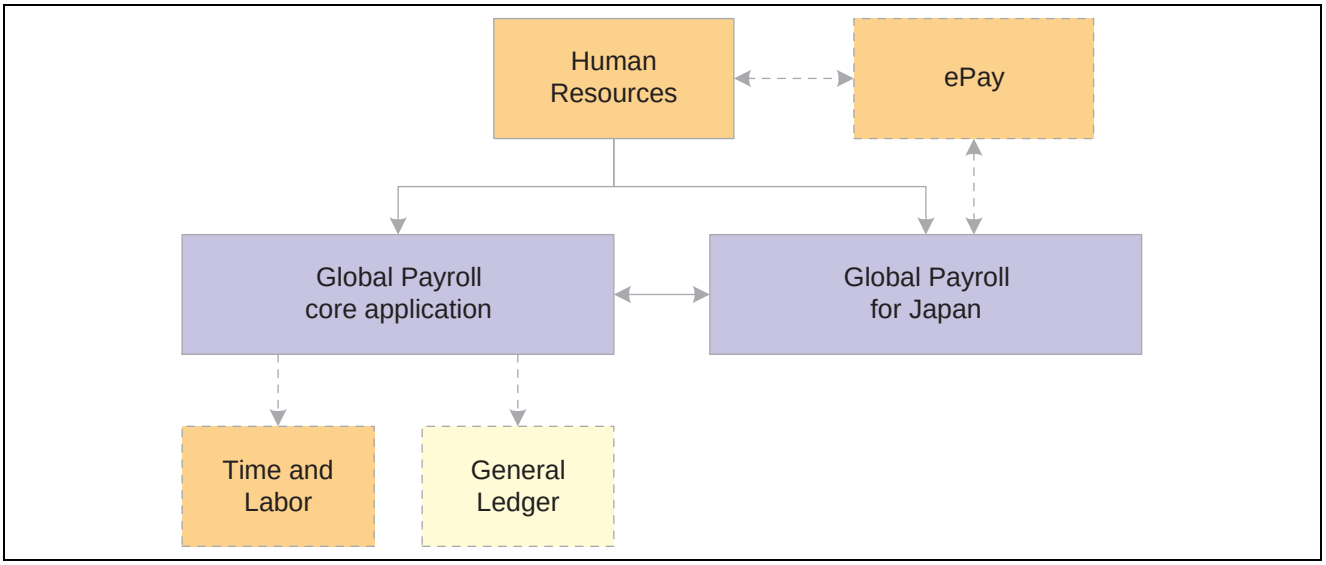
Global Payroll for Japan supports electronic transfers from multiple company accounts to multiple employee accounts. For each employee, you can define the distribution amounts to multiple banks separately for salary, bonus, independent year-end adjustment, and retirement allowance. The system provides the direct deposit file in a common format that is used by all banks in Japan.

- Payslips.

  Global Payroll for Japan enables you to print payslips for monthly salaries, bonuses, independent year-end adjustment, and retirement allowance. Because the format of payslips varies greatly from one company to another, the system provides one format as an example. The system also provides a template that enables you to configure the format to accommodate the payslip style that your organization uses.

Global Payroll for Japan Integrations

This diagram shows the applications with which Global Payroll for Japan integrates:



Global Payroll for Japan integration with other PeopleSoft applications

Delivered Elements

Global Payroll defines each business process for Japan in terms of delivered elements and rules. Some of these elements and rules are specifically designed to meet legal requirements, whereas others support common or customary payroll practices.

This section discusses:

- Delivered element creation.
- Element ownership and maintenance.

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Delivered Element Creation

All of the elements and rules delivered as part of your country extension were created using the core application—the same application that you will use to create additional elements or rules, and to configure some of the elements delivered as part of your Global Payroll system. Because the tools that you need to redefine or create new payroll elements are fully documented in the core application PeopleBook, this section does not repeat that information. Instead, this section briefly reviews the relationship between the core application (which contains the tools that you need to define your own elements and rules) and the country extensions (which contain country-specific rules and elements that are predefined in the system).

The core application has the following characteristics:

- It consists of a payroll rules engine—a flexible tool that enables users to define the rules and elements of their payroll system and execute payroll and absence calculations.

  Global Payroll does not embed payroll-specific logic or computations in application code. Instead, it specifies all business application logic, such as earnings, deductions, absences, and accumulators, in terms of payroll rules and elements. Global Payroll enables the user to enter and maintain payroll rules through a set of pages and offers a comprehensive set of features that enable users to work in their preferred language or currency.
- It provides a payroll processing framework—a flexible way to define and execute payroll and absence processing flows, such as calendars, run types, pay periods, and process lists.

Country extensions have the following characteristics:

- They are built using the core application.
- They consist of statutory and customary objects (country-specific payroll rules, elements, payroll processes, reports, pages, and self-service applications).

Element Ownership and Maintenance

The delivered elements and rules of your Global Payroll country extension can be classified based on whether they are owned and maintained by the customer or by the PeopleSoft system. Some elements and rules are maintained exclusively by PeopleSoft and cannot be modified or reconfigured, whereas others can be configured to meet requirements that are unique to your organization.

Element Ownership in Global Payroll

Global Payroll has the following five categories of element ownership:

PS Delivered/Maintained	Elements delivered and maintained on an ongoing basis by PeopleSoft.
PS Delivered/Not Maintained	Elements delivered by PeopleSoft that the customer must maintain. This category consists primarily of either customary (non-statutory) rules or statutory elements that customers may want to define according to a different interpretation of the rules. Although PeopleSoft may occasionally update elements that are defined as PS Delivered/Not Maintained, you are not required to apply these updates.
Customer Maintained	Elements created and maintained by your organization. PeopleSoft does not deliver rules that are defined as Customer Maintained.
PS Delivered/Customer Modified	Elements that were originally PS Delivered/Maintained elements, but which the customer has decided to control (this change is irreversible).
PS Delivered /Maintained/Secure	Delivered elements that the customer can never modify or control.

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Element Ownership in Global Payroll for Japan

The following table illustrates the approach to element ownership and maintenance in Global Payroll for Japan:

Functional Area	Ownership	Class
Absence and Overtime.	PS Delivered/Not Maintained.	Customary.
Commuting Allowance.	PS Delivered/Maintained.	Statutory.
Earnings—base pay items.	PS Delivered/Not Maintained.	Customary.
Earnings—other items.	PS Delivered/Not Maintained.	Statutory and Customary.
Income Tax.	PS Delivered/Maintained.	Statutory.
Inhabitant Tax.	PS Delivered/Maintained.	Statutory.
Labor Insurance.	PS Delivered/Maintained.	Statutory.
Social Insurance.	PS Delivered/Maintained.	Statutory.
Year-End Adjustment.	PS Delivered/Maintained.	Statutory.
Zaikei Deduction.	PS Delivered/Not Maintained.	Customary.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Defining General Element Information," Defining Element Names

Element Naming Conventions

Understanding the naming convention developed for PeopleSoft-delivered elements can help you determine how an element is used, the element type, and even the functional area it serves. Depending on whether the element is a primary element, a component of a primary element, or a supporting element, one of the following naming conventions applies:

- Supporting elements.
- Primary elements.
- Component names (suffixes).

This section also discusses:

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- Functional area codes for Japan.
- Element type codes (PIN_TYPE).
- Abbreviations in element names for Japan.
- Suffixes for Japan.
- Industry and regions feature.

Supporting Elements

Global Payroll for Japan uses the naming convention FF TT NAME for arrays, brackets, counts, dates, durations, formulas, rate codes, variables, historical rules, fictitious calculation rules, proration rules, rounding rules, accumulators, sections, element groups, and generation control conditions. This table explains the components of the naming convention:

FF	Functional area code.
TT	Type of supporting element.
NAME	The description of the element.

For example, in the social insurance variable SC VR MONTH REM, SC represents the functional area (Social Insurance), VR represents the element type (variable), and MONTH REM stands for monthly remuneration.

Primary Elements

Global Payroll does not use type codes in primary element names. Global Payroll for Japan uses the naming convention FF NAME for earning and deduction elements, which are primary elements. This table explains the components of the naming convention:

FF	Functional area code.
NAME	The description of the element.

For example, in the earning CM TX ALW, CM represents the functional area (commuting allowance) and TX ALW stands for taxable commuting allowance. In the earning ER BASE PAYM, ER represents the functional area (for elements related to earning contributions but not related to any other specific functional area), and BASE PAYM stands for monthly base pay.

Component Names (Suffixes)

When you create an earning or deduction element in Global Payroll, you must define the components that make up the element, such as base, rate, unit, and percentage. The system automatically generates the components and accumulators for the element based on the calculation rule or accumulator periods. The system also names the components and accumulators by appending a suffix to the element's name.

For example, you define the earning element named EARN1 with the calculation rule EARN1 = rate × unit. The system automatically creates two additional elements for the components in the calculation rule: a rate element called EARN1_RATE and a unit element called EARN1_UNIT.

In Global Payroll for Japan, all suffixes fall into one of the following types:

- Separator.
- Earnings and deductions component suffixes.
- Earnings and deductions accumulator suffixes.

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- Deduction arrears component suffixes.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Defining General Element Information"

Functional Area Codes for Japan

The following table contains the functional area codes used in the names of Japanese elements:

Functional Area Code	Description
AO	Absence and Overtime.
CM	Commuting Allowance.
ER	Earning Contributions (Used for elements that are related to earning contributions but not specifically related to another functional area.)
IH	Inhabitant Tax.
IN	Income Tax.
LA	Labor Insurance.
SC	Social Insurance.
YE	Year-End Adjustment.
ZK	Zaikei Deduction.

Element Type Codes (PIN_TYPE)

The following table contains codes for all the element types. Because not all element types are delivered for Japan, not all of these codes appear in the names of Japanese elements:

Element Type Code	Description
AE	Absence Entitlement
AT	Absence Take
AC	Accumulator

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Element Type Code	Description
AR	Array
AA	Auto Assigned
BR	Bracket
CT	Count
DT	Date
DD	Deduction
DR	Duration
ER	Earning
EG	Element Group
EM	Error Message
FC	Fictitious Calculation
FM	Formula
GC	Generation Control
HC	Historical Rule
PP	Previous Period Rule
PR	Process
PO	Proration Rule
RC	Rate Code
RR	Rounding Rule

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Element Type Code	Description
SE	Section
SY	System Element
VR	Variable

Abbreviations in Element Names for Japan

The following table lists some of the common abbreviations used in the names of Japanese elements:

Abbreviation	Description
ABS	Absence
AC	Actual Result
ADJ	Adjusted
ALW	Allowance
ANU	Annual
BAL	Balance
BON	Bonus
CD	Code
CHG	Change
CU	Current
D	Daily
DED	Deduction
DFT	Default
EST	Establishment

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Abbreviation	Description
GR or GRD	Grade
HRS or H	Hours, Hourly
JDG	Judge, evaluate, determine
M	Monthly
MON	Month
MX	Maximum
NO	Number
NOM	Normal
NX	Next
O	Occasional
PR	Previous
PRM	Premium
PTO	Paid Time Off
RED	Reduction
REM	Remuneration
RET	Retirement
R	Regular
SAL	Salary
SK L or SCLE	Sick Leave

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Abbreviation	Description
SP L or SPLE	Special Leave
STA	Standard
T	Hourly
TM	Time
TTL	Total
WRK	Work
YR	Year

Suffixes for Japan

Global Payroll for Japan uses the default core Global Payroll suffixes.

Industry and Regions Feature

The PeopleSoft system does not use the industry and regions feature in defining elements for Japan.

Archiving Data for Global Payroll for Japan

PeopleSoft Enterprise Global Payroll for Japan generates a large amount of result data. To keep the amount of saved data manageable, it can be helpful to archive it periodically. PeopleSoft PeopleTools delivers an archiving tool called the Data Archive Manager. To aid you in archiving your result data using the Data Archive Manager, PeopleSoft Global Payroll for Japan delivers a predefined archive object (GPJP_RSLT_ARCHIVE) and archive template (GPJPRSLT). The delivered archive template uses queries that select data by calendar group ID (CAL_RUN_ID field).

Note. Please use extreme caution when making changes to delivered archive objects, queries, or templates. Any modifications can result in the loss of important data.

See *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*, “Archiving Data”.

See Also

Enterprise PeopleTools PeopleBook: Data Management, Using PeopleSoft Data Archive Manager

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Element Query

PeopleSoft delivers a query that you can run to view the names of all delivered elements designed for Japan.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Viewing Delivered Elements"

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CHAPTER 3

Defining Country Data

This chapter provides an overview of Global Payroll for Japan system setup and discusses how to set up file handles.

Understanding Global Payroll for Japan System Setup

This section provides general information about how we set up the delivered elements in Global Payroll for Japan. It also provides some notes and cautions about using and configuring the system.

This section discusses how to:

- Use base pay and other PeopleSoft Enterprise Human Resources data.
- Define pay entity.
- Set up pay types.
- Set up calendar group IDs.
- Understand retroactive pay calculations.
- Use the delivered writable arrays.
- Set up monthly salary earning attributes.
- Set up bonus earning attributes.
- Set up variables for time tracking.

Using Base Pay and Other Human Resources Data

Your Global Payroll for Japan application is designed to use company data and employee personal and job data that is entered in your Human Resources application. We provide the necessary Global Payroll rules, Structured Query Reports (SQRs), and application engine programs to manage the HR data that is needed for payroll processing.

Mapping Base Pay Rate Codes

In calculating base pay, Global Payroll for Japan uses the employee's compensation package that you define using compensation rate codes in Human Resources. As sample data, we deliver three generic rate codes for Global Payroll for Japan (J08–J10) and map them to three generic base pay rate codes in HR (J08-J10). Add, remap, and modify these rate codes as required, as long as the HR rate codes that you map to have the Base Pay check box selected on the Comp Rate Code table.

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See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Defining Data Retrieval Elements," Defining Rate Code Elements

Chapter 5, "Working with Salary and Bonus," page 37

Defining Pay Entity

The pay entity is a legal definition of an organization from a payroll perspective; it is the organization that is responsible for making payments to payees. Often, the organization and the pay entity are the same. Use the Pay Entity component in the core Global Payroll application to define pay entities for your organization.

If your social insurance establishments, labor insurance establishments, and tax establishments for income tax and inhabitant tax are smaller organizations than the pay entity, define them on the Tax Establishment page described in this chapter. You must have at least one tax establishment defined for social insurance, labor insurance, income tax, and inhabitant tax even if the pay entity as defined is the same as each of these establishments.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Defining the Organizational Structure"

Setting Up Pay Types

Global Payroll for Japan uses the variable ER VR PAY TYPE to identify the employee's pay type. As delivered, the formula ER FM BASE RATE assigns the value of this variable according to the employee's compensation frequency on the Job Data Compensation record in Human Resources. Valid Human Resources compensation frequencies for Japan are:

M (monthly)	Monthly salaried employees who are not subject to overtime payment.
JM (daily-monthly)	Monthly salaried employees who are subject to overtime payment.
D (daily)	Employees who are compensated on a daily basis.
H (hourly)	Employees who are compensated on an hourly basis.

Note. You should verify that monthly salaried employees who are subject to overtime payment are assigned the JM frequency on the Job Data-Compensation page in Human Resources.

Setting Up Calendar Group IDs

Set up calendar group IDs that are meaningful to your organization and payroll processing periods. Each calendar group can have only one run type, which means that you must set up a unique calendar group ID for each regular, bonus, year-end tax adjustment, or retirement allowance pay run. As sample data, PeopleSoft provides six run types for Japan: salary, bonus, year-end adjustment on bonus, year-end adjustment on salary, independent year-end adjustment, and retirement allowance.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Using Calendars"

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Understanding Retroactive Pay Calculations

The Global Payroll for Japan application provides the necessary elements for processing retroactive changes in base salary. The following list summarizes how the application processes retroactive changes:

- The trigger for retroactive base salary processing is any change in the HR Job Data Compensation record (COMPENSATION).

  Because this record is a child of the Job Data record, changes in both the Compensation record and the Job Data record trigger retroactive processing.

- The following elements are adjusted for retroactive processing:

  ER BASE PAYM, ER BASE PAYD, ER BASE PAYH, ER OVERTIME, ER NIGHT, ER HOLIDAY, ER HOLNIG, ER TAED RED, ER SPLE RED, ER ABS RED, ER SCLE RED, SC REM S01, SC REM S02, SC REM S03, SC REM S04, SC REM S05, SC REM S06, SC REM S07, SC REM S08, SC REM S09, SC REM S10, SC REM S11, SC REM S12.

- Social insurance processing tracks retroactive changes when calculating monthly remuneration and when determining eligibility for occasional revision.

Note. When you add a retroactive data row in Human Resources records, you should place your cursor in the row of data that you want carried forward into your new row. You must manually update any existing data rows that come after your inserted row if you want your new data to be carried forward into the remaining rows of the table.

Payment Keys

Japan organizations should not use payment keys when configuring payroll for Japan.

Caution About Element Segmentation

You should not use the segmentation feature of Global Payroll. If you use segmentation, review all of your report output thoroughly for accuracy; segmentation could impact the data that is being reported.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Updating Person and Job Information"

Using the Delivered Writable Arrays

Global Payroll for Japan delivers the following writable arrays

- GPJP Writable Array (GPJP_WA).

  This array stores data that is used in PeopleSoft Application Engine and SQR programs.

- Social Insurance Salary Report Writable Array (GPJP_WA_SC_RPT_SAL).

  This array stores salary data used to create social insurance reports.

- Social Insurance Bonus Report Writable Array (GPJP_WA_SC_RPT_BON).

  This array stores bonus data used to create social insurance reports.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Defining Data Retrieval Elements"

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Setting Up Monthly Salary Earning Attributes

When you create a new earning element for Global Payroll for Japan, you must also set up the attributes. Monthly salary earnings have the following attributes:

- Taxable (or nontaxable).
- Cash (or non-cash).
- Cash remuneration (or non-cash remuneration).
- Wage.
- Fixed wage.
- Basis of overtime pay calculation.
- Basis of pay-cut calculation.

You set up these attributes by adding the earning element to the appropriate accumulators. The following table describes the attributes and their corresponding accumulators:

Attribute	Accumulator	Description
Taxable	ER AC TAX PAY SAL	Total amount of taxable salary pay.
Nontaxable	ER AC NTAX PAY SAL	Total amount of nontaxable salary pay.
Cash salary	ER AC CASH SAL	Total amount of cash salary.
Non-cash salary	ER AC NCASH SAL	Total amount of non-cash salary.
Cash remuneration	ER AC CASH REM SAL	Total amount of cash remuneration from salary.
Non-cash remuneration	ER AC NCSH REM SAL	Total amount of non-cash remuneration from salary.
Wage	ER AC TTL WAGE SAL	Total amount of salary wages.
Fixed wage	ER AC FIX WAGE SAL	Total amount of fixed salary wages.
Basis of overtime pay calculation	ER AC PRM BASE SAL	Overtime premium salary amount.
Basis of pay-cut calculation	ER AC RED BASE SAL	Reduction base salary amount.

For example, if an earning element were taxable, non-cash, remuneration, wage, fixed wage, and the basis of overtime pay calculation, you would add the element to the following accumulators: ER AC TAX PAY SAL, ER AC NCASH SAL, ER AC NCSH REM SAL, ER AC TTL WAGE SAL, ER AC FIX WAGE SAL, ER AC PRM BASE SAL.

Setting Up Bonus Earning Attributes

When you create a new bonus earning element for Global Payroll for Japan, you must also set up the attributes. Bonus earnings have the following attributes:

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Attribute	Accumulator	Description
Taxable	ER AC TAX PAY	Total amount of taxable bonus pay.
Wage	ER AC TTL WAGE BON	Total amount of bonus wages.
Cash Non-cash	ER AC CASH BON ER AC NCASH BON	Total amount of cash bonus. Total amount of non-cash bonus.
Cash remuneration Non-cash remuneration	ER AC CASH REM BON ER AC NCASH REM BO	Total amount of cash remuneration from bonus. Total amount of non-cash remuneration from bonus.

For a bonus earning, the element must be taxable and wage. You must always add the bonus earning element to the following accumulators: ER AC TAX PAY BON (total amount of taxable bonus pay), ER AC TTL WAGE BON (total amount of bonus wages). Additionally, you must add cash bonuses to ER AC CASH BON and ER AC CASH REM BON. You must add non-cash bonuses to ER AC NCASH BON and ER AC NCASH REM BO.

Setting Up Variables for Time Tracking

You must configure the delivered variables to conform to your organization's business rules. Then you can enter time data for each employee each pay period before running payroll.

Here's how you set up variables:

1. Configure variables for overtime and absence.
   - PeopleSoft delivers four variables for overtime and four variables for pay cut due to absence. You can add additional variables to track additional types of overtime or absence.
   - PeopleSoft delivers five additional variables for tracking time data, such as PTO take and compensatory day off. We also deliver a "dummy" earning for each of these variables to enter the time data through positive input.
   - Remember to create corresponding variables for the overtime premium ratio and reduction ratio.
   - If you use the variables that you added to calculate overtime pay, pay-cut for absence, or any other pay calculations, remember to create or modify formulas and other rules accordingly.
2. Change the delivered value of the variable AO VR PR PRI FLAG if your organization deducts PTO from the current year first.
3. Change the delivered value of the variable AO VR ENT MONTHS if your organization entitles PTO as of a month other than October.
4. Set up your PTO entitlement schedule.

   PeopleSoft delivers four variables for scheduling PTO entitlement according to length of service.
   - Add new variables and define rules to evaluate length of service if necessary to conform to your organization's entitlement schedule.
   - Define the amount of PTO entitlement that is associated with each variable.
   - Change the default value of the variable AO VR PTO EXP FLAG if unused PTO for the previous year expires at PTO entitlement.

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See Also

Chapter 6, “Tracking Time Data,” page 43

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, “Defining Calculation Elements”

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, “Setting Up Overrides”

Setting Up File Handles

If you plan to read and write flat files, you must set up file handles. A file handle instructs the application engine program on the file name and character set to use.

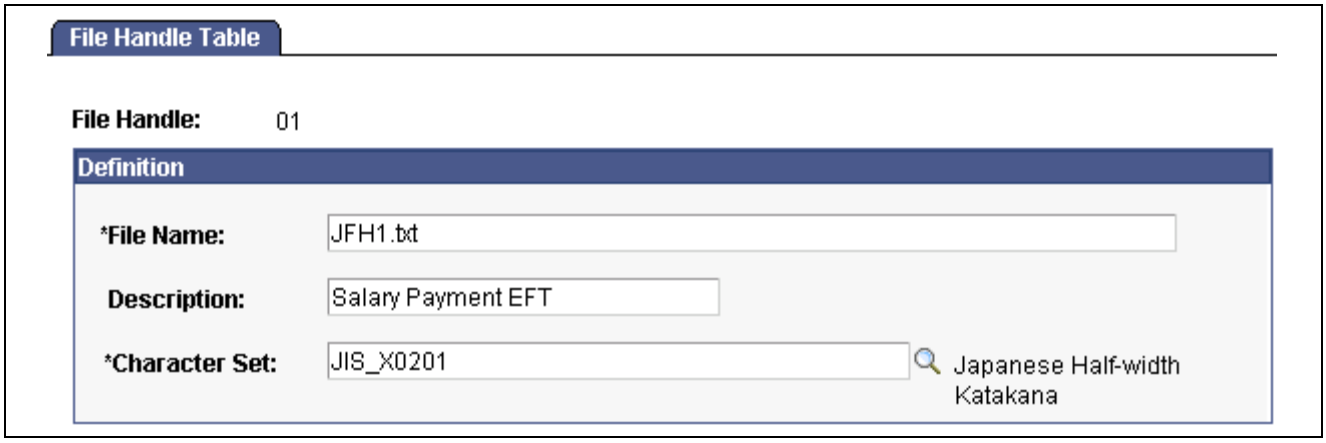
This section discusses how to assign file handles.

Page Used to Set Up File Handles

Page Name	Object Name	Navigation	Usage
File Handle Table	GPJP_FILE_HANDL	Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Reports, File Handles JPN, File Handle Table	Assign file handles. Assign a handle to each external file that you want to import or export.

Assigning File Handles

Access the File Handle Table page.



File Handle Table page

File Handle Assign a unique two-character file handle to each file that you want to import or export. The file handle can be any combination of alphanumeric characters.

File Name Enter the exact path (including file name) to the file. Use the proper syntax for your operating system.

Character Set Select the character set in which the file is imported or exported.

For file handles related to banking, select JIS_X0201.

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CHAPTER 4

Setting Up Insurance, Taxes, and Payslips

This chapter defines common tax and insurance elements and discusses how to:

- View delivered elements.
- Set up tax and insurance establishments.
- Set up for social insurance processing.
- Set up for inhabitant tax processing.
- Set up payslips.

Common Elements Used in This Chapter

Object Year	Generally refers to the year for which you want to run a process or report. Sometimes the object year is not a calendar year, as in the case of labor insurance (April 1 of the previous year through March 31 of the object year) and inhabitant tax (June 1 of the object year through May 31 of the following year).
Tax Establishment	A company or a sub-organization of a company, such as a local office, that is responsible to collect (deduct) income and inhabitant tax from employees and to pay the tax to the income tax agency and municipalities.
Salary Payer	A salary payer is defined as a tax establishment.
Salary Payer Reference Number	The number assigned to the salary payer by the income tax agency.
Taxpayer Specification Number	The number assigned to the salary payer by the municipality.
Labor Insurance Establishment	A company or a sub-organization of a company, such as a local office, that is responsible to collect (deduct) labor insurance premiums from employees and to pay the premiums to the labor insurance agencies.
Social Insurance Establishment	A company or a sub-organization of a company, such as a local office, that is responsible to collect (deduct) social insurance premiums from employees and to pay the premiums to the social insurance agencies.

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Viewing Delivered Elements

The PeopleSoft system delivers a query that you can run to view the names of all delivered elements designed for Japan. Instructions for running the query are provided in the *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Viewing Delivered Elements," Understanding How to View Delivered Elements

Setting Up Tax and Insurance Establishments

This section provides an overview of tax and insurance establishments and discusses how to:

- Define tax establishments.
- Define social insurance establishments.
- Define labor insurance establishments.

Understanding Tax and Insurance Establishments

The Tax Establishment table holds the establishment numbers assigned by the income tax, social insurance, and labor insurance agencies. These numbers might apply to your entire organization or to parts of your organization. You must set up each establishment number and provide some additional data for each before you begin to process payrolls.

This chapter discusses how to define establishment IDs. Later chapters explain how to relate these establishment IDs to individual employees.

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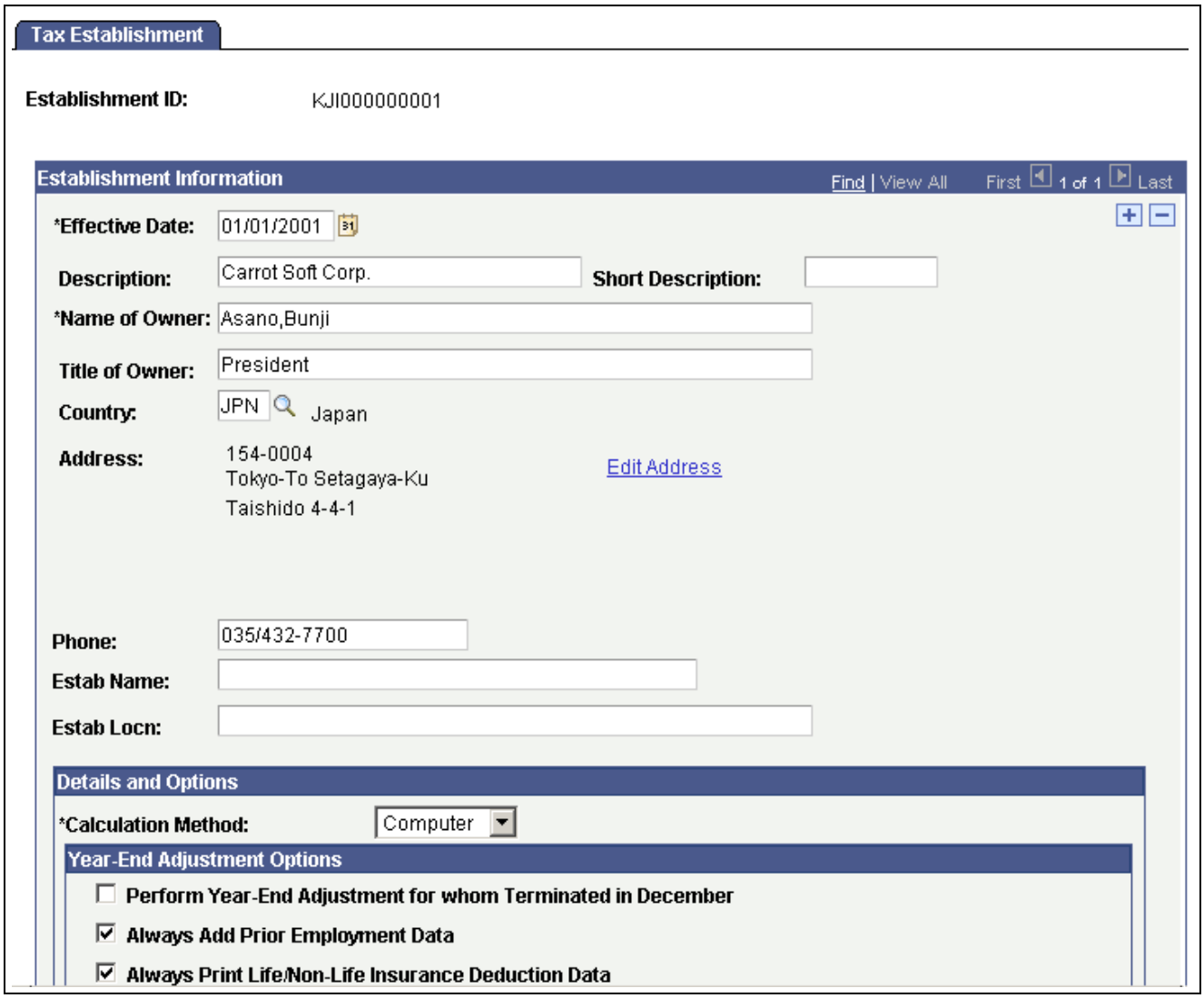
Pages Used to Set Up Tax and Insurance Establishments

Page Name	Object Name	Navigation	Usage
Tax Establishment	GPJP_TAX_ESTAB	Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Taxes, Tax Establishment JPN, Tax Establishment	Define tax establishments. Record the establishment numbers assigned to your organization by income tax agencies. Provide address and additional information related to each establishment.
Social Ins Establishment (social insurance establishment)	GPJP_TAX_ESTAB2	Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Social Security / Insurance, Social Ins Establishment JPN, Social Ins Establishment	Define social insurance establishments. Record the establishment numbers assigned to your organization by the social insurance agencies. Provide address and additional information related to each establishment.
Labor Ins Establishment (labor insurance establishment)	GPJP_TAX_ESTAB3	Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Social Security / Insurance, Labor Ins Establishment JPN, Labor Ins Establishment	Define labor insurance establishments. Record the establishment numbers assigned to your organization by the labor insurance agency. Provide address and additional information related to each establishment.

Defining Tax Establishments

Access the Tax Establishment page.

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Tax Establishment page

Salary Payer Data

Calculation Method Select whether this salary payer (income tax establishment) calculates income tax by the computer calculation or tax table lookup method when an employee's income tax type is KOU. Valid values are *Computer* and *Table.*

Perform Year-End Adjustment for whom Terminated in December The default setting for this check box is cleared. Select this check box if your organization's policy is to perform the Year-End Adjustment for the payees who were terminated before the payment date in December.

Always Add Prior Employment Data The default setting for this check box is selected. If you clear this check box, the system does not include the sum of salary, withheld tax, the deducted Social Insurance premiums by the previous employer with the sum of those amounts from the current employer, if the payee was judged not-subject to Year-End Adjustment.

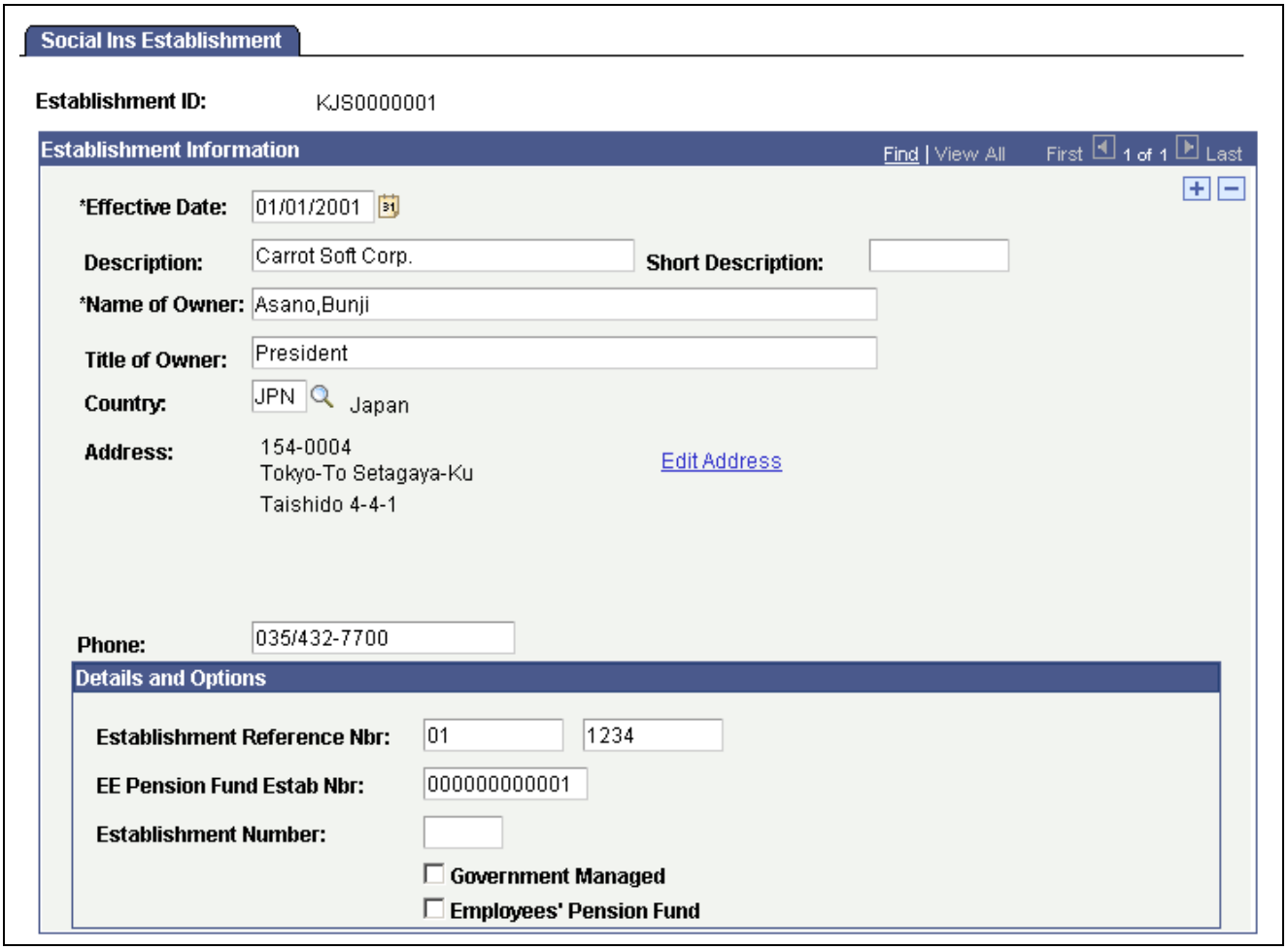
Always Print Life/Non-Life Insurance Deduction Data The default setting for this check box is selected. If you clear this check box, the system does not print Life/Non-Life insurance deduction data on the

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Withholding Tax Report, if the payee was judged not-subject to Year-End Adjustment.

Defining Social Insurance Establishments

Access the Social Ins Establishment page.



Social Ins Establishment page

Social Insurance Establishment Data

Establishment Reference Nbr (establishment reference number) — Enter the number assigned to the establishment by the social insurance agency. This value is used for reporting purposes.

EE Pension Fund Estab Nbr (employee pension fund establishment number) — Enter the number assigned to this establishment by the employee pension fund.

Establishment Number — Enter the establishment number assigned by the government.

Government Managed — Select this option to indicate that members of this social insurance establishment have government managed health insurance.

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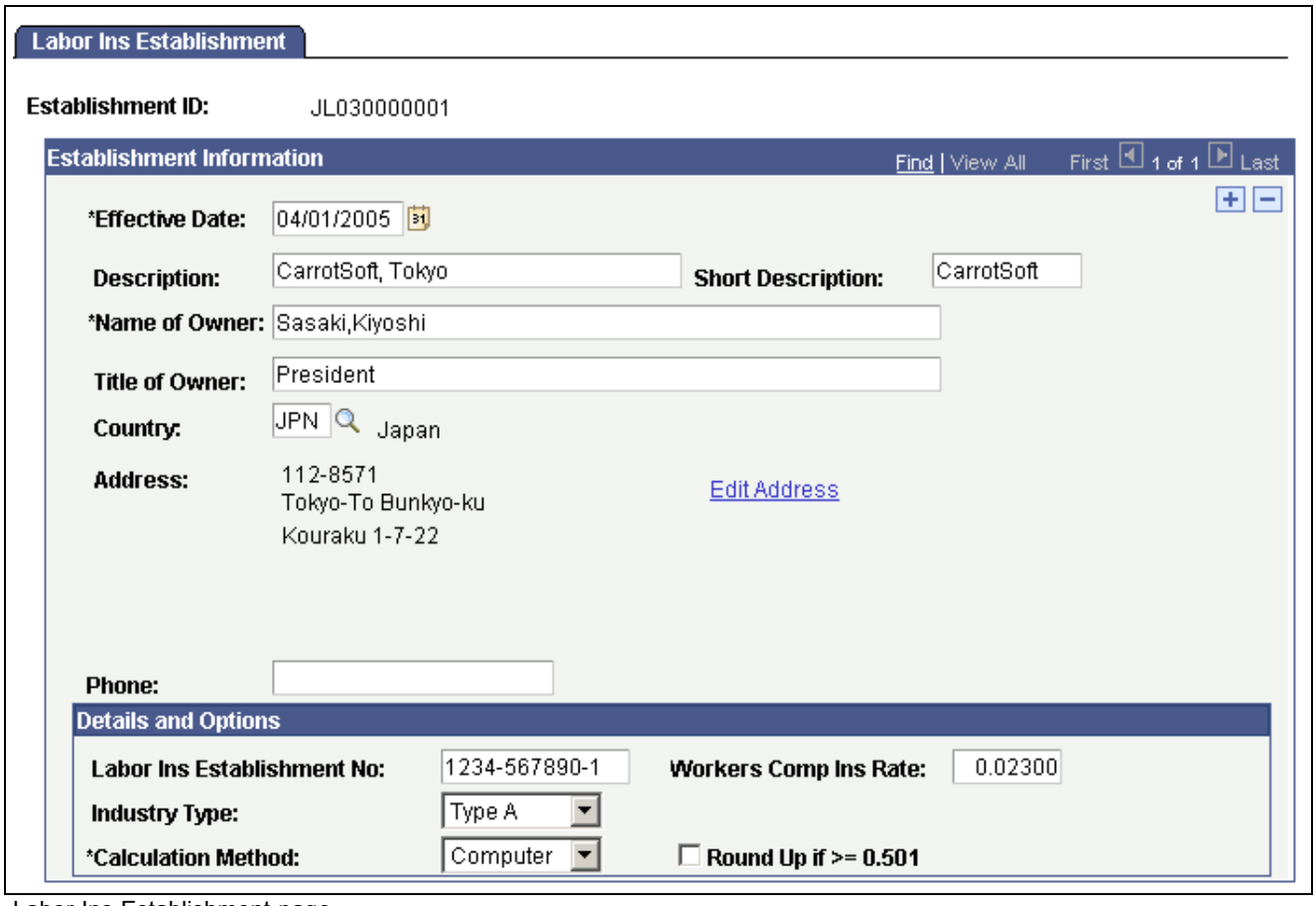
When this option is selected and the payee has data on the social insurance dependent data table (GPJP_SC_DEP_DTA), the system will trigger a flag on the Enrollment report indicating that the Health Insurance Dependent report should be submitted.

Employees' Pension Fund Select this option to indicate that the members of this social insurance establishment are enrolled in the employee pension fund.

This field, in addition to the payee's sex, determines the type used for various SI reports.

Defining Labor Insurance Establishments

Access the Labor Ins Establishment page.



Labor Ins Establishment page

Establishment Information

Title of Owner Enter the establishment owner's title. This value is used for reporting purposes.

Details and Options

Labor Ins Establishment No Enter the labor insurance establishment number for your establishment.

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Calculation Method Select whether this labor insurance establishment calculates labor insurance by the computer calculation or table lookup method. Valid values are *Computer* and *Table.*

Industry Type Select whether this labor insurance establishment is a *Type A*, *Type B*, or *Type B(Cs)* (construction) industry.

Workers Comp Ins Rate Enter the worker compensation insurance rate.

Round Up if >= 0.501 The default setting for this check box is cleared. If this check box is cleared, the system discards the fraction in the employment insurance premium regardless of the fraction amount. If you select this check box, the payee's contribution to employment insurance is rounded up if the fraction is greater than or equal to 0.50; it is rounded down if the fraction is less than 0.501

Setting Up for Social Insurance Processing

This section lists a prerequisite and discusses how to:

- View standard remuneration grades.
- Set up social insurance premium rates.

See Also

Chapter 11, "Managing Social Insurance," page 81

Prerequisite

Before setting up social insurance premium rates, you must define social insurance establishments.

See Chapter 4, "Setting Up Insurance, Taxes, and Payslips," Setting Up Tax and Insurance Establishments, page 22.

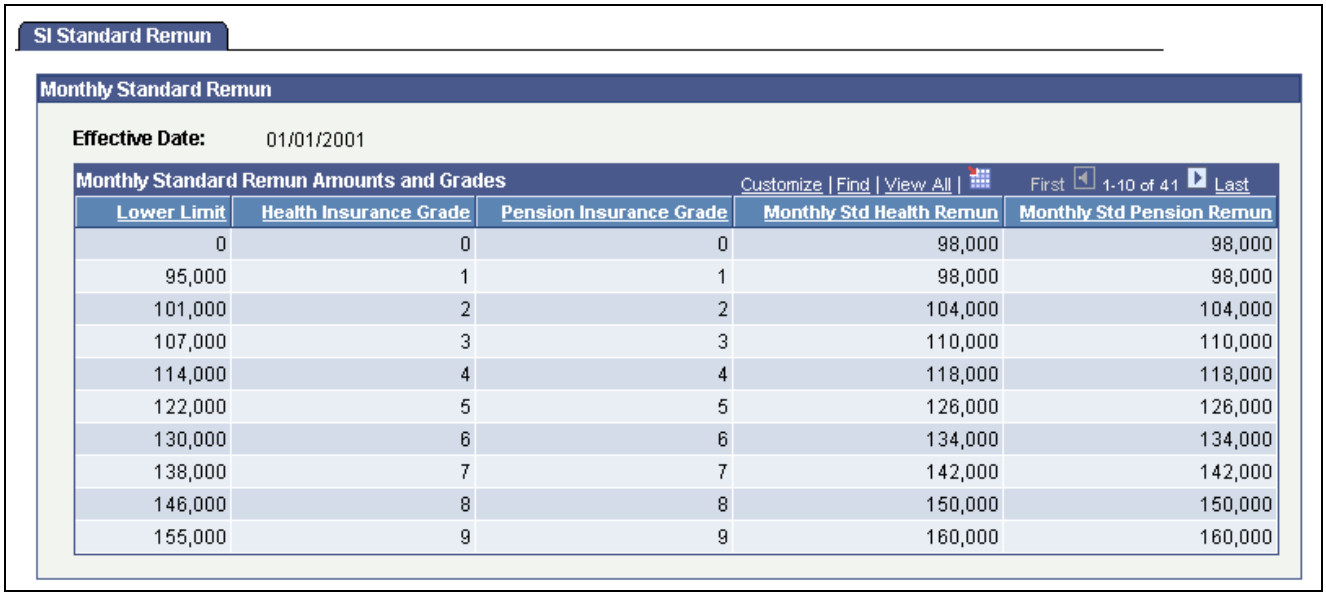
Pages Used to Set Up Social Insurance Data

Page Name	Object Name	Navigation	Usage
SI Standard Remun (social insurance standard remuneration)	GPJP_SC_STD_REMUN	Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Social Security / Insurance, Rvw SI Std Remun Grades JPN, SI Standard Remun	View the values and grades on the Monthly Standard Remuneration table.
SI Premium Rates (social insurance premium rates)	GPJP_SC_EST_DATA	Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Social Security / Insurance, SI Premium Rates JPN, SI Premium Rates	Set up social insurance premium rates. Enter the social insurance premium rates for each social insurance establishment.

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Viewing Standard Remuneration Grades

Access the SI Standard Remun page.



SI Standard Remun

Monthly Standard Remun

Effective Date: 01/01/2001

Monthly Standard Remun Amounts and Grades — Customize | Find | View All | First 1-10 of 41 Last

Lower Limit	Health Insurance Grade	Pension Insurance Grade	Monthly Std Health Remun	Monthly Std Pension Remun
0	0	0	98,000	98,000
95,000	1	1	98,000	98,000
101,000	2	2	104,000	104,000
107,000	3	3	110,000	110,000
114,000	4	4	118,000	118,000
122,000	5	5	126,000	126,000
130,000	6	6	134,000	134,000
138,000	7	7	142,000	142,000
146,000	8	8	150,000	150,000
155,000	9	9	160,000	160,000

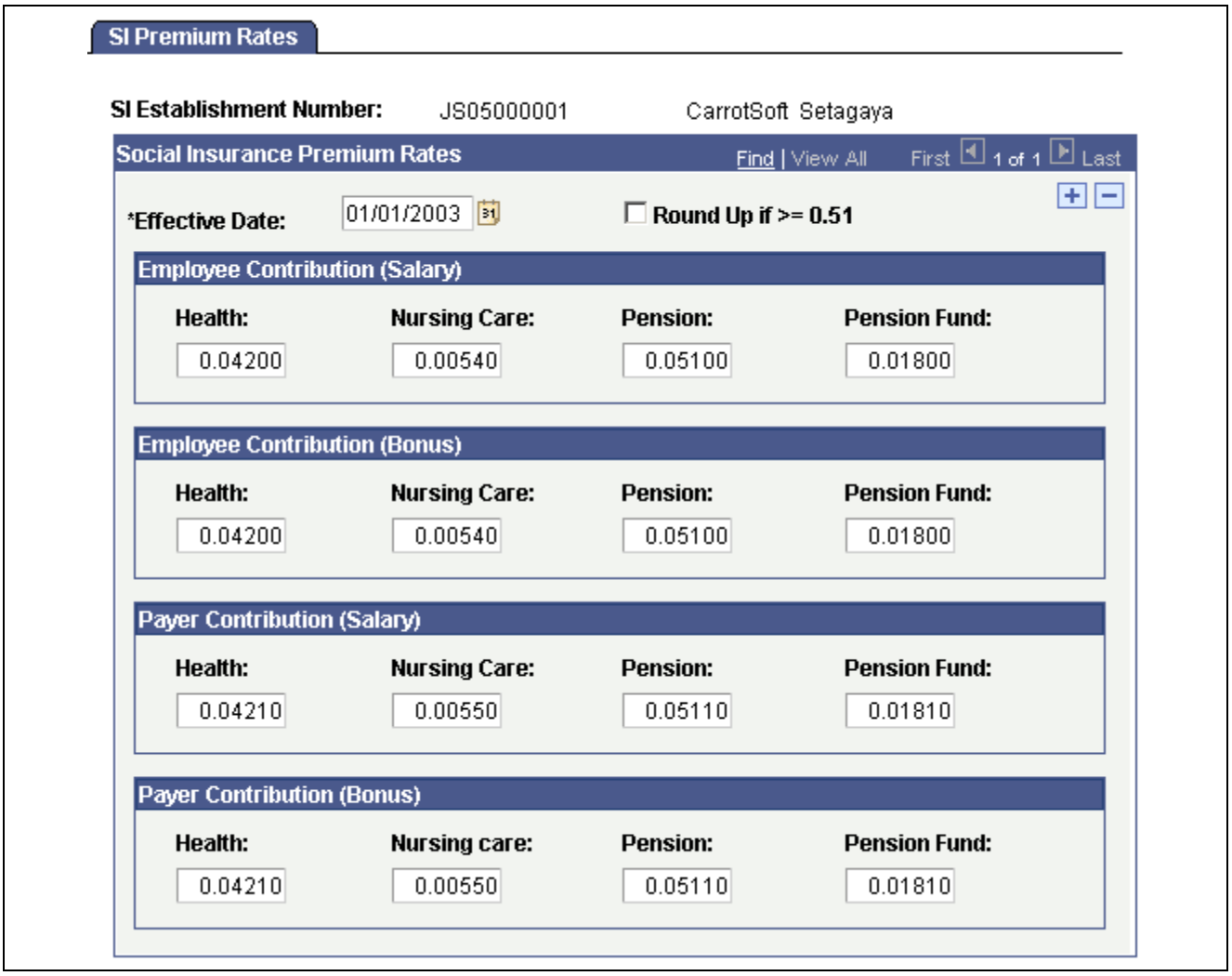
SI Standard Remun page

View the information on the Monthly Standard Remuneration table, which the system uses to determine an employee's monthly standard remuneration amount and the grade for health insurance and pension insurance premium calculations.

Setting Up Social Insurance Premium Rates

Access the SI Premium Rates page.

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SI Premium Rates page

Enter the premium rates used to calculate employee and payer contributions for salary and bonus payments.

Round Up if >= 0.51 If this check box is selected, the payee's contribution to social insurance is rounded up if the fraction is greater than or equal to 0.51. If the check box is cleared, the amount is rounded up if the fraction is greater than or equal to 0.6.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Defining Calculation Elements"

Setting Up for Inhabitant Tax Processing

This section provides an overview of the setup for inhabitant tax processing and discusses how to:

- Associate municipality codes with salary payers.
- Associate municipality codes with postal codes.

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Understanding the Setup for Inhabitant Tax Processing

Here's how you set up for inhabitant tax processing:

1. Associate municipality codes with tax establishments and taxpayer specified numbers on the Municipality Table page.
2. Associate municipality codes with postal codes on the Postal Code Table page.
3. Define a file handle for each municipality's electronic file that you want to load directly into the PeopleSoft Inhabitant Tax table.

   Use the File Handle Table page.

   You do not have to do this step if you load inhabitant tax amounts manually.

See Also

Chapter 13, "Managing Inhabitant Tax," page 119

Chapter 3, "Defining Country Data," Setting Up File Handles, page 20

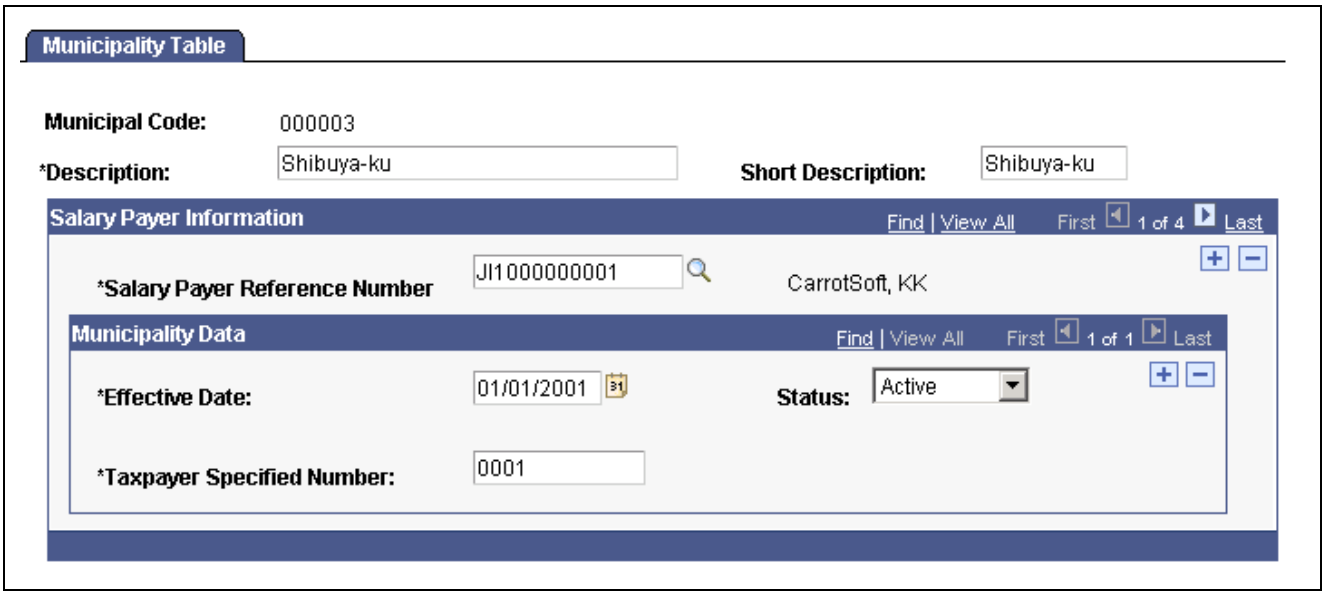
Pages Used to Set Up Inhabitant Tax

Page Name	Object Name	Navigation	Usage
Municipality Table	GPJP_IH_MUNIC	Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Taxes, Municipality Table JPN, Municipality Table	Define municipality codes and associate them with salary payers. For each salary payer, record the taxpayer-specified number assigned by the municipality.
Postal Code Table	POSTAL_TBL_JPN	Set Up HRMS, Install, Product and Country Specific, Postal Codes JPN, Postal Code Table	Associate municipality codes with postal codes.
File Handle Table	GPJP_FILE_HANDL	Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Reports, File Handles JPN, File Handle Table	Assign a handle to each external file that you want to import or export.

Associating Municipality Codes with Salary Payers

Access the Municipality Table page.

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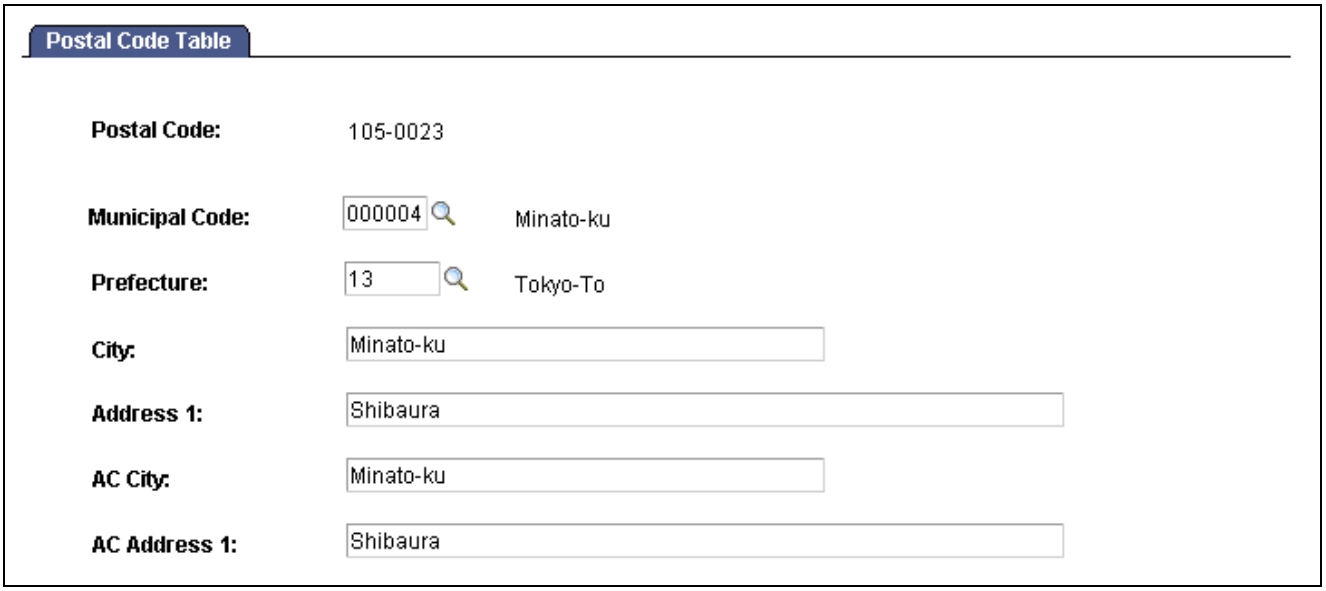
Municipality Table page

Salary Payer Reference Number Select each income tax establishment associated with this municipality.

Taxpayer Specified Number Enter the number assigned by the municipality to the salary payer for special collection.

Associate Municipality Codes with Postal Codes

Access the Postal Code Table page.



Postal Code Table page

Municipal Code Select the municipal code to associate with this postal code.

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Setting Up Payslips

This section provides an overview of payslip setup and discusses how to:

- Define payslip positions.
- Define payslip templates.
- Associate payslip templates with pay groups.

See Also

Chapter 18, "Generating Payslips," page 177

Understanding Payslip Setup

Global Payroll for Japan enables you to set up payslips to accommodate variations that you may need for your organization.

Here's how you set up payslips:

1. Define the data element positions on your payslip forms by using the Payslip Position Listing page.

   The PeopleSoft system delivers a list of positions but does not maintain it. You can add positions if necessary.

2. Define payslip templates on the Payslip Templates page.

   Specify which element to display in which position on each template.

3. Assign payslip templates to pay groups and run types on the Payslip Pay Groups page.

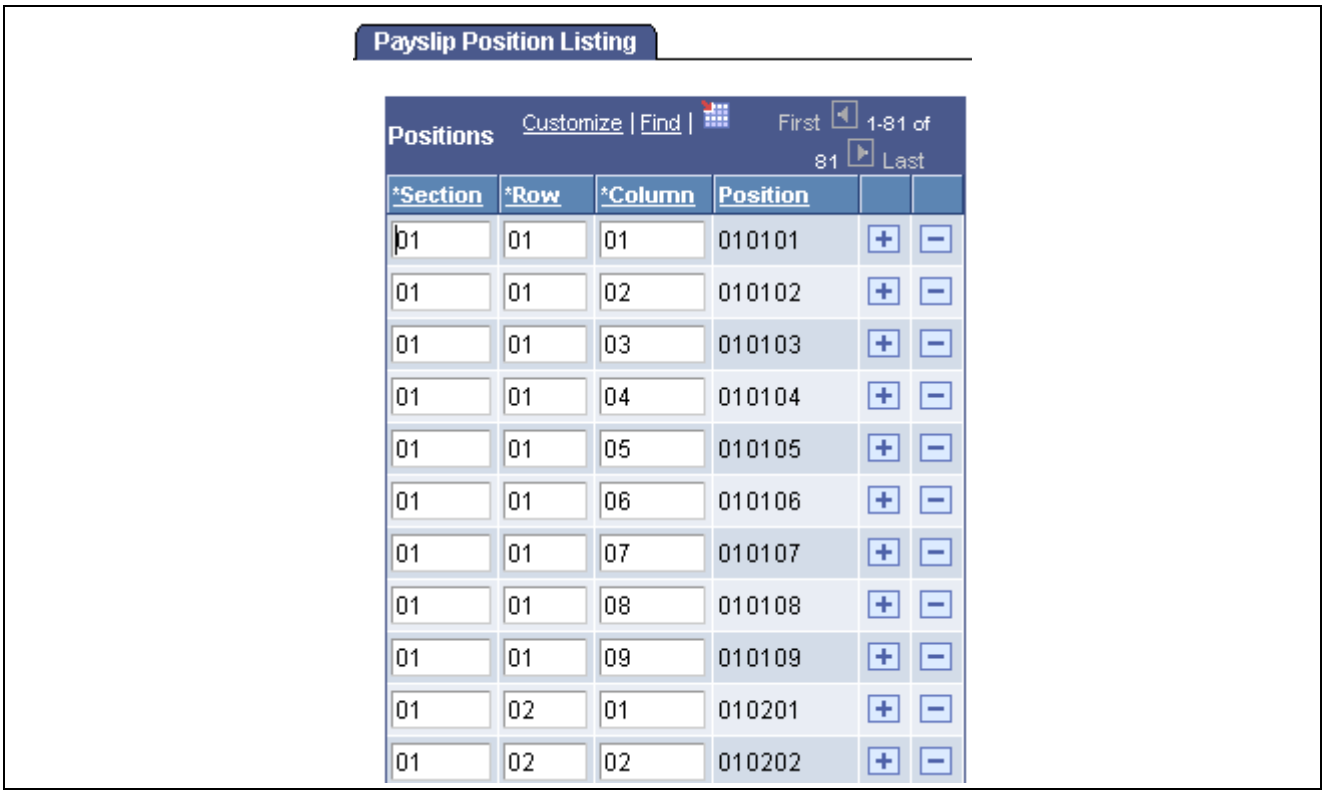
Pages Used to Set Up Payslips

Page Name	Object Name	Navigation	Usage
Payslip Position Listing	GPJP_PP_POSVAL	Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Payslips, Template Positions JPN, Payslip Position Listing	Define payslip positions. View and define all possible data positions on a payslip form or template by section, row, and column.
Payslip Template	GPJP_PP_TEMPLATE	Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Payslips, Templates JPN, Payslip Template	Define templates to use in printing payslips.
Payslip Pay Group	GPJP_PP_PAYGROUP	Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Payslips, Link to Pay Group JPN, Payslip Pay Group	Associate pay groups and run types with payslip templates.

Defining Payslip Positions

Access the Payslip Position Listing page.

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Payslip Position Listing page (partial)

Section The number of the payslip section. For example, you might have separate sections for time data, earnings, deductions, and payments.

Row The horizontal row of data within the section. The first row for a section is always *01*.

Column The vertical column of data. For each row, the columns are numbered *01* through *09*.

Position The concatenated section, row, and column. For example, position *010203* represents the position in the third column in the second row of the first section.

Adding Positions

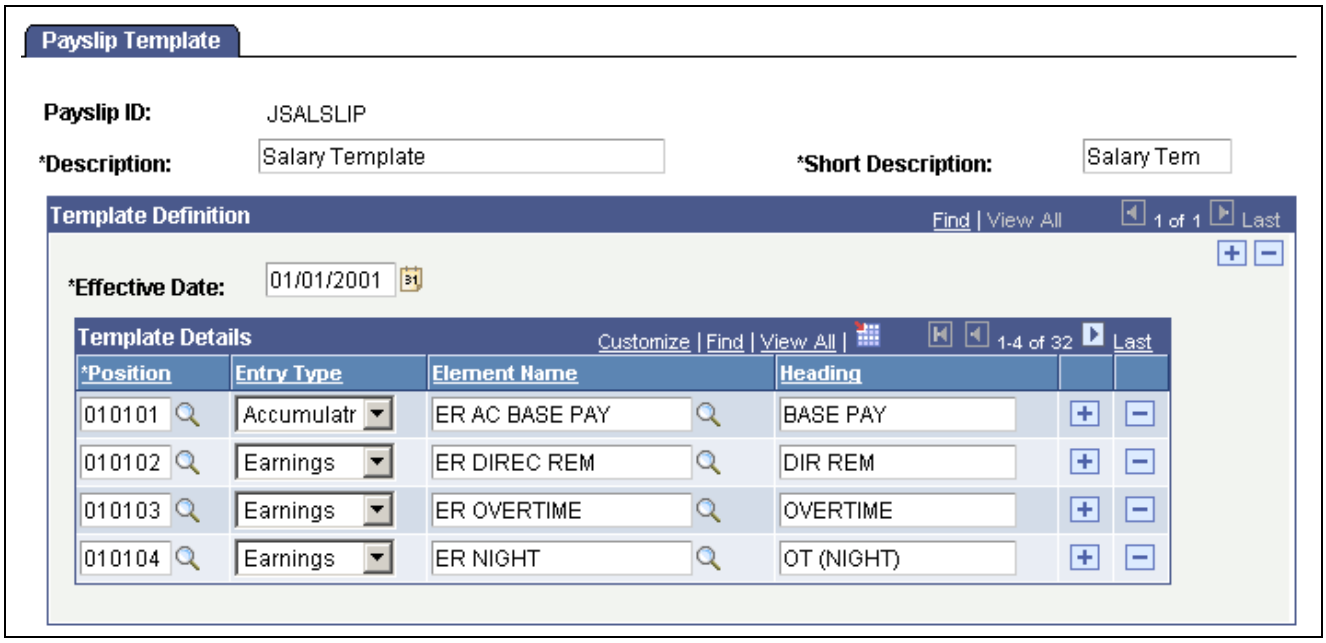
The PeopleSoft system delivers a list of positions. Add positions by entering two-digit numbers in the Section, Row, and Column fields. You must add a row of data for each position. The system completes the Position field after you save the page or click Refresh.

Note. You can delete positions, but to maintain flexibility we recommend that you do not.

Defining Payslip Templates

Access the Payslip Template page.

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Payslip Template page

Payslip ID The identifier of the template that you're defining.

Short Description If you do not enter a short description, the system enters the first 10 characters of the Description field when you save the page.

Template Details

Position Select the position of a field on your payslip form.

Entry Type Select the type of element that you want to appear in the position: *Earning, Deduction, Accumulator,* or *Variable.*

The report displays only the last value of a variable if the system encounters segmentation or slicing. Therefore, you must store any values that you want summed into an accumulator.

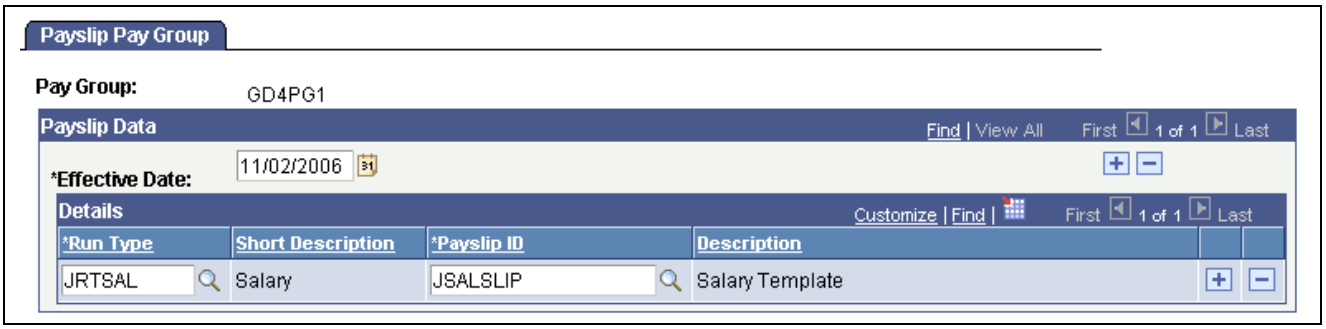
Element Name Select from the elements that are valid for the element type that you selected.

Heading Specify the label for this data on the payslip. If you do not enter a heading in this field, the system prints the first 10 characters of the element name in this field and on the payslip.

Associating Payslip Templates with Pay Groups

Access the Payslip Pay Group page.

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Payslip Pay Group page

Pay Group The pay group that you select when you enter the page. If you want a group of payees to have their own unique payslip templates, you must define them as a unique pay group. The system cannot generate payslips for a pay group if it does not have an entry in this page.

Run Type Add a row for each run type. The system cannot generate payslips for a run type if it does not have an entry in this page.

Payslip ID For each run type, select the payslip template to use when printing payslips.

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CHAPTER 5

Working with Salary and Bonus

This chapter provides an overview of salary and bonus rules and discusses how to:

- Set up for salary processing.
- Report earnings and deductions.
- View delivered salary and bonus elements.

Understanding Salary and Bonus Rules

The delivered rules for determining salary and bonus satisfy Japanese statutory and business requirements. This section reviews some of the requirements and discusses in general terms how the rules satisfy them. Separate chapters discuss additional earnings and deductions that affect employee take-home pay.

This section provides an overview of:

- Base pay setup.
- Overtime pay.
- Pay cut due to absence.
- Bonus.
- Earning accumulators.

Base Pay Setup

In calculating base pay, Global Payroll for Japan uses the employee's compensation package that you define by using compensation rate codes in PeopleSoft Enterprise Human Resources. The base pay rate formula (ER FM BASE RATE) gathers the employee's base pay rate codes, converts them to the frequency of the employee's pay type, and sums them to determine the value of the base pay rate variable (ER VR BASE RATE).

Base pay is calculated differently depending on the employee's pay type. If the employee's pay type is daily or hourly, the system also uses time data when calculating base pay. Enter time data each month on Global Payroll Positive Input pages.

See Also

Chapter 3, "Defining Country Data," page 15

Chapter 6, "Tracking Time Data," page 43

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Overtime Pay

You define the value of the variables for overtime premium amounts and overtime premium ratios. The system calculates the employee's overtime base unit, and then calculates overtime pay according to the amount of overtime that you enter for the employee.

The system provides variables for the following overtime premium ratios:

- Regular.
- Holiday.
- Late night.
- Holiday late night.

Note. Japanese labor law specifies that the number of work hours per day be equal to or less than eight. Employees who work more than eight hours on any day are paid overtime. The premium for overtime must be at least 25%. In cases where employees work more than the scheduled number of hours, but less than the legal hours, the company may decide whether to pay overtime with a premium or not. Overtime pay without a premium is not supported by the PeopleSoft application.

See Also

Chapter 3, "Defining Country Data," page 15

Pay Cut Due to Absence

You define the value of the variables for reduction base amounts and reduction ratios. The system calculates the employee's reduction base unit, and then calculates the pay cut based on the amount of absence time that you enter for the employee.

The system provides variables for the following reduction ratios:

- Tardy arrival and early departure.
- Special leave.
- Absence.
- Sick leave.

Bonus

The system delivers the bonus earning element (ER BONUS). Use positive input to enter each employee's bonus amount into this element.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Working with Positive Input"

Earning Accumulators

For purposes of taxation and insurance premiums, accumulators track the following amounts of each employee's salary and bonus:

- Taxable.
- Nontaxable.

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- Cash.
- Non-cash.
- Remuneration subject to social insurance premium.
- Wages subject to labor insurance premium.

Additional accumulators track other details and totals of pay.

Setting Up for Salary Processing

You must enter some data into the system before you calculate salaries for employees whose pay types are other than *Monthly:*

1. Map compensation rate codes that are set up in Human Resources to the Global Payroll Japan rate codes.
2. Enter or update the default value of the variables for calculating overtime pay and pay cut due to absences on the Variable by Category page.

   This table lists the delivered variables and the corresponding category that are used to access the Variables by Category page:

Variable	Description	Category
ER VR WRK DAYS YR	Annual number of workdays.	Overtime Premium Reduction Base Information
ER VR WRK HRS DAY	Fixed working hours per day.	Overtime Premium Reduction Base Information
ER VR OVR PRM RAT	Overtime premium ratio for regular overtime.	Overtime Premium Rate
ER VR HOL PRM RAT	Overtime premium ratio for holiday overtime.	Overtime Premium Rate
ER VR NIG PRM RAT	Overtime premium ratio for late night overtime.	Overtime Premium Rate
ER VR HOLN PRM RAT	Overtime premium ratio for holiday late night overtime.	Overtime Premium Rate
ER VR TAED RAT	Absence reduction ratio for tardy arrival and early departure.	Reduction Ratio

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Variable	Description	Category
ER VR SPLE RAT	Absence reduction ratio for special leave.	Reduction Ratio
ER VR ABS RAT	Absence reduction ratio for absence.	Reduction Ratio
ER VR SCLE RAT	Absence reduction ratio for sick leave.	Reduction Ratio

3. Override the default value of the variables at any level necessary on the override page for the appropriate supporting element.
4. Enter each employee's time data for overtime and absence through positive input.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Defining Data Retrieval Elements," Defining Rate Code Elements

Chapter 3, "Defining Country Data," Setting Up Pay Types, page 16

Chapter 6, "Tracking Time Data," page 43

Reporting Earnings and Deductions

Global Payroll provides a generic report that you can configure to list earnings and deductions for each employee.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Setting Up and Running Generic Reports"

Viewing Delivered Salary and Bonus Elements

Global Payroll for Japan delivers earnings and process lists to calculate salaries and bonuses.

Salary and Bonus Earnings

This table lists the salary and bonus earnings:

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Earning	Description
ER BASE PAYM	Base pay (monthly).
ER BASE PAYD	Base pay (daily).
ER BASE PAYH	Base pay (hourly).
ER OVERTIME	Regular overtime allowance.
ER NIGHT	Late night working allowance.
ER HOLIDAY	Holiday working allowance.
ER HOL NIG	Holiday late night working allowance.
ER TAED RED	Pay cut due to tardy arrival and early departure (negative earning).
ER SPLE RED	Pay cut due to special leave (negative earning).
ER ABS RED	Pay cut due to absence (negative earning).
ER SCLE RED	Pay cut due to sick leave (negative earning).
ER BONUS	Bonus.

Salary and Bonus Process Lists

This table lists the salary and bonus process lists:

Process List	Description
JPRSAL	Regular salary payroll process.
JPRBON	Regular bonus payroll process.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, “Viewing Delivered Elements”

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Viewing Delivered Elements

The PeopleSoft system delivers a query that you can run to view the names of all delivered elements designed for Japan. Instructions for running the query are provided in the *PeopleSoft Enterprise Global Payroll 9 PeopleBook*.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Viewing Delivered Elements," Understanding How to View Delivered Elements

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CHAPTER 6

Tracking Time Data

This chapter provides an overview of time data rules and discusses how to:

- Prepare to enter time data.
- Enter time data.
- Report time data.

Understanding Time Data Rules

The delivered rules for processing time data satisfy Japanese statutory and business requirements. This section discusses:

- Overtime and absence time variables.
- Paid time off (PTO).
- Delivered elements.

Overtime and Absence Time Variables

Global Payroll for Japan delivers variables for entering various types of overtime and absence. If your organization tracks additional types of overtime or absence, you can create additional variables.

In each pay period, enter the time data for each employee prior to running payroll.

See Also

Chapter 6, "Tracking Time Data," Entering Time Data, page 44

PTO

Following is a summary of the rules regarding PTO entitlement, carryover, and take.

PTO Entitlement

PTO entitlement rules are:

- The PeopleSoft system provides a set of variables and formulas for a schedule of entitlement.

  You can redefine the delivered elements and add additional variables and formulas to accommodate the entitlement schedule in your organization.

- *October* is the delivered value for the month when PTO is entitled.

  You can redefine this variable or override the value at the pay entity, pay group, or payee level.

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PTO Carryover

PTO carryover rules are:

- Accumulators separately track balances of PTO that was earned in the previous and current years.
- An expiration indicator variable (AO VR PTO EXP FLAG) determines whether unused PTO in the previous year is expired when PTO is carried over.

  The delivered value is *Yes;* unused previous year PTO is expired at the time of PTO entitlement.

  - If the value of the variable is *Yes,* unused PTO in the previous year is deleted (expired) and only the current year's unused PTO is carried into the new entitlement period as previous year unused PTO.
  - If the value of the variable is *No,* unused PTO in the previous year is accumulated with the current year's unused PTO, and both are carried into the new entitlement period as previous year unused PTO.

PTO Take

A priority indicator variable (AO VR PR PRI FLAG) determines whether to first take the current year PTO or PTO carried over from entitlement in the previous year. The delivered value is set to take PTO entitled in the previous year first. You can redefine the delivered value or override the value at the pay entity or pay group level.

Viewing Delivered Elements

The PeopleSoft system delivers a query that you can run to view the names of all delivered elements designed for Japan. Instructions for running the query are provided in the *PeopleSoft Enterprise Global Payroll 9 PeopleBook*.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Viewing Delivered Elements," Understanding How to View Delivered Elements

Preparing to Enter Time Data

You must configure the delivered variables to conform to your organization's business rules. Then you can enter time data for each employee each pay period before running payroll.

Entering Time Data

Enter employees' time data as positive input. If you're entering data for many employees, you can speed the process by using the Positive Input by Template page.

Here's how you enter time data by using templates:

1. Set up templates for entering time data on the Positive Input Template page.
   - Set up more than one template if you need more than six elements of time data.
   - Use the same templates each pay period or change them as necessary.

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2. Enter time data for each employee in a pay group and calendar ID on the Positive Input by Template page.

   Associate a template with the pay group and calendar ID when you enter the page.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Working with Positive Input"

Reporting Time Data

Global Payroll provides a generic report that you can configure to list time data and PTO balance for each employee.

See Also

Appendix A, "Global Payroll for Japan Reports," Running Generic Global Payroll Reports for Japan, page 188

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CHAPTER 7

Processing Terminations

This chapter provides an overview of termination processing and discusses how to:

- Process terminated employees.
- Create the Withholding Tax report for terminated employees.

Understanding Termination Processing

The PeopleSoft system delivers rules and procedures that support the automatic calculation of year-end adjustment (YEA) for employees terminated by reason of death.

The termination judge formulas (YE FM YEA ELIG for regular salary, YE FM ELIG BON for regular bonus, and YE FM ELIG YE for December salary and bonus) determine the following:

1. When the payee has been terminated.

   Whether a payee who is subject to payroll calculation is terminated during the current pay period.

   YE FM YEA ELIG determines if the employee has been terminated during the current pay period. YE FM ELIG BON and YE FM ELIG YE determine if the employee has been terminated as of the payment date.

   This decision is based on whether the employee's Job record has the action *TER* (terminated) as of the Period End date if the Payroll is for Salary, or, as of the Payment date if the Payroll is for Bonus or December salary. .

2. Whether the payee is subject to YEA calculation at the time of the last payment calculation.

   This determination is based on whether the employee's Job record with action *TER*, selected in the previous step, also has the reason *DEA* (death).

   Note. You can modify formulas YE FM YEA ELIG, YE FM ELIG BON and YE FM ELIG YE to add additional reason codes if you want the system to automatically calculate YEA for employees who are terminated for reasons other than death, such as international transfer.

When the formula YE FM YEA ELIG or YE FM ELIG BON or YE FM ELIG YE returns the value *1,* indicating that the payee qualifies for YEA calculation, the system processes the YEA calculation sections in the salary and bonus process lists. These sections are initial process of YEA (YE SE INIT), and YEA on salary payment (YE SE TAX ADJ SAL) or YEA on bonus payment (YE SE TAX ADJ BON).

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Viewing Delivered Elements

The PeopleSoft system delivers a query that you can run to view the names of all delivered elements designed for Japan. Instructions for running the query are provided in the *PeopleSoft Enterprise Global Payroll 9 PeopleBook*.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Viewing Delivered Elements," Understanding How to View Delivered Elements

Processing Terminated Employees

This section discusses how to:

- Insert termination Job records.
- Maintain year-end data of terminated employees.
- Process payroll.

Inserting Termination Job Records

The termination Job record must be inserted before the payee's last payment is processed.

For example, an employee's last day is May 10, and the pay period of her last payment is from April 16 through May 15. The payroll is processed on May 20. In this example, before her last payment is processed on May 20, you must enter her termination Job record with an effective date of May 11.

Maintaining Year-End Data of Terminated Employees

Follow the standard procedures for entering tax, dependent, and YEA deduction information for the terminated employee.

See Also

Chapter 16, "Preparing Year-End Adjustment," page 153

Processing Payroll

You do not have to take any special action to process payroll for terminated employees. If the employee is terminated during the pay period by reason of death, the system automatically processes YEA salary calculations.

For bonuses, the system determines if the payee is dead as of the payment date. YEA calculations are made if the date of death is before or on the payment date.

You can modify the rules to automatically process YEA for other termination reasons, as well.

See Also

Chapter 7, "Processing Terminations," Understanding Termination Processing, page 47

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Creating the Withholding Tax Report for Terminated Employees

This section discusses how to:

- Load YEA report data for terminated employees.
- Review YEA report data and update the Submit to Tax Office indicator.
- Print the Withholding Tax report for terminated employees.

Pages Used to Create the Withholding Tax Report for Terminated Employees

Page Name	Object Name	Navigation	Usage
Load YEA Report Data	GPJP_RC_YEALOAD	Global Payroll & Absence Mgmt, Termination Processing, Load YEA Report Data JPN, Load YEA Report Data	Run the process to load YEA data for terminated employees.
YEA Report Data	GPJP_YEA_TABLE	Global Payroll & Absence Mgmt, Termination Processing, Rvw/Update YEA Report Data JPN, YEA Report Data	View results of the YEA Data Load process for terminated employees. View data and update the Submit to Tax Office indicator and Summary field.
W/H Tax Report (withholding tax report)	GPJP_RC_YEAWHRPT	Global Payroll & Absence Mgmt, Termination Processing, Withholding Tax Report JPN, W/H Tax Report	Print the Withholding Tax report for terminated employees. If the final payment for the employee included year-end processing (termination due to death), then the Withholding Tax report shows the result of YEA.

Loading YEA Report Data for Terminated Employees

Access the Load YEA Report Data page.

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Load YEA Report Data page

Note. This page is similar to the Load YEA Report Data page that is accessed through the Year-End Processing menu path. To load YEA data for terminated employees, you must access the page through the Termination Processing menu path. The system compares the termination date with different dates depending upon the type of payment being made. For salary, the system compares the termination with the period end date. If the termination occurs before the period end date, the system considers the employee terminated. For bonus, the system considers the employee terminated if the effective date occurs before the payment date.

Calendar Group ID Select the calendar group ID of the final salary or bonus payment.

Business Unit, Department, and EmplID, are optional parameters that you can use to create YEA report data for terminated employees who belong to a specific business unit or department, or for a specific employee.

Reviewing YEA Report Data and Updating the Submit to Tax Office Indicator

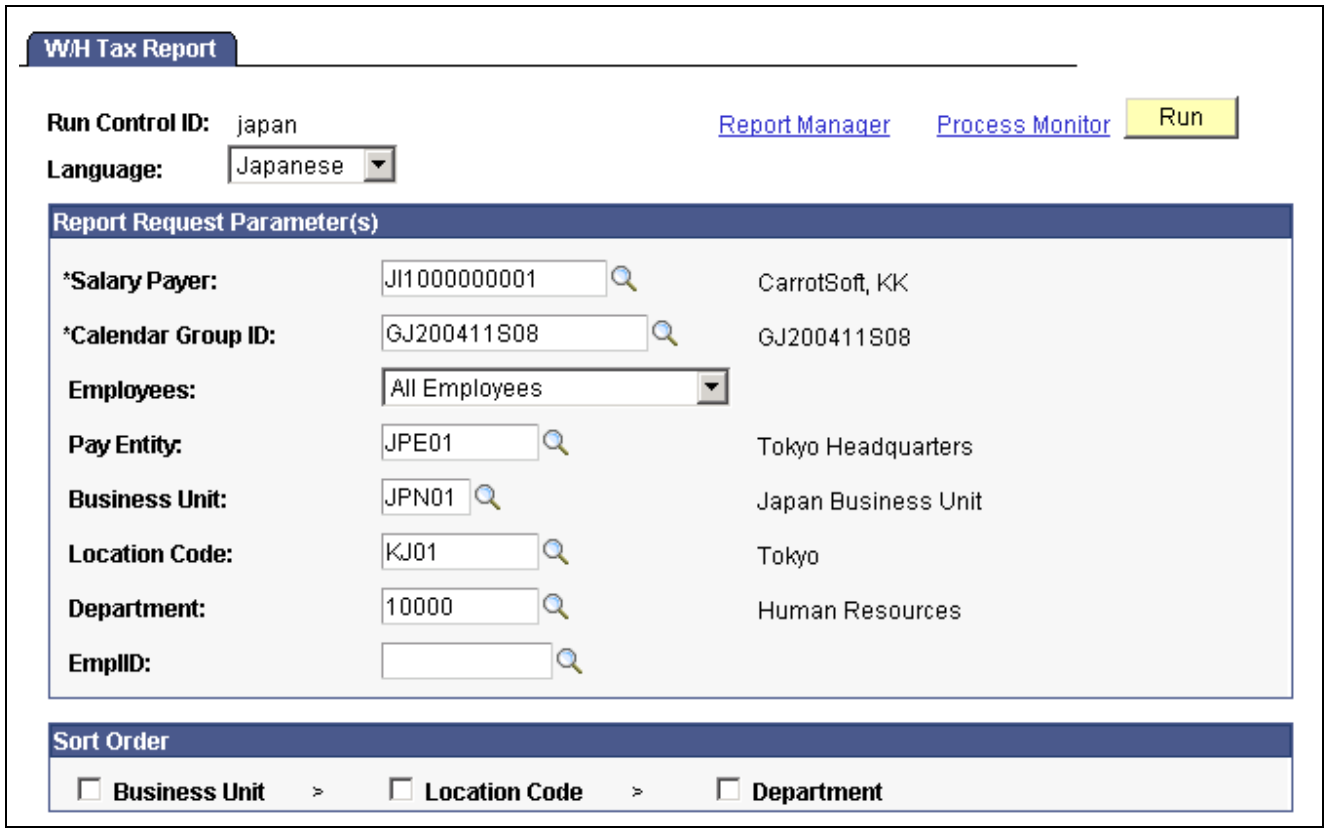
Access the YEA Report Data page.

See Chapter 16, "Preparing Year-End Adjustment," Viewing and Updating the YEA Report Data Table, page 164.

Printing the Withholding Tax Report for Terminated Employees

Access the W/H Tax Report page.

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W/H Tax Report page

Note. This page is similar to the W/H Tax Report page that is accessed through the Year-End Processing menu path. To print the Withholding Tax report for terminated employees, you must access the page through the Termination Processing menu path.

Calendar Group ID Select the calendar group ID of the final salary or bonus payment.

Employees Select whether to print the report for all terminated employees or only those with Submit to Tax Office selected on the YEA Report Data page.

Pay Entity, Business Unit, Location, Department, and EmplID, are optional parameters that you can use to narrow the selection to a group of terminated employees or a specific employee.

The Sort Order group box enables you to sort the report by business unit, location code, and department.

Note. You must run the Load YEA Report Data process before printing this report.

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CHAPTER 8

Managing Unemployment Certificates and Wage Certificates at 60

This chapter provides an overview of certificates for unemployment and wages at age 60 and discusses how to:

- Load Unemployment Certificate data.
- Review and update Unemployment Certificate data.
- Create the Unemployment Certificate.
- Load the Wage Certificate at 60 data.
- Review and update Wage Certificate at 60 data.
- Print the Wage Certificate at 60.

Understanding Unemployment Certificates

Terminated employees can request that the company submit an Unemployment Certificate on their behalf to the appropriate job security office. In return, the agency sends an Unemployment Report to the company, which it must then pass to the employee.

Note. Not all job security offices accept printed Unemployment Certificates, preferring a manually completed form. It is your responsibility to determine whether the Unemployment Certificate can be printed.

The certificate comprises three sections. The first section contains the header and personal and labor insurance establishment information. The second section contains the employee's payment history. The third section describes the reasons for termination.

With Global Payroll for Japan, you can:

- Add a row to the Job record for the termination of an employee.

  Note. The effective date on the termination Job record must be the first day that the employee was unemployed.

- Load the Unemployment Certificate data.
- Review and update Unemployment Certificate data.
- Create an Unemployment Certificate.

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Viewing Delivered Elements

The PeopleSoft system delivers a query that you can run to view the names of all delivered elements designed for Japan. Instructions for running the query are provided in the *PeopleSoft Enterprise Global Payroll PeopleBook*.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Viewing Delivered Elements," Understanding How to View Delivered Elements

Loading Unemployment Certificate Data

This section provides an overview of the Unemployment Certificate load process and discusses how to:

- Load Unemployment Certificates.
- Optionally, define the payee list.

Understanding the Unemployment Certificate Load Process

Global Payroll for Japan provides a process to retrieve information for creating the Unemployment Certificate. Some of this information is stored in the results tables for Global Payroll. Other parts of this information must be entered manually or retrieved from a company's time management system, which may be PeopleSoft Enterprise Time and Labor or a third-party time management system.

An intermediate table called the Unemployment Certificate Data table has been created so that the system can store both the information that is loaded from the results tables for Global Payroll and information that is stored outside of the results tables.

The load process extracts the wage history data of terminated employees from the calculation results data for Global Payroll and loads the history data into the intermediate report table.

Note. Wage history data are automatically loaded by the Load Unemployment Certificate Data process and can be updated manually afterward. When you want to reload the data, you can keep the manually updated data.

For the Unemployment Certificate process, the system:

1. Selects the employee ID, employment record number, and termination date.
2. Identifies the corresponding hiring date.
3. Selects Global Payroll Calendar IDs that are subject to the Unemployment Certificate.
4. Finds the dates when the employee changed from a short-time worker to a non-short time worker, or vice versa, if applicable.

   This information is necessary because the length of payment history information that is required on the Unemployment Certificate depends on the worker type.
5. Creates a list of appraisal period begin and end dates.
6. Calculates values to be loaded to the Unemployment Certificate Data table by calendar ID.
7. Loads the data into the Unemployment Certificate Data table.

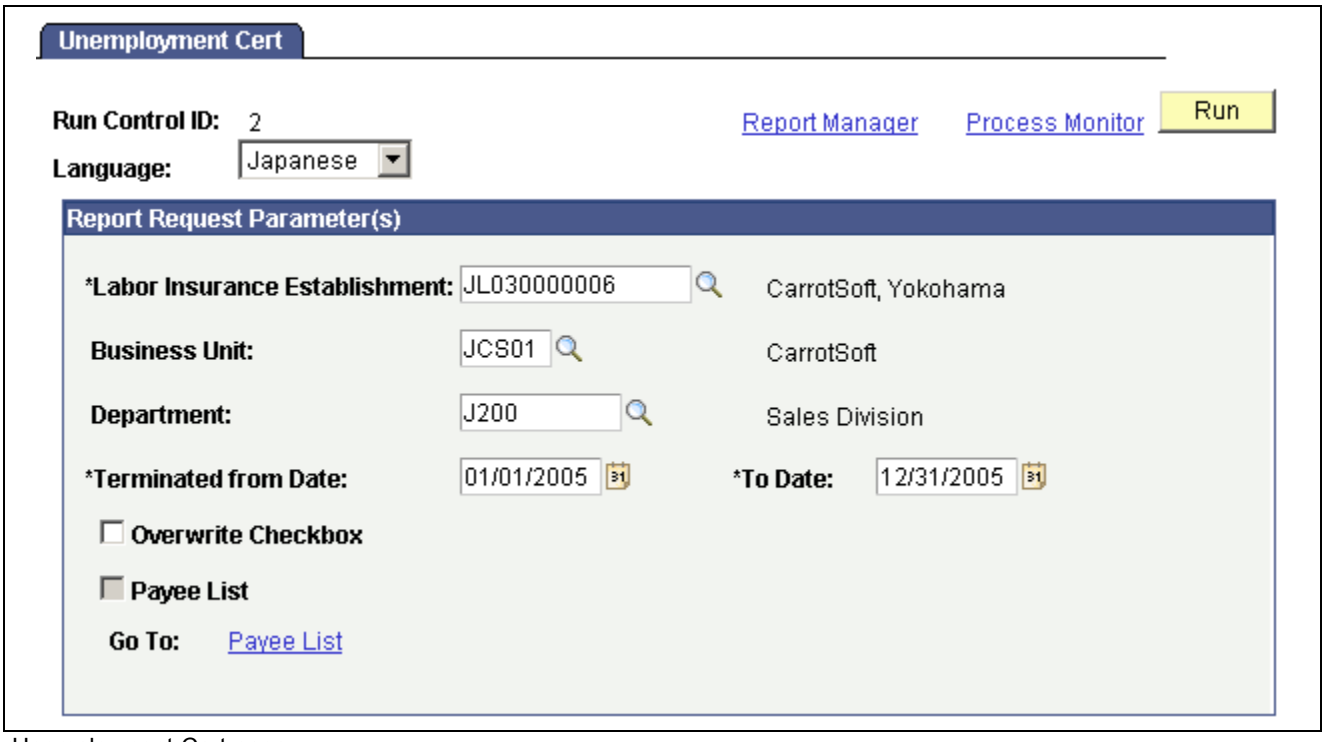
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Pages Used to Load Unemployment Certificate Data

Page Name	Object Name	Navigation	Usage
Unemployment Cert (unemployment certificate)	GPJP_RC_UC_LOAD	Global Payroll & Absence Mgmt, Termination Processing, Load Unemployment Cert JPN, Unemployment Cert	Load payroll and work-time information for the generation of the Unemployment Certificate.
Payee List	GPJP_RC_UC_SEC	Click the Payee List link on the Unemployment Cert page.	Select the payees to be included on the Unemployment Certificate.

Loading Unemployment Certificates

Access the Unemployment Cert page.



Unemployment Cert page

Labor Insurance Establishment Enter the labor insurance establishment for the employee.

Business Unit Optionally, enter a business unit.

Department Optionally, enter a department.

Terminated from Date and **To Date** Employees whose termination dates fall into this period you specify are included in the report.

Overwrite Checkbox Wage history dates are automatically loaded by the Load Unemployment Certificate Data process and can be manually updated. When you want to reload the data, you can keep the manually updated data. Select the check box if you want the load process to overwrite all data, including data that is updated

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manually. When you run the load process more than once for an employee, manually updated data will be deleted if you select this check box.

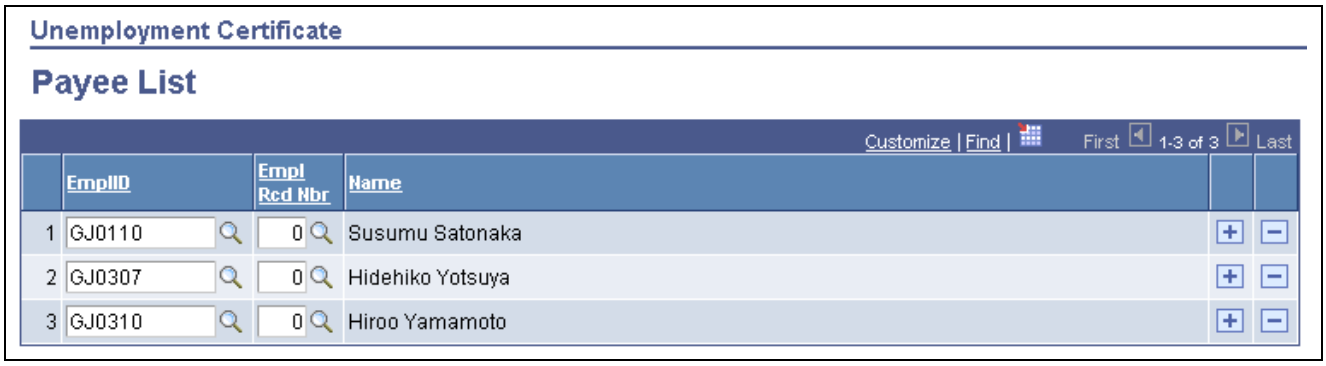
Note. The load process always overwrites Wage History data that was loaded previously by the process (not updated manually) with the latest calculation results data for Global Payroll regardless of the status of the Overwrite Checkbox field.

Payee List Click this link to access the list of payees that will be included on the Unemployment Certificate.

If the Payee List check box is selected, one or more employee IDs has been entered on the Payee List secondary page. If this check box is cleared, no employee ID is entered on the Payee List secondary page.

Defining the Payee List

Access the Payee List page.



Payee List page

EmplID Select the employee IDs for the payees to be included on the Unemployment Certificate. The employees who are listed on the Payee List must meet the criteria that is defined on the Unemployment Cert page. This means that the employees who are on the Payee List must belong to the labor insurance establishment and pay entity that are specified on the Unemployment Cert page and must have been terminated between the dates entered in the Termination From Date and To Date fields.

Reviewing and Updating Unemployment Certificate Data

This section provides an overview of Unemployment Certificate data updates and describes how to:

- Enter wage payment history.
- Enter reason of termination.

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Understanding Unemployment Certificate Data Updates

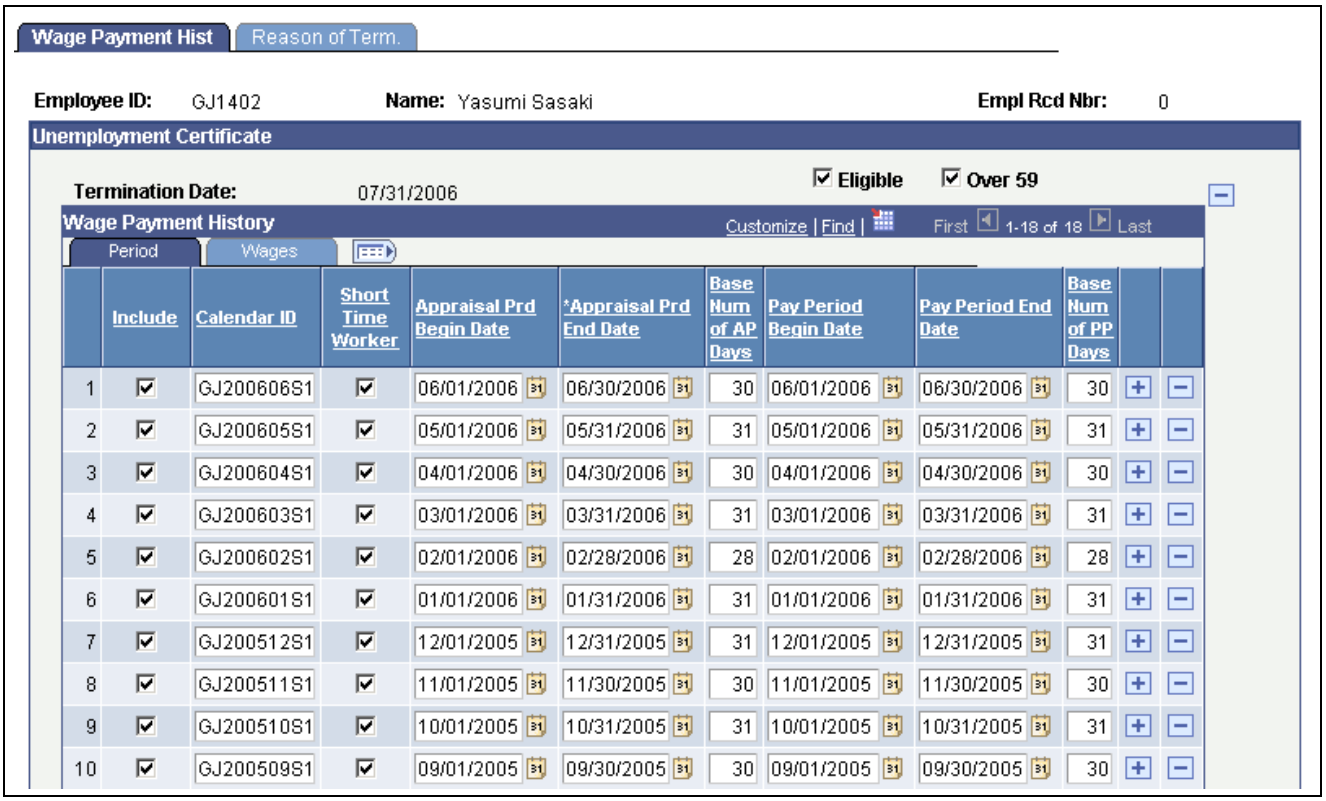
The load process creates the wage history information that is required for the Unemployment Certificate. However, this is only one part of the information that is required for the certificate. You also need to enter the terminated employees' personal information, such as reason for termination. You can enter this information in the Update Unemployment Cert JPN component. In this component, you can also enter wage history information for the employee, if necessary.

Pages Used to Update Unemployment Certificate Data

Page Name	Object Name	Navigation	Usage
Wage Payment Hist (wage payment history)	GPJP_UC_WPMT_HIST	Global Payroll & Absence Mgmt, Termination Processing, Update Unemployment Cert JPN, Wage Payment Hist	Enter and view information about wage payment history.
Reason of Term (reason of termination)	GPJP_UC_RSN_TERM	Global Payroll & Absence Mgmt, Termination Processing, Update Unemployment Cert JPN, Reason of Term	Enter and view information about reason of termination.

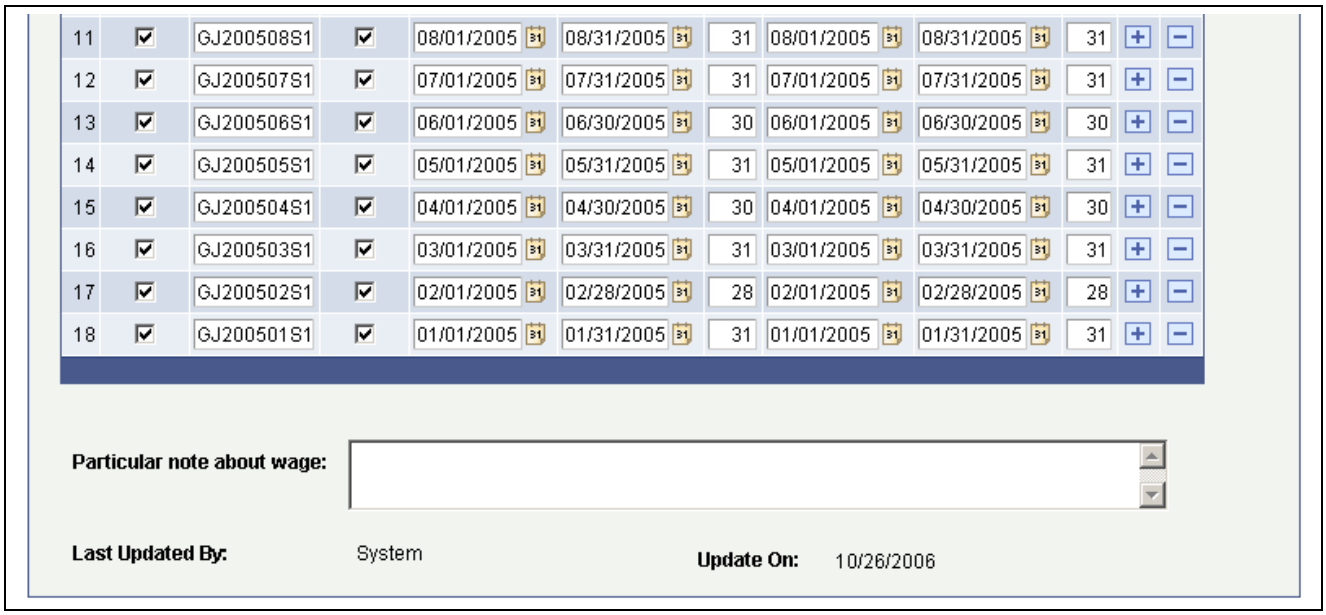
Entering Wage Payment History

Access the Wage Payment Hist page.



Wage Payment Hist page (1 of 2)

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Wage Payment Hist page (2 of 2)

Note. You can access multiple Unemployment Certificate entries for an employee in the first scroll area of the Unemployment Certificate group box, above the Eligible field.

Termination Date The system displays the date that the employee was terminated.

Note. You cannot change the termination date on this page; however, a work around is available if you find an incorrect termination date. See the subsequent field description for the Delete button for instructions on how to change the termination date for an employee.

Eligible Clear this check box if you want to keep the Unemployment Certificate data for a specific employee, but don't want to print the certificate. Eligible is the default value.

Over 59 The system automatically selects this check box if it validates that the payee is over 59 years old during the Load Unemployment Certificate Data process. When the check box is selected, you must submit the report to the Job Security Office regardless of the payee's request.

Delete If you find that the Termination Date of the Unemployment Certificate data is incorrect, click the Delete button. Then correct the employee's Termination Date on the Job record. After that, run the Load Unemployment Certificate Data process for the employee again.

Note. You cannot keep manual modifications that you made to the Unemployment Certificate data record. You need to enter the modifications again, after completing this procedure.

Period Tab

Include Clear if you don't want to include this row of information on the Unemployment Certificate. Include is the default value.

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Calendar ID The load process populates this field by searching the calendar on GP result tables that corresponds to the appraisal period on the same row.

Short Time Worker Select if the employee was a short-time worker.

Appraisal Prd Begin Date (appraisal period begin date) and **Appraisal Prd End Date** (appraisal period end date) The Appraisal Prd End Date on the first row is the termination date. The end date on other rows is the date one month earlier than the end date of the preceding row. The system populates the Begin Date fields so that the begin date and the end date on the same row make a one month period.

Base Num of AP Days (base number of approval period days) Enter the number of days from the appraisal period begin date to the appraisal period end date. This information is loaded automatically as an initial value regardless of the pay type for the employee. If the pay type for the employee is not Monthly Exempt, the base number of days must be entered manually.

Pay Period Begin Date and **Pay Period End Date** The begin date and the end date of the pay period that includes the Appraisal Period End Date on the same row.

Base Num of PP Days (base number of pay period days) The payment base date that is calculated by the SC FM BASE DAYS formula is loaded into this field automatically.

Particular note about wage Enter a note about the employee's wages, if necessary.

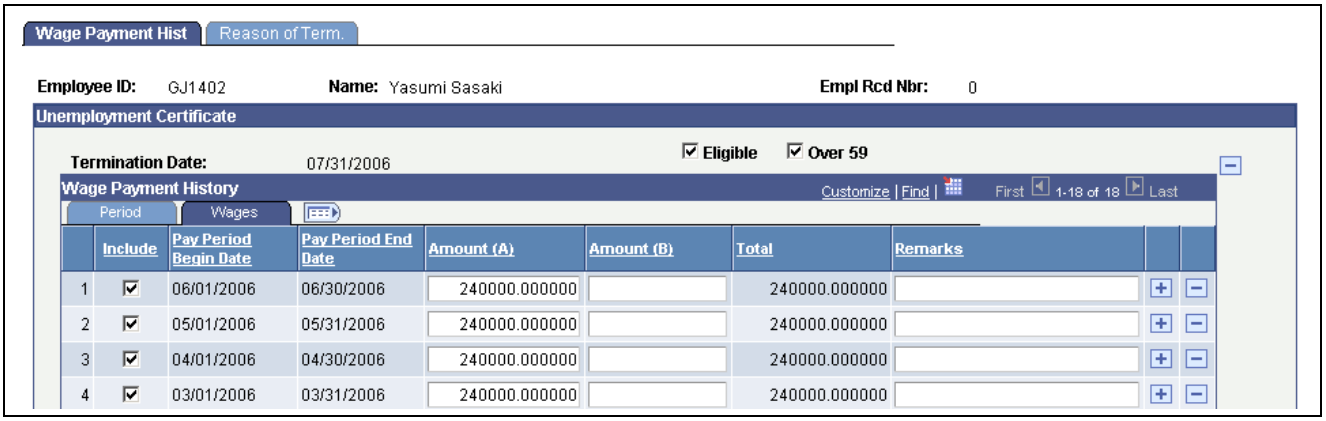
Last Updated By The value of this field is updated by the system. When the process loads the wage history data, this field is set to *System.* When you modify any information outside of the Wage Payment History grid, the system changes the Last Updated By field to *User.*

Update On If the Last Updated By field is set to *System,* this field displays the date on which the process was run. If the Last Updated By field is set to *User,* this field displays the date on which you modified the data.

Note. The changes to the Update On field apply only if you modify information outside of the Wage Payment History grid. If you modify information on the Wage Payment History grid, no changes will occur in the Update On field.

Wages Tab

In addition to the common fields defined previously, the Wages tab includes the following fields:



Wage Payment Hist page – Wages tab

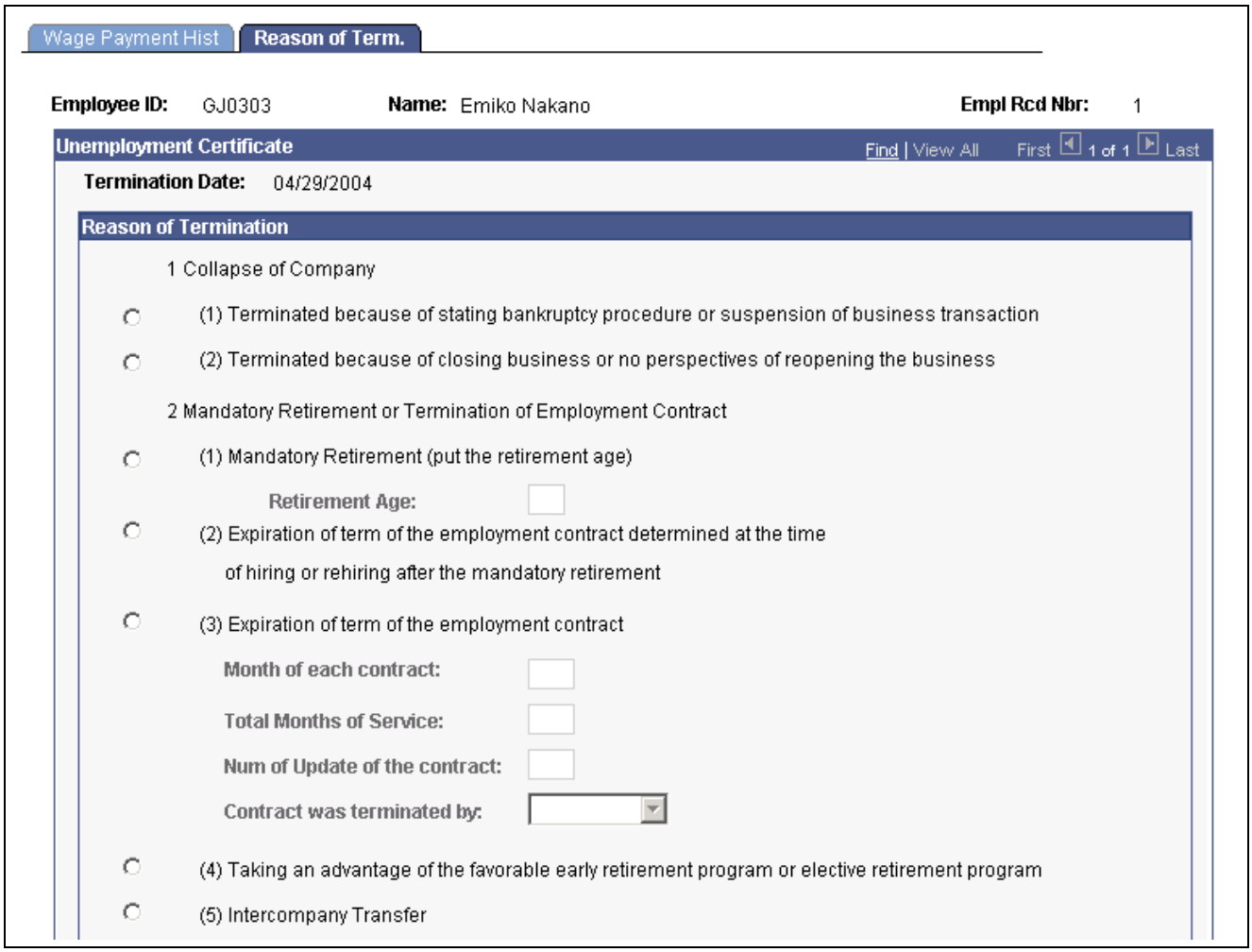
Amount (A) Enter the total amount of wages for a monthly salaried worker.

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Amount (B)	Enter the amount of base pay for daily and hourly salaried workers.
Total	The total of amount A and amount B is displayed.
Remarks	Enter special remarks (such as unpaid wages) for the period, if applicable.

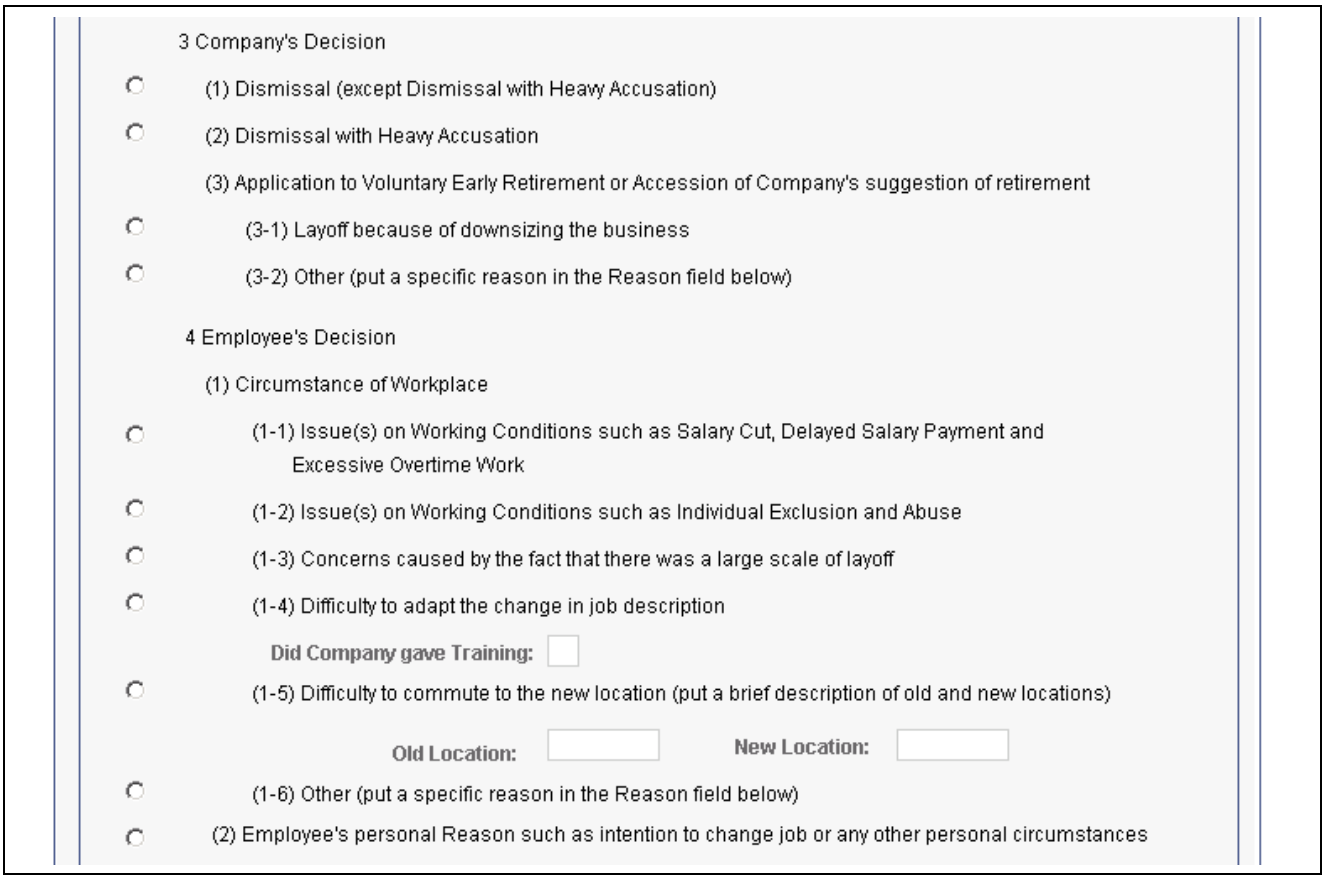
Entering Reason of Termination

Access the Reason of Term page.

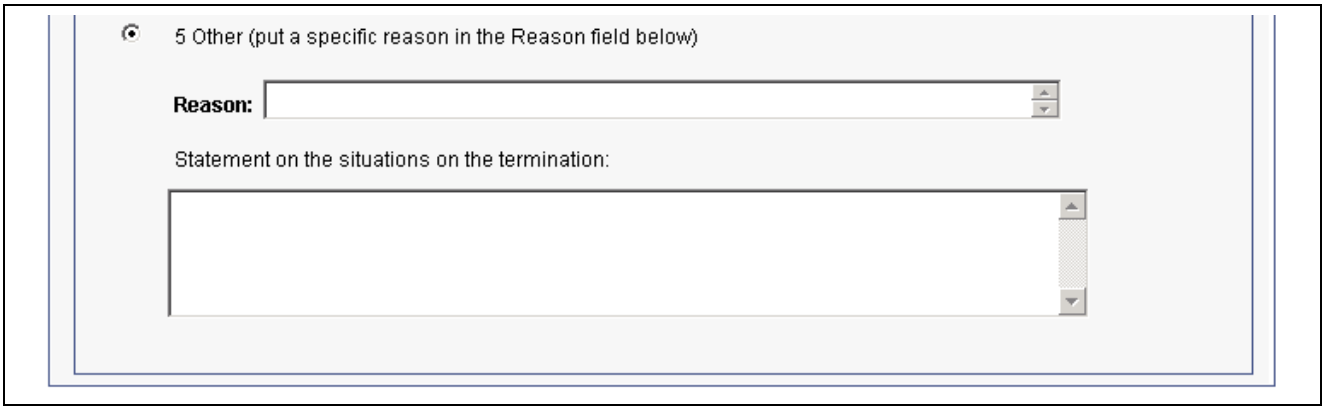


Reason of Term page (1 of 3)

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Reason of Term page (2 of 3)



Reason of Term page (3 of 3)

Note. You can access multiple Unemployment Certificate entries for an employee in the first scroll area of the Unemployment Certificate group box, above the Termination Date field.

Termination Date Displays the date that the employee was terminated.

Reason of Termination Select the reason for termination. Values are *Collapse of Company, Mandatory Retirement or Termination of Employment Contract, Company's Decision, Employee's Decision,* and *Other.* Depending on what you select, you may need to define the reason with more detail.

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Reason	If you select a termination reason or *3. (3–2), 4. (1)(1.6),* or *5,* you can enter a description of the specific reason.
Statement on the situations on the termination	Add a statement about the termination, if necessary.

Creating the Unemployment Certificate

This section provides an overview the Unemployment Certificate report and discusses how to generate Unemployment Certificates.

Understanding the Unemployment Certificate Report

After the load process retrieves the information, you can create the Unemployment Certificate report based on data that is in the intermediate report table. The report includes information about the terminated employee, such as Labor Insurance Establishment, employee payment history, and reason for termination.

Print the information on the blank Unemployment Certificate form supplied by the Job Security Office.

Note. A terminated employee must meet several conditions to be eligible for the unemployment benefit, such as the length of his or her employment. The Unemployment Certificate is not generated unless the employee meets these conditions, even if he or she has the Unemployment Certificate data.

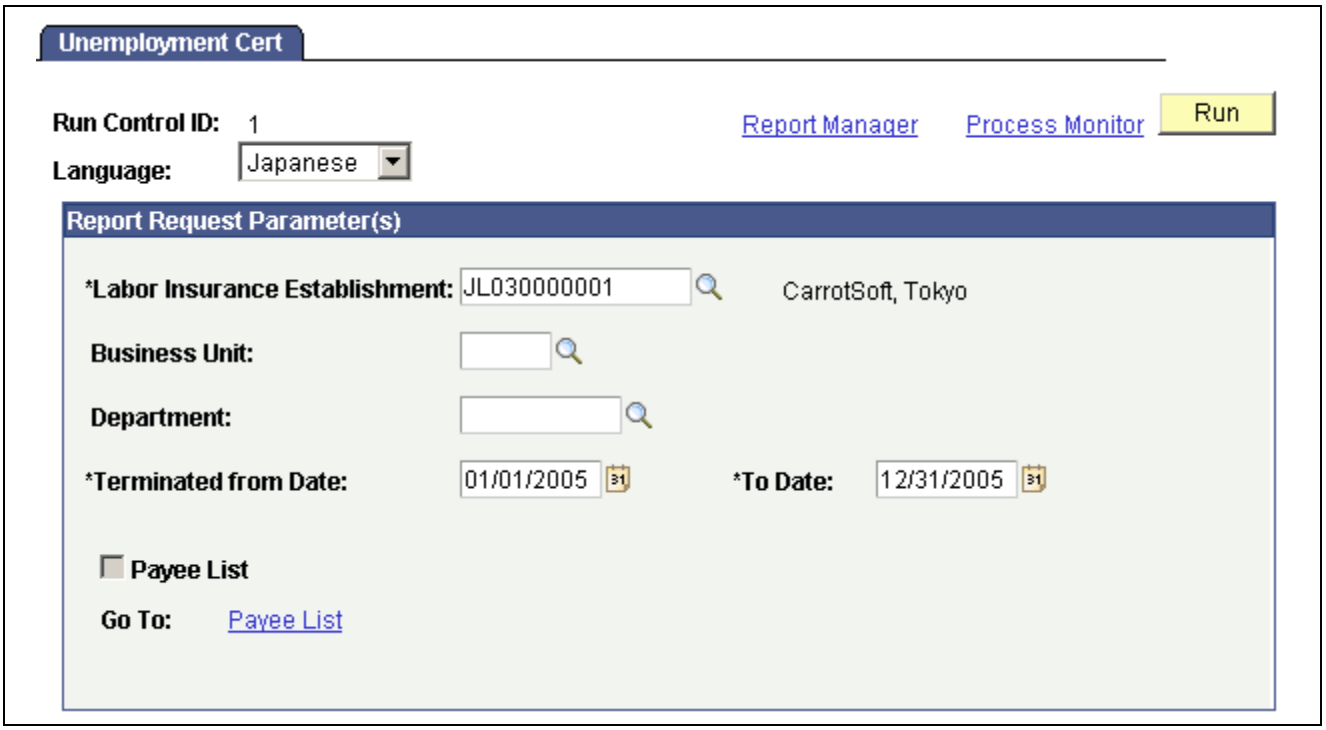
Page Used to Create Unemployment Certificates

Page Name	Object Name	Navigation	Usage
Unemployment Cert (unemployment certificate)	GPJP_RC_UC_RPT	Global Payroll & Absence Mgmt, Termination Processing, Print Unemployment Cert JPN, Unemployment Cert	Generate Unemployment Certificates.

Generating Unemployment Certificates

Access the Unemployment Cert page.

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Unemployment Cert page

Note. The fields and parameter settings on this page are the same as those that are used in the Load process that was discussed earlier in this chapter. You don't need to re-enter the same parameters if you want to use the same settings for both loading and printing. You can save the settings when you define them for the run control page for loading and use the same run control ID for printing.

See Also

Chapter 8, "Managing Unemployment Certificates and Wage Certificates at 60," Loading Unemployment Certificate Data, page 54

Managing Wage Certificates at 60

This section provides an overview of Wage Certificates at 60 and discusses how to:

- Load Wage Certificate at 60 data.
- Review and update Wage Certificate at 60 data.
- Print Wage Certificates at 60.

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Understanding Wage Certificate at 60

Similar to terminated employees who can receive an unemployment benefit in proportion to their wages during a specific period prior to the termination, older employees can receive an Employment Continuation Benefit in proportion to their wages during a specific period before becoming 60 years old. The Wage Certificate at 60 and the Unemployment Certificate are very similar in their requirements for eligibility. The format of these reports is basically the same with the exception of the effective date. The Unemployment Certificate is created using information as of the termination date. The Wage Certificate at 60 is created using information as of the date when the employee is assumed to reach age 60. This date is basically the date when the employee becomes 60 years old, but strictly speaking, this is the first date that meets both of the following conditions:

- The employee's age is between 60 and 64.
- At least five years have passed since the employee enrolled in the Employment Insurance plan.

Examples of Effective Date for Wage Certificate at 60

If the payee's birth date is May 10, 1945 and the Employment Insurance enrollment date is April 1, 1968, the Wage Certificate at 60 is effective May 9, 2005.

If the payee's birth date is May 10, 1945 and the Employment Insurance enrollment date is April 1, 2003, then this payee is regarded as reaching age 60 effective March 31, 2008 because on this date the payee meets both conditions discussed above.

With Global Payroll for Japan, you can:

- Load the report data based on birth date in the Personal Data component and effective date of enrollment row in the Labor Insurance Report Data component.
- Review and update the report data.
- Create a Wage Certificate at 60.

Pages Used to Manage Wage Certificates at 60

Page Name	Object Name	Navigation	Usage
Wage Cert at 60	GPJP_RC_UC_LOAD	Global Payroll & Absence Mgmt, Social Security / Insurance, Load Wage Cert at 60 JPN	Load data for the Wage Certificates at 60.
Update Wage Certificate at 60	GPJP_RC_UC_UPD	Global Payroll & Absence Mgmt, Social Security / Insurance, Update Wage Cert at 60 JPN	Review and update wage certificate information.
Wage Certificate	GPJP_RC_UC_RPT	Global Payroll & Absence Mgmt, Social Security / Insurance, Print Wage Cert at 60 JPN	Print Wage Certificates at 60.

Loading the Wage Certificate at 60 Data

Access the Wage Cert at 60 page.

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Wage Cert at 60 page

60 Years Old fromand**To Date** Employees whose became eligible for the Wage Certificate at 60 during this period are picked up by the load process.

Other fields on this page are the same as those on the Unemployment Cert page that is described in this chapter:

See Chapter 8, "Managing Unemployment Certificates and Wage Certificates at 60," Loading Unemployment Certificates, page 55.

Reviewing and Updating Wage Certificate at 60 Data

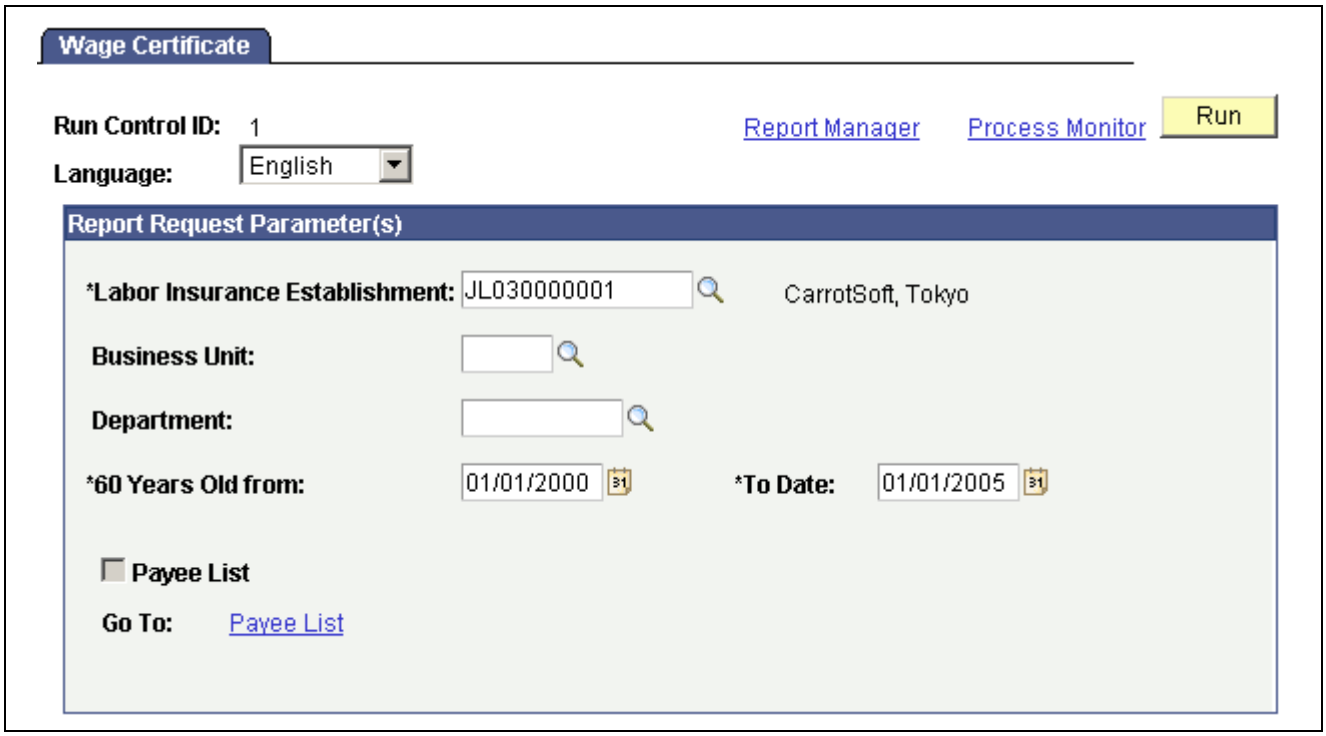
The Update Wage Cert at 60 page functions in the same way as the Wage Payment Hist page that is described in the Reviewing and Updating Unemployment Certificate Data section of this chapter, except that the Became eligible as of field is displayed instead of the Termination Date field.

See Chapter 8, "Managing Unemployment Certificates and Wage Certificates at 60," Entering Wage Payment History, page 57.

Printing the Wage Certificate at 60

Access the Wage Certificate page.

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Wage Certificate page

The fields and parameter settings on this page are the same as those that are used in the Load process that was discussed earlier in this chapter. You don't need to re-enter the same parameters if you want to use the same settings for both loading and printing. You can save the settings when you define them for the run control page for loading and use the same run control ID for printing.

See Chapter 8, "Managing Unemployment Certificates and Wage Certificates at 60," Loading the Wage Certificate at 60 Data, page 64.

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CHAPTER 9

Processing Retirement Allowances

This chapter provides an overview of retirement allowance processing and discusses how to:

- Enter retirement allowance data.
- Enter and process retirement allowances.
- Set up payslips for retirement allowances.
- Run the Retirement Allowance Withholding Tax report.

Understanding Retirement Allowance Processing

Upon retirement, payees may be eligible for a retirement allowance based on years of service, base pay, the reason for termination, or other criteria, according to your organization's policies. With Global Payroll for Japan, you can enter an employee's retirement allowance and have the system automatically calculate and deduct the related income tax and inhabitant tax (prefecture tax and municipality tax) on retirement earnings. The system can also generate a withholding tax report and payslips for retirement allowances.

This section discusses:

- Delivered elements for retirement allowances.
- Viewing delivered elements.
- Deduction processing rules.
- Retirement allowance setup and processing.

Delivered Elements for Retirement Allowances

Global Payroll for Japan delivers these elements for processing retirement allowances:

- Earning element (ER RET ALW).

  Use this element when entering the earning amount of an employee's retirement allowance through positive input.

- Accumulator (ER AC RET ALW EARN).

  This elements stores the earning amount of the retirement allowance. It has two members: earning element, ER RET ALW, which you populate through positive input, and the accumulator ER AC RET CUST ERN, which has no contributing members as delivered. You can have additional earnings contribute to ER AC RET ALW EARN by adding earning elements as members of that accumulator.

- Deduction elements (IN TAX RET, IH MUNIC RET), and (IH PREFT RET).

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The system uses these elements to calculate income tax, municipality tax, and prefecture tax for retirement allowances.

- Process list (JPRRET).

  This is the process list that is associated with the delivered run type element.

Viewing Delivered Elements

PeopleSoft delivers a query that you can run to view the names of all delivered elements designed for Japan. Instructions for running the query are provided in the *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook.*

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Viewing Delivered Elements," Understanding How to View Delivered Elements

Deduction Processing Rules

Global Payroll for Japan processes tax deductions for retirement allowance earnings by:

- Calculating the deduction amount of the retirement allowance, taking into account overlapping years of service and retirement due to disability.
- Calculating the retirement allowance income after the deduction by summing the earning amount of the retirement allowance (that you enter through positive input) and the former retirement allowance paid in the same year (as reported on the Maintain Retirement Allowance Data page) and subtracting the deduction amount of the retirement allowance.
- Calculating the taxable amount of the retirement allowance.
- Determining the income tax on the taxable amount of the retirement allowance, taking into account whether the employee submitted a retirement income report.

  Note. The system calculates income tax of zero when the retirement allowance was paid due to death.

- Determines the inhabitant tax based on the retirement allowance income after the deduction.

Retirement Allowance Setup and Processing

Retirement allowances are handled as unscheduled payments in an off-cycle run.

High-level steps for setting up and processing retirement allowances include:

1. Entering retirement allowance data, including the employee's years of service and data from the payee's Retirement Income report on the Maintain Retirement Allowance Data page.

   The system uses this information when it calculates the deduction amount of the retirement allowance and the taxes on the current retirement allowance. This step is required whether or not the payee has submitted a Retirement Income report.
2. Using the Off Cycle component to enter the payee's current retirement allowance earning as an unscheduled payment.
3. If applicable, entering the payee's date of death on the Biographical Details page in the Administer Workforce business process in PeopleSoft Enterprise Human Resources.
4. Running an off-cycle process for retirement allowances.

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5. Printing payslips.
6. Generating the Retirement Allowance Withholding Tax report.

Entering Retirement Allowance Data

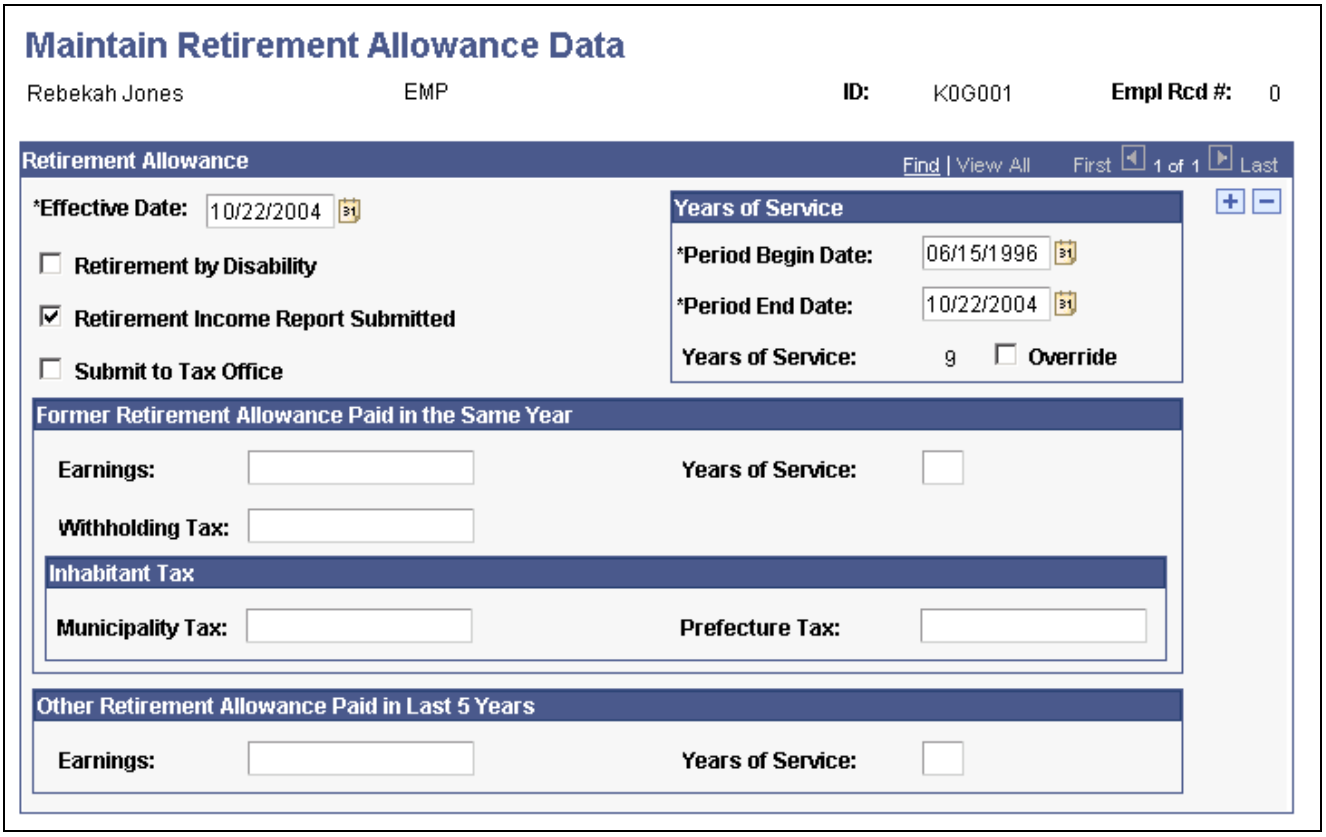
This section discusses how to enter years of service and data from an employee's Retirement Income report.

Page Used to Enter Retirement Allowance Data

Page Name	Object Name	Navigation	Usage
Maintain Retirement Allowance Data	GPJP_RA_PYE_DATA	Global Payroll & Absence Mgmt, Payee Data, Terminations, Maintain Ret Allow Data JPN	Enter data that is used to calculate a payee's withholding tax on a retirement allowance.

Entering Retirement Allowance Data

Access the Maintain Retirement Allowance Data page.



Maintain Retirement Allowance Data page

Effective Date Enter the payee's retirement date.

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Date of Death This field appears only if the payee's date of death is entered on the Biographical Details page in Administer Workforce. It is used with the Period End Date field.

Retirement by Disability Select if the retirement is due to disability.

Retirement Income Report Submitted Select if the payee submitted a Retirement Income report to your organization. If this check box is cleared, the system applies an income tax rate of 20 percent to the gross amount of the retirement allowance.

Submit to Tax Office This check box is used when printing the Legal Payment Summary report. If selected, the payee's earnings and withholding tax are included in the figures that are reported as submitted to the tax office.

Years of Service

Period Begin Date The system displays the payee's hire date or rehire date by default (as defined on the Job Information page). You can enter a different date.

Period End Date The system displays the payee's termination date by default (as defined on the Job Information page). You can enter a different date.

If a date of death is displayed on this page for the payee, and that date matches the period end date, the system considers the retirement allowance as paid due to the payee's death and calculates income tax and inhabitant tax as zero. It also excludes the retirement allowance from the Retirement Allowance Withholding Tax Report.

Years of Service The system calculates and displays the number of years of service based on the difference between the period begin date and period end date. You can manually enter a number in this field by using the Override check box.

Override To manually enter the years of service, select this check box to make the Years of Service field editable.

Former Retirement Allowance Paid in Same Year

Complete the fields in this group box using the data that the employee reported on the Retirement Income report. The system references the data in these fields when it calculates taxes on the retirement allowance.

Other Retirement Allowance Paid in Last 5 Years

Complete the fields in this group box using the data that the employee reported on the Retirement Income report. The system references the data in these fields when it calculates taxes on the retirement allowance.

If an employee works in two different organizations simultaneously, retirement allowance deductions should be made for only one instance in the overlapping period.

Entering and Processing Retirement Allowances

This section discusses how to enter and process retirement allowances. When the system processes a retirement allowance, it automatically calculates the related income tax and inhabitant tax, based on information entered on the Maintain Retirement Allowance Data page.

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To enter processing instructions:

1. Create a calendar for an off-cycle run, using the following settings:
   - Payee Selection = *All Payees with....*
   - Additional Criteria = *Positive Input*.
2. Create an off-cycle request that specifies which employees are to receive a retirement allowance and the amount of each allowance:
   a. Access the Off Cycle Requests component (GP_OFFCYCLE_SETUP) for the appropriate pay group and target period.
   b. On the Main page, enter a description and payment date.
   c. On the Unscheduled Payments page: Period tab, enter a row for each employee who is to receive a retirement allowance.
   d. On the Unscheduled Payments page: Associated Data (Links) tab, click the P.I. for Target Calendar link to access an employee's Positive Input page.
   e. On the Positive Input page: Action tab, select the delivered earning element for retirement allowance, *ER RET ALW,* and select an action type of *Override*.

      Note. If you modified the accumulator ER AC RET CUST ERN to include earnings in addition to ER RET ALW, enter the amounts for those earnings elements as well, if applicable.

   f. On the Positive Input page: Main Components tab, enter the amount of the retirement allowance for ER RET ALW.
   g. Repeat step d through f for each employee that is to receive a retirement allowance.
3. Create an off-cycle calendar group using the Calendar Group component (GP_CALENDAR_RUN).

   When creating the off-cycle calendar group, select the Off cycle check box and specify the pay group, period ID, and off-cycle group to process.
4. Run the process.

   Use the Payroll/Absence Run Control page to run the off-cycle process.

See Also

Chapter 19, "Managing Off-Cycle Payments," page 181

Setting Up Payslips for Retirement Allowances

You can create a payslip template for retirement allowances. For each pay group, assign the template to the retirement allowance run type.

See Also

Chapter 18, "Generating Payslips," page 177

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Running the Retirement Allowance Withholding Tax Report

This section provides an overview of the Retirement Allowance Withholding Tax Report and discusses how to run the report.

Understanding the Retirement Allowance Withholding Tax Report (GPJP_RA_WH)

The Retirement Allowance Withholding Tax report is a comma separated value (csv) file that reports the tax amounts withheld from payees' retirement allowances. For each payee, the report lists the payee's name, address, earnings amount of the retirement allowance, income tax, municipality tax, and prefecture tax. It also lists the employee's years of service, hire date, retirement date, and municipality code. It does not include retirement allowance paid due to a payee's death.

You can edit and print the file with Microsoft Excel.

Prerequisite

Before you can generate the Retirement Allowance Withholding Tax report, you must create a file handle that specifies the exact path (including file name) for the file.

See Also

Chapter 18, "Generating Payslips," page 177

Page Used to Run the Retirement Allowance Withholding Tax Report

Page Name	Object Name	Navigation	Usage
Create Retirement Allowance Withholding Tax Report	GPJP_RC_RA_WH	Global Payroll & Absence Mgmt, Termination Processing, Create Ret Allow for WT RPT JPN, Create Retirement Allowance Withholding Tax Report	Creates a file that reports the tax amounts withheld from retirement allowances.

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CHAPTER 10

Managing Commuting Allowance

This chapter provides an overview of commuting allowance and discusses how to:

- Enter commuting allowance data.
- Adjust for a change in commuting allowance during the payment term.

Understanding Commuting Allowance

The delivered rules for processing commuting allowance satisfy Japanese statutory and basic business process requirements. This section reviews some of the requirements and discusses in general terms how the rules satisfy them. A later section describes the individual elements of the rules.

This section discusses:

- Frequency of commuting allowance.
- Cash and non-cash commuting allowance.
- Commuting allowance input methods.
- Taxable and nontaxable commuting allowance.
- Commuting allowance for multiple jobs.
- Delivered commuting allowance earnings.

Frequency of Commuting Allowance

Global Payroll for Japan supports payment of commuting allowance in pay cycle frequencies of one day, one month, three months, and six months.

- If the frequency is one day, the system calculates the monthly commuting allowance payment as the daily amount multiplied by the number of days worked.
- If the frequency is one month, the system uses the amount as the monthly commuting allowance.
- If the frequency is three months or six months, the actual payment is made only once for the three- or six-month period, but the system prorates and tracks the monthly value of cash and non-cash commuting allowance for monthly remuneration calculations.

Payment frequency depends on the data input method. For the total amount method, all components of an employee's commuting allowance must be paid on the same frequency. For the route method, each commuting route can be paid according to its own frequency.

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Cash and Non-cash Commuting Allowance

PeopleSoft provides a page on which you enter the values for the following components of an employee's commuting allowance:

- Cash fare.
- Cash toll.
- Non-cash fare.
- Non-cash toll.

The array CM AR COMM ALLOW assigns these values to the appropriate variables.

The system uses the non-cash values that you enter only for purposes of income tax and monthly remuneration calculations. The non-cash amounts are not added to pay as an earning.

Commuting Allowance Input Methods

Global Payroll for Japan enables you to record commuting allowances by total amount or by commuting route. The system enables you to enter an employee's commuting allowance either as one total commuting amount based on pay cycle (the total amount method), or as separate commuting amounts based on route (the commuting route method).

The input method affects payment cycle and tax calculations. Employees opting for the amount method select one pay cycle in which all allowances are paid.

Employees opting for the commuting route method select one pay cycle for each route.

Taxable and Nontaxable Commuting Allowance

You must track the amount of taxable and nontaxable commuting allowance for income tax calculations. The statutory nontaxable amount (limit of the tax exemption) for the total commuting allowance (fare and toll) is the same for all employees. The amount is contained in variable CM VR NTAX ALW MX.

If the pay frequency is three or six months, the system calculates the maximum nontaxable amounts for the full term and applies those limits to the commuting allowance amounts for the full term.

Total Amount Input Method

The maximum nontaxable toll compensation varies by employee. You enter the value on the Commuting Allowance Details page.

Global Payroll for Japan separately tracks amounts for fare and toll. The system first calculates the nontaxable toll amount by applying the individual limit. It then uses that figure to derive the total amounts of taxable and nontaxable commuting allowance compensation.

Route Input Method

When the commuting allowance input method of route is used, the system assumes that all allowances are nontaxable. It is your responsibility to determine whether the monthly totals are nontaxable. If an employee's commuting allowance nears the monthly nontaxable limit, or contains taxable commuting allowances such as first class passes, you should use the amount input method.

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Commuting Allowance for Multiple Jobs

Global Payroll for Japan supports multiple jobs functionality. For employees with multiple jobs, the commuting allowance is calculated for each job, not for each employee. Likewise, the monthly nontaxable limit is applied for each job, not for each employee, as is described in the following examples.

Standard Example

A commuting allowance of 140,000 JPY is paid for employee Yuko Yoneda, who has one employment record number. The system will apply the monthly nontaxable limit to the employment record number and deduce that 100,000 JPY is nontaxable and 40,000 JPY is taxable.

Multiple Jobs Example

Kimi Kubota has two employment records, 1 and 2. A commuting allowance of 60,000 JPY is paid for employment record number 1. A commuting allowance of 80,000 JPY is paid for employment record number 2. The system will apply the monthly nontaxable limit to each employment record number and deduce that allowances are nontaxable. Notice that Kimi Kubota receives the same commuting allowance as Yuko Toneda in the preceding example. Kimi Kubota's allowances are nontaxable because each individual payment never exceeds the nontaxable limit.

Delivered Commuting Allowance Earnings

Global Payroll for Japan delivers the following earnings to calculate and track commuting allowances.

Earning Item	Description
CM TAX ALW	Taxable commuting allowance.
CM NTAX ALW	Nontaxable commuting allowance.
CM TAX ADJ	Taxable commuting allowance adjustment.
CM NTAX ADJ	Nontaxable commuting allowance adjustment.

The PeopleSoft system delivers a query that you can run to view the names of all delivered elements designed for Japan. Instructions for running the query are provided in the *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Viewing Delivered Elements"

Entering Commuting Allowance Data

This section provides an overview of how to set up commuting allowance data and discusses how to:

- Enter commuting allowance by total amount.

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- Enter commuting allowance by routes.

Setting Up Commuting Allowance Data

Before you can process commuting allowance in the payroll run, you must enter some data that establishes limits on the monthly nontaxable commuting allowance and define the commuting allowance amounts for individual employees.

1. Update the current statutory allowance on the Variables by Category page (only if the statutory limit has changed).
   - PeopleSoft delivers the default value of 100,000 JPY for the variable CM VR NTAX ALW MX.
   - Select the category *CMTX* when you access the Variables by Category page.
   - Enter the new value for the variable CM VR NTAX ALW MX on the Values tab of the Variables by Category page.
2. Enter the commuting allowance data for each employee on the Commuting Allowance page.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Defining Calculation Elements"

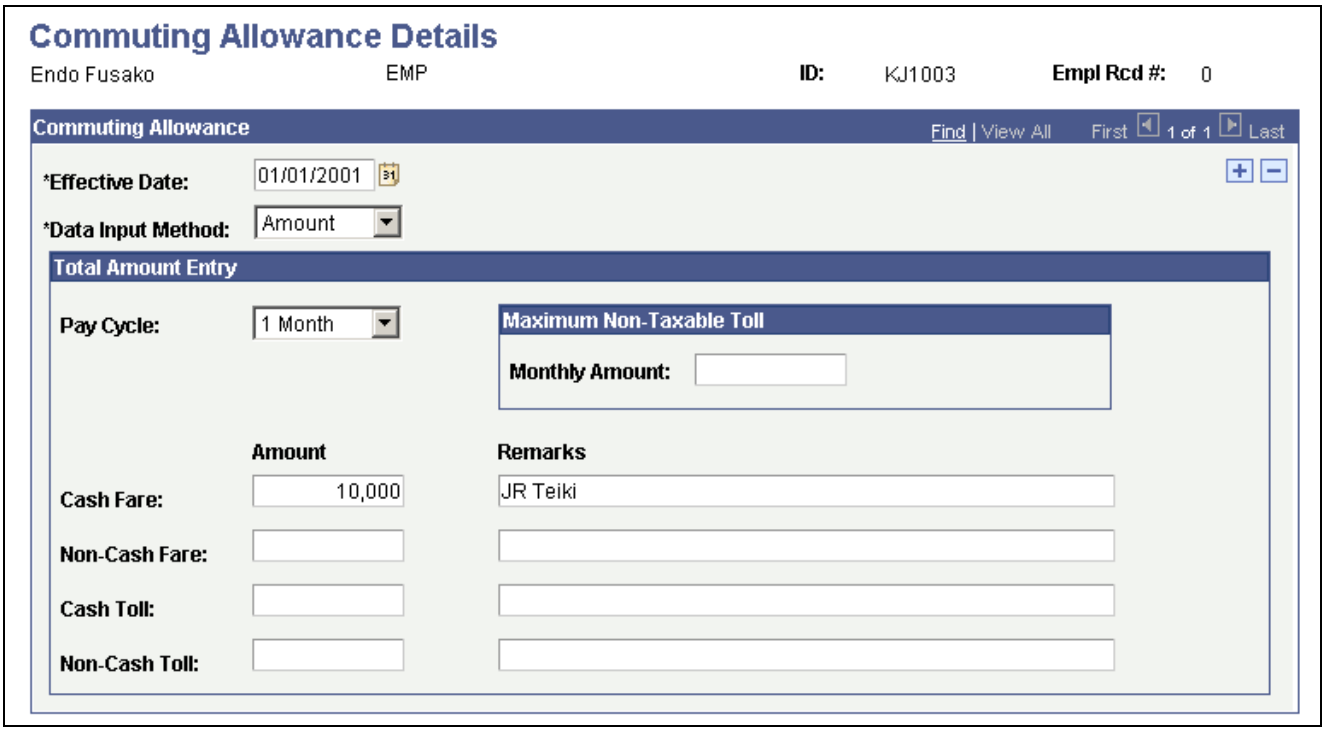
Page Used to Enter Commuting Allowance Data

Page Name	Object Name	Navigation	Usage
Commuting Allowance Details	GPJP_CM_PYE_DATA	Global Payroll & Absence Mgmt, Payee Data, Assign Earnings and Deductions, Commuting Allowance JPN, Commuting Allowance Details	Enter commuting allowance amounts. Define the data by total amount or by commuting routes for each employee.

Entering Commuting Allowance by Total Amount

Access the Commuting Allowance Details page.

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Commuting Allowance Details page

Empl Rcd # (employment record number) Displays the employment record number to which this allowance is applied. The nontaxable limit is applied to each employment record number rather than each employee.

Data Input Method Select *Amount* to access the Total Amount Entry group box.

Pay Cycle Select the frequency of the term of the commuting allowance for this employee: *1 Day, 1 Month, 3 Months,* or *6 Months.* All components of the commuting allowance must have the same pay cycle frequency.

Amount Enter the amount of commuting allowance in each of the fields: Cash Fare, Non-Cash Fare, Cash Toll, and Non-Cash Toll.

Fare refers only to the most reasonable commuting expense for the employee's commute, which is generally the cost of public transportation. Toll applies to all commuting allowances other than fare, including commuting ticket fare, mileage, toll, and first class fare.

Remarks Enter a description of the commuting allowance item, such as the name of the transport facility, route, and so on. This is for your information only.

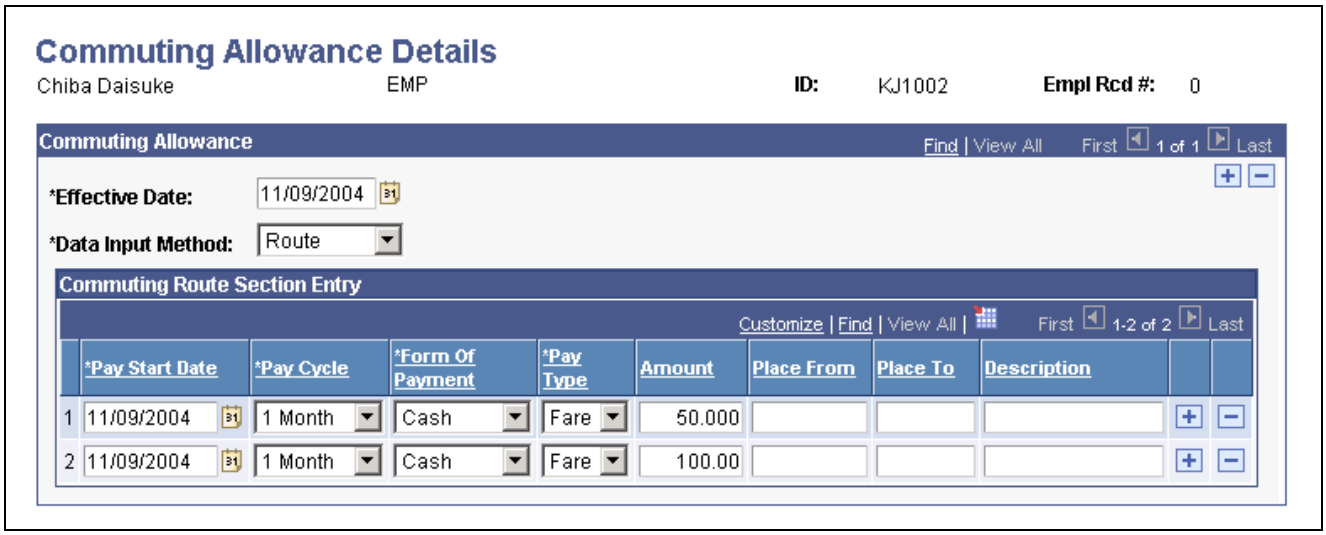
Maximum Non-Taxable Toll

Monthly Amount Determine this value on an individual basis for each employee.

Entering Commuting Allowance by Routes

Access the Commuting Allowance Details page.

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Commuting Allowance Details page

Empl Rcd # (employment record number) Displays the employment record number to which this allowance is applied. The nontaxable limit is applied to each employment record number rather than each employee.

Data Input Method Select *Route* to access the Commuting Route Section Entry group box.

Pay Start Date Enter the first date on which this allowance is paid. The system will then calculate the commuting allowance based on the pay cycle. For instance, a six-month pay cycle beginning on January 1 would be paid in January and July.

Pay Cycle Select the frequency of the term of the commuting allowance for this commuting route: *1 Day, 1 Month, 3 Months,* or *6 Months.* Each route section may have a different pay cycle frequency.

Form of Payment Select either *cash* or *non cash.*

Pay Type Select either *Fare* or *Toll.* Fare refers only to the most reasonable commuting expense for the employee's commute, which is generally the cost of public transportation. Toll applies to all commuting allowances other than fare, including commuting ticket fare, mileage, toll, and first class fare.

Amount Enter the commuting allowance paid per cycle.

Place From and **Place To** Enter the route's start and end point.

Description Enter a description of the route.

Adjusting for a Change in Commuting Allowance During the Payment Term

An employee might change the commuting route after receiving a three- or six-month payment of the commuting allowance. If this happens, the unused portion of the commuting allowance that was paid in advance would require adjustment for the remaining months in the term.

To adjust for commuting allowance that has already been paid:

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1. Calculate the amount of the adjustment and enter it into Global Payroll calculations as positive input.

   The total amount of the adjustment is the amount that the employee must reimburse the company for unused commuting allowance that was paid in advance at the rate of the previous commuting route.

   PeopleSoft delivers two earnings items for entering the taxable and nontaxable portions of the commuting allowance adjustment as positive input.

2. Enter the employee's new commuting allowance values for the new route on the Commuting Allowance page and process normally for the reimbursed months and continuing onward.

Example of Commuting Allowance Adjustment

In January, you pay an employee 360,000 JPY for a three-month commuting pass. At the end of February, the employee moves and must reimburse the company a value of 120,000 JPY for one month of the pass (March).

To process reimbursement of the advance payment for the month of March in this example:

1. Enter positive input of the following amounts:

Earning Element	Description	Value in the Example
CM TAX ADJ	Taxable commuting allowance adjustment.	–20,000 JPY
CM NTAX ADJ	Nontaxable commuting allowance adjustment.	–100,000 JPY

   The accumulator CM AC ADJUST calculates the total adjustment of –120,000 JPY.

2. Enter the employee's new commuting allowance values for the month of March on the Commuting Allowance page and process normally.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Working with Positive Input"

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CHAPTER 11

Managing Social Insurance

This chapter provides an overview of social insurance rules, lists prerequisites, and discusses how to:

- View delivered earnings and deductions for social insurance.
- Prepare employee social insurance payee data.
- Prepare for Monthly Standard Remuneration Reports.
- Check social insurance calculations.
- Run social insurance reports.
- Create social insurance report data files.
- Prepare for social insurance premium payment.

Understanding Social Insurance Rules

This section discusses:

- Standard remuneration calculations.
- Premium calculations.

Standard Remuneration Calculations

This section discusses the rules and elements used to calculate:

- Monthly remuneration.
- Monthly standard remuneration and grades.
- Eligibility for regular decision or occasional revision.
- Retroactive increase or decrease in fixed wages.

Monthly Remuneration

The system is delivered with rules and elements that support monthly remuneration calculations. Some of the highlights are:

- Accumulators track cash and non-cash earnings that are subject to the social insurance premium and monthly fluctuation in the fixed wage portion of salary.
- Variables, formulas, and accumulators track and evaluate the base days for payment in each month for each pay type.

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- Formulas calculate average monthly remuneration for appraisal months during which the employee worked sufficient base days.

Monthly Standard Remuneration and Grades

PeopleSoft delivers and maintains the Monthly Standard Remuneration table. View the values and grades in this table on the SI Standard Remun (social insurance standard remuneration) page.

Eligibility for Regular Decision or Occasional Revision

The system uses four subject indicators to track eligibility for occasional revision or regular decision during a salary pay run:

Occasional Revision	The employee meets all conditions for occasional revision.
Occasional Revision Candidate	The employee's total amount of fixed wages has decreased or increased two months ago. The system calculates the employee's monthly standard remuneration for the previous three-month period and determines eligibility for occasional revision.
Regular Decision	The employee is eligible for regular decision.
Not Applicable	The field will nullify a system-entered value.

The system uses these subject indicators to determine which calculations to perform and which employees to select for reports.

Retroactive Increase or Decrease in Fixed Wages

When an employee has a retroactive increase or decrease in fixed wages, the system calculates the adjusted average monthly remuneration during the appraisal period if enough base days are in the month of retroactive payment. Eligibility for occasional revision is determined based on the adjusted average monthly remuneration.

Premium Calculations

This section provides important information that you should keep in mind about how the system determines:

- Premium calculations from salary.
- Premium calculations from bonus.
- Premium deductions for enrollments and terminations.
- Employer contributions.

Premium Calculations from Salary

The social insurance premiums for monthly salaries are calculated based on the monthly standard remuneration as of the end of the month, then deducted from the salaries that are paid in the following month.

The social insurance premiums that are deducted from salaries are calculated based on the values of the following data as of the end date of the month previous to the month in which payment is made:

- Employee's monthly standard remuneration.
- Standard Remuneration Grade table.
- Premium rates that are set up for the establishment on the SI Premium Rates page.
- The employee's social insurance data that is entered on the Social Insurance Data page.

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This means that for premiums deducted in May, the system uses values with an effective date as of April 30 of the same year. Make sure that the data that is effective at the end of a month is the data that you want to use for calculating premiums that are deducted in the following month.

Note. The social insurance premiums are calculated based only on the monthly standard remuneration as of the end of the month; the actual salary payment in that month does not affect the premiums at all.

Premium Calculations from Bonus

The social insurance premiums that are deducted from bonuses are calculated based on the values of premium rates that are set up for the establishment on the SI Premium Rates page with the effective date as of the end of the month when the bonus is paid. The standard bonus remuneration that is used for the calculation is the actual gross bonus amount truncated to the nearest thousand yen. The standard bonus remuneration is subject to caps for health insurance and employees pension insurance.

Premium Deductions for Enrollments and Terminations

The system checks the employee's social insurance data to determine whether an enrollment or termination change reason exists in the month of payment or the previous month. If an enrollment or termination change reason exists, the system calculates the appropriate deduction from salaries.

Note that the social insurance termination data must be entered before the payee's last payments are processed.

For example, an employee's last day is May 10 and the pay period of her last payment is from April 16 through May 15. The payroll is processed on May 20. In this example, before her last payment is processed on May 20, you must enter her social insurance termination data with an effective date of May 11.

Employer Contributions

The system includes the payer social insurance flag variable (SC VR CALC ER FLG), which indicates if the employer contributions are calculated. If this flag is selected, the system calculates the following premiums for employers and employees:

- Health insurance.

  The system calculates the employer contribution of health insurance as variable SC VR HEL CO and saves the data in the writable array GPJP WA SCRPT.

- Nursing care insurance.

  The system calculates the employer contribution of nursing case insurance as variable SC VR NUR CO and saves the data in the writable array GPJP WA SCRPT.

- Pension insurance.

  The system calculates the employer contribution of pension insurance as variable SC VR PEN CO and saves the data in the writable array GPJP WA SCRPT.

- Pension fund.

  The system calculates the employer contribution of pension fund as variable SC VR FND CO and saves the data in the writable array GPJP WA SCRPT.

You can set contribution rates for health, nursing care, pension, and pension fund insurance premiums on the SI Premium Rates page.

See Chapter 4, "Setting Up Insurance, Taxes, and Payslips," Setting Up Social Insurance Premium Rates, page 28.

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In addition, the system calculates the contribution for child benefit. This contribution is based on the total pension remuneration and is calculated as part of the Social Insurance Check report.

See Also

Chapter 4, "Setting Up Insurance, Taxes, and Payslips," Setting Up for Social Insurance Processing, page 27

Chapter 11, "Managing Social Insurance," Entering and Updating Employee Social Insurance Data, page 88

Chapter 7, "Processing Terminations," page 47

Viewing Delivered Earnings and Deductions for Social Insurance

Global Payroll for Japan delivers the following deductions to calculate and track social insurance premiums:

Deduction	Description
SC FND BON	Employees' Pension Fund bonus installment.
SC FND SAL	Employees' Pension Fund salary installment.
SC HEL BON	Health Insurance bonus premium.
SC HEL SAL	Health Insurance salary premium.
SC NUR BON	Nursing Care Insurance bonus premium.
SC NUR SAL	Nursing Care Insurance salary premium.
SC PEN BON	Employee's Pension Insurance bonus premium.
SC PEN SAL	Employees' Pension Insurance salary premium.

Global Payroll for Japan delivers to the following earnings to track monthly remuneration:

Earning	Description
SC REM S01	Monthly remuneration in January.
SC REM S02	Monthly remuneration in February.

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Earning	Description
SC REM S03	Monthly remuneration in March.
SC REM S04	Monthly remuneration in April.
SC REM S05	Monthly remuneration in May.
SC REM S06	Monthly remuneration in June.
SC REM S07	Monthly remuneration in July.
SC REM S08	Monthly remuneration in August.
SC REM S09	Monthly remuneration in September.
SC REM S10	Monthly remuneration in October.
SC REM S11	Monthly remuneration in November.
SC REM S12	Monthly remuneration in December.

The PeopleSoft system delivers a query that you can run to view the names of all delivered elements designed for Japan. Instructions for running the query are provided in the *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Viewing Delivered Elements"

Prerequisites

You must do the following tasks before you can calculate social insurance premiums:

- Set up social insurance establishments.
- Set up social insurance premium rates.

See Also

Chapter 4, "Setting Up Insurance, Taxes, and Payslips," Setting Up for Social Insurance Processing, page 27

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Preparing Employee Social Insurance Payee Data

This section provides an overview of preparing employee social insurance data and discusses how to:

- Enter and update employee social insurance data.
- Manage social insurance dependent data.

Overview of Preparing Employee Social Insurance Data

Enter or update an employee's monthly remuneration amount and other social insurance personal information on the Social Insurance Data page. Manually enter this information when you initially set up the system and when you enroll a new employee. The system automatically updates the monthly remuneration amount when you run the Update SI Monthly Remun process (GPJP_UPD_REM). You can then edit the data.

Understanding Effective Dates

The following list explains the effective date for occasional revision and regular decision that is entered by the Monthly Remuneration Update process:

- Occasional revision.

  The effective date of the revised monthly standard remuneration and grade is the first day of the month after the payroll month for which the eligibility for occasional revision is established.

  For example, if the payee becomes eligible for occasional revision when you run the occasional revision processing after finalizing May payroll, the effective date of the revised monthly standard remuneration grade is June 1. The social insurance premiums for June, which are calculated with the new grade, are deducted from the payee's salary in the July payroll.

- Regular decision.

  The effective date of the revised monthly standard remuneration and grade is September 1. The social insurance premiums for September, which are calculated with the new grade, are deducted from the payee's salary in the October payroll.

Calculating Standard Remuneration and Premiums for Multiple Jobs

When an employee receives salaries from multiple jobs, monthly remuneration is, by law, the sum of the salaries paid from all jobs. Monthly standard remuneration is calculated by the Occasional Revision or Regular Decision processes based on the monthly remunerations for the appraisal months. Social insurance from salary is calculated based on the monthly standard remuneration and deducted from the salary that is paid from the employment record number that the user assigned on the Social Insurance Data page.

When an employee receives bonuses from multiple jobs, the standard bonus is the sum of the bonuses paid from all jobs. Social insurance from the bonus is calculated based on the standard bonus, and deducted from the bonus that is paid from the employment record number that the user assigned on the Social Insurance Data page.

The following table shows an example of an employee who has two employment records:

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Employment Record Number	Salary	Monthly Remuneration	Monthly Standard Remuneration	Health Insurance Premium
0	300,000 JPY	400,000 JPY (300,000 + 100,000)	410,000 JPY	32,000 JPY (410,000 JPY * 8%)
1	100,000 JPY	0	0	0

The following steps describe how to calculate social insurance when salaries are paid from more than one job:

1. Create five user-defined earnings elements (these are not delivered by PeopleSoft):
   - Separately Paid Cash Remuneration (Salary)—This should be accumulated to the Total Amount of Cash Remuneration (Salary) (ER AC CASH REM SAL) accumulator.
   - Separately Paid Non-Cash Remuneration (Salary)—This should be accumulated to the Total Amount of Non-Cash Remuneration (Salary) (ER AC NCSH REM SAL) accumulator.
   - Separately Paid Fixed Wage—This should be accumulated to the Total Amount of Fixed Wage (ER AC FIX WAGE SAL) accumulator.
   - Separately Paid Cash Remuneration (Bonus)—This should be accumulated to the Total Amount of Cash Remuneration (Bonus) (ER AC CASH REM BON) accumulator.
   - Separately Paid Non-Cash Remuneration (Bonus)—This should be accumulated to the Total Amount of Non-Cash Remuneration (Bonus) (ER AC NCASH REM BO) accumulator.
2. Add the earnings that you set up in step 1 into the Process List and the Element Group.
3. Use positive input to enter remunerations paid from Employment Record Number 1 into the corresponding earnings in Employment Record Number 0.

   The combined Social Insurance Premium for Employment Record Numbers 0 and 1 is calculated by the payroll process for Employment Record Number 0.

Pages Used to Prepare Employee Social Insurance Data

Page Name	Object Name	Navigation	Usage
Social Insurance Data	GPJP_SC_PYE_DATA	Global Payroll & Absence Mgmt, Payee Data, Social Security/Insurance, Maintain Social Ins Data JPN, Social Insurance Data	Enter and update employee social insurance data. Enter a new enrollee's monthly remuneration amount and other social insurance personal information. Run the Update SI Monthly Remun process to automatically update this page. You can enter updates manually, as in the case of Regular Decision by Insurance Provider.
Social Insurance Dependent Data	GPJP_SC_DEP_DATA	Global Payroll & Absence Mgmt, Payee Data, Social Security/Insurance, Maintain Dep Soc Ins Data JPN, Social Insurance Dependent Data	Maintain a payee dependent's social insurance data.

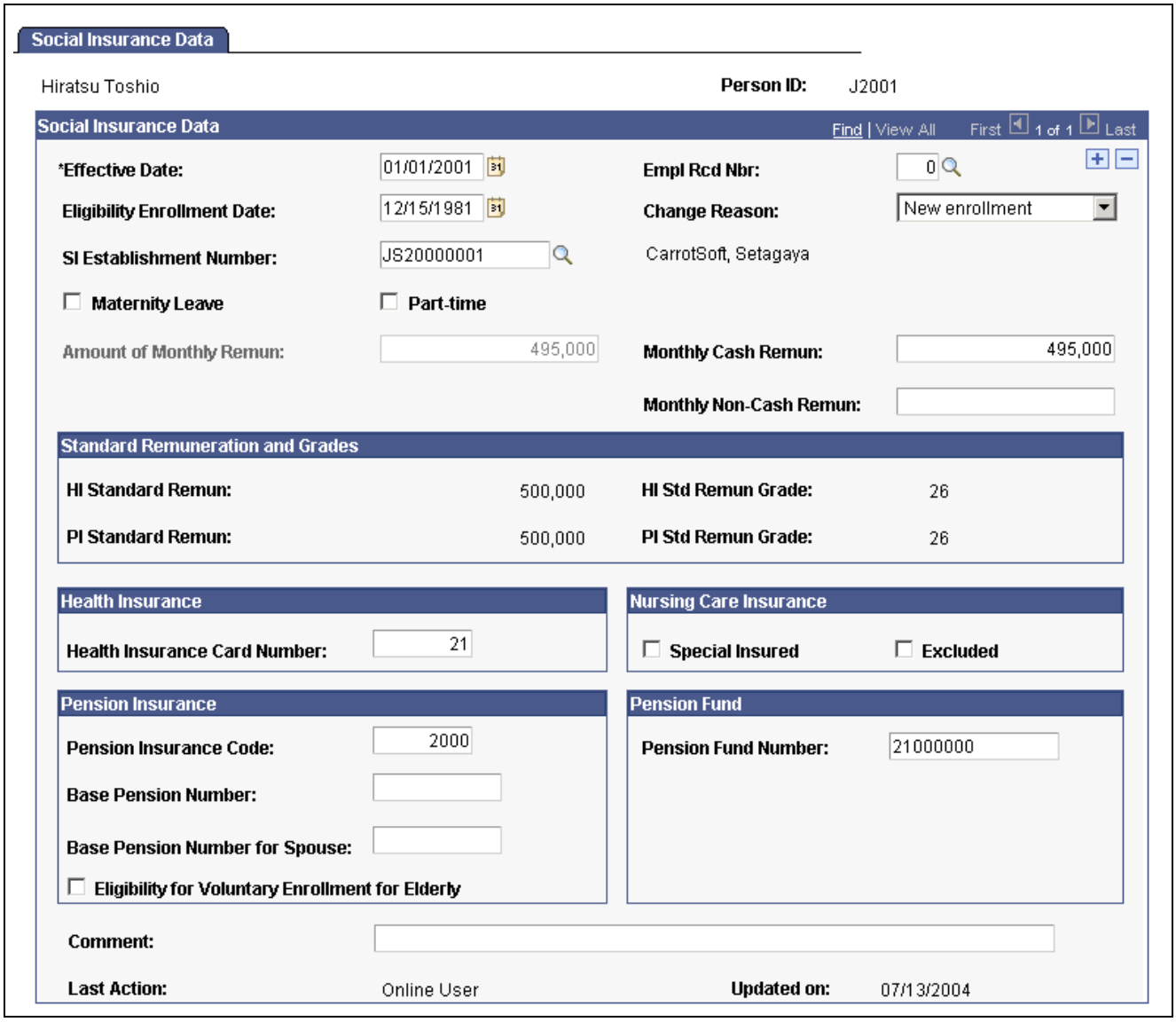
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See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Defining Calculation Elements"

Entering and Updating Employee Social Insurance Data

Access the Social Insurance Data page.



Social Insurance Data page

Effective Date Enter the date on which this page's information takes effect.

By using an effective date prior to the date upon which the payroll system was global payroll, the system enables you to enter informational data that will not be included in any global payroll calculation. In this case, the system doesn't validate the consistency between the employment record number on the Social Insurance Data page and the pay system flag on the Job table.

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Empl Rcd Nbr (employment record number) Enter the employment record number to which the system will apply the social insurance deduction. You can link the social insurance data only to the employment record number whose current pay system flag on the Job table is Global Payroll.

Eligibility Enrollment Date Enter the date on which the employee is eligible for enrollment in the social insurance establishment. The system does not use this field. Instead, the system considers the effective date of the change reason of new enrollment or re-enrollment as the eligibility enrollment date.

Change Reason Enter the value used to track the Enrollment/Termination status of social insurance. Values are:

New enrollment. The system uses the effective date as the enrollment date for eligibility into the social insurance establishment for social insurance deductions.

The SI Create Other Report File process picks up the rows with this Change Reason when it creates the Enrollment Report.

Re-enrollment. The system uses the effective date as the enrollment date for eligibility into the social insurance establishment for social insurance deductions.

The SI Create Other Report File process picks up the rows with this Change Reason when it creates the Enrollment Report.

Loss by Death. The system uses the effective date as the termination date for eligibility into the social insurance establishment.

The SI Create Other Report File process picks up the rows with this Change Reason when it creates the Termination Report.

Loss by Age. The system uses the effective date as the termination date for eligibility into the social insurance establishment.

The SI Create Other Report File process picks up the rows with this Change Reason when it creates the Termination Report.

Loss by Other Reason. The system uses the effective date as the termination date for eligibility into the social insurance establishment.

The SI Create Other Report File process picks up the rows with this Change Reason when it creates the Termination Report.

Occasional Revision: This value is set by the Update Social Insurance Monthly Remuneration process when the payee is subject to occasional revision.

Regular Decision: This value is set by the Update Social Insurance Monthly Remuneration process when the employee is subject to regular decision.

Other: Use this value when changing social insurance data. For example, you can create a new effective-dated row to change the health insurance card number or pension fund number

Excluded: Excluded from social insurance premium deduction. Use this value to specify the employment record from which you do not want to deduct the social insurance premium if the payee meets both of the following conditions:

- The employment record number was changed in the middle of a month.
- The payee stayed in the same social insurance establishment.

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If you do not select an employment record, the system will deduct social insurance premiums from multiple employment records. You should create the data with the Effective Date set to the end date of the month previous to the month when the Employment Record changes.

SI Establishment Number (social insurance establishment number)
The system calculates the employee's premiums using the rates that you defined for the establishment you select here.

Maternity Leave
Select if the employee is on maternity leave. Social insurance premiums are not deducted for employees on maternity leave.

Part-time
Select if the employee works part-time. The system uses this value when calculating total monthly remuneration in the regular decision process and when creating the Monthly Standard Remuneration Regular report.

Amount of Monthly Remun (amount of monthly remuneration)
When the Change Reason is *New Enrollment, Re-enrollment,* or *New Enrollment after Loss* the system calculates this value as the sum of the monthly cash and non-cash remuneration.

The system updates this value when you run the Monthly Remuneration Update process. If the employee had a retroactive pay adjustment during the calculation period, the system enters the adjusted average monthly remuneration.

The system determines the employee's monthly standard remuneration and standard remuneration grades based on this value.

Monthly Cash Remun (monthly cash remuneration)
Enter the expected monthly cash remuneration when the payee is enrolled. The system uses this field to generate the Amount of Monthly Remun. This field becomes visible only when the Change Reason is *New Enrollment* or *Re-enrollment*.

Monthly Non-Cash Remun (monthly non-cash remuneration)
Enter the expected monthly non-cash remuneration when the payee is enrolled. The system uses this field to generate the Amount of Monthly Remun. This field becomes visible only when the Change Reason is *New Enrollment* or *Re-enrollment*.

Standard Remuneration and Grades

Displays the monthly standard remuneration and the standard remuneration grade based on the value in the Amount of Monthly Remun field for the effective date.

These values are display only and are not saved to a table.

Nursing Care Insurance

Special Insured
When you select this check box, nursing insurance is calculated and deducted, regardless of the age of the payee.

Excluded
When you select this check box, nursing insurance is not calculated and deducted, regardless of the age of the payee.

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Pension Insurance

Base Pension Number Enter the base pension number for the employee and the spouse, if applicable. These values are used by the enrollment, termination, and address change reports.

Base Pension Number for Spouse This value is for your information only. It is not used by the payroll system.

Eligibility for Voluntary Enrollment for Elderly Select if the employee is 70 or older and qualifies for payroll deduction of Employees Pension Insurance contribution. Use the PI 70 Year Old Employees report to identify employees who are terminated from pension insurance due to age.

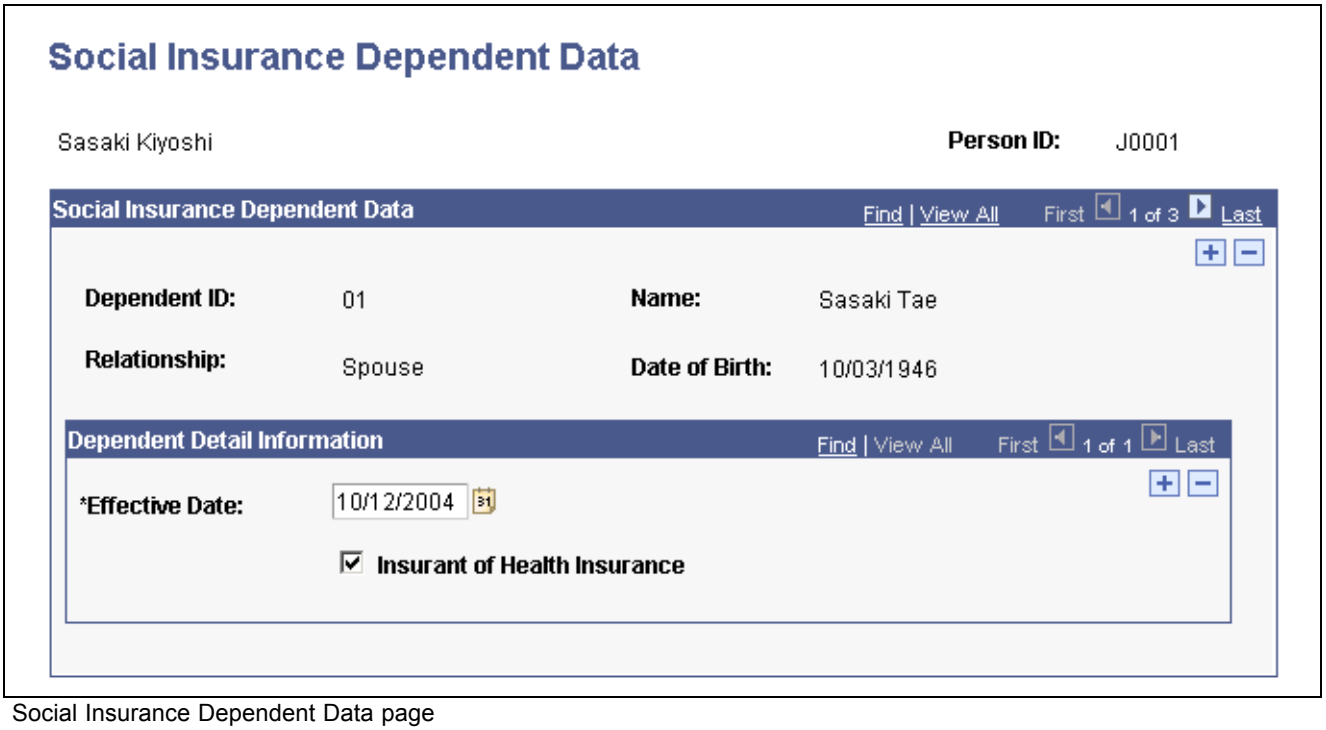
Updating Last Action

The system completes the following fields depending on how the data is entered or updated:

Field	Manually Entered	Automatically Entered
Last Action	Online user	System
Updated on	Current date	Process run date

Managing Social Insurance Dependent Data

Access the Social Insurance Dependent Data page.



Social Insurance Dependent Data page

Select Insurant of Health Insurance if the dependent is included in the employee's health insurance plan.

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Preparing for Monthly Standard Remuneration Reports

This section provides an overview of monthly standard remuneration reports and discusses how to:

- Run the Monthly Remuneration Load Process.
- View and Edit Monthly Remuneration Calculations.
- Update Employee Social Insurance Data.

Understanding Monthly Standard Remuneration Reports

The Monthly Remuneration Load process (GPJP_LD_REM) gathers information from Human Resources and Global Payroll tables and updates the Monthly Remuneration Results table (GPJP_MTHRMN_TBL). That table is the data source for one page and three monthly remuneration reports that are delivered by PeopleSoft. You can create your own Structured Query Reports (SQRs), service operations, or electronic data files that access data on the Monthly Remuneration Results table.

Here's how you prepare for monthly remuneration reporting:

1. Finalize the salary payroll run.
2. Run the Monthly Remuneration Load Application Engine process (GPJP_LD_REM).
3. View and correct results of the monthly remuneration calculations on the SI Monthly Remuneration Results page.
4. Run the following monthly standard remuneration reports:
   - Monthly Standard Remuneration Revised report.
   - Monthly Standard Remuneration Regular report (for June payroll only).
   - Monthly Standard Remuneration (summary) report (for June payroll only).
5. Run the Monthly Remuneration Update Application Engine process (GPJP_UPD_REM).

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Pages Used to Prepare for Monthly Standard Remuneration Reports

Page Name	Object Name	Navigation	Usage
Load SI Monthly Remun (load social insurance monthly remuneration)	GPJP_RC_SC_LOAD	Global Payroll & Absence Mgmt, Social Security / Insurance, Load SI Monthly Remun JPN, Load SI Monthly Remun	Run the monthly remuneration load process.
SI Monthly Remun Results (social insurance monthly remuneration results)	GPJP_SC_MTH_REMUN	Global Payroll & Absence Mgmt, Social Security / Insurance, Review SI Mthly Remun JPN, SI Monthly Remun Results	View and edit the monthly remuneration calculations for individual employees. The Monthly Remuneration Load Application Engine process loads and updates this page. The parameters that you enter in the process run control page determine which employees you can see on this page.
Update SI Monthly Remun (update social insurance monthly remuneration)	GPJP_RC_SC_LOAD	Global Payroll & Absence Mgmt, Social Security / Insurance, Update SI Monthly Remun JPN, Update SI Monthly Remun	Update employee social insurance data. Run the Monthly Remuneration Update process to update the amount of monthly remuneration on the Social Insurance Data page for employees whose subject indicator is Occasional Revision or Regular Decision.

Running the Monthly Remuneration Load Process

Access the Load SI Monthly Remun page.



Load SI Monthly Remun page

The Monthly Remuneration Load process loads the Monthly Remuneration Results table (GPJP_MTHRMN_TBL).

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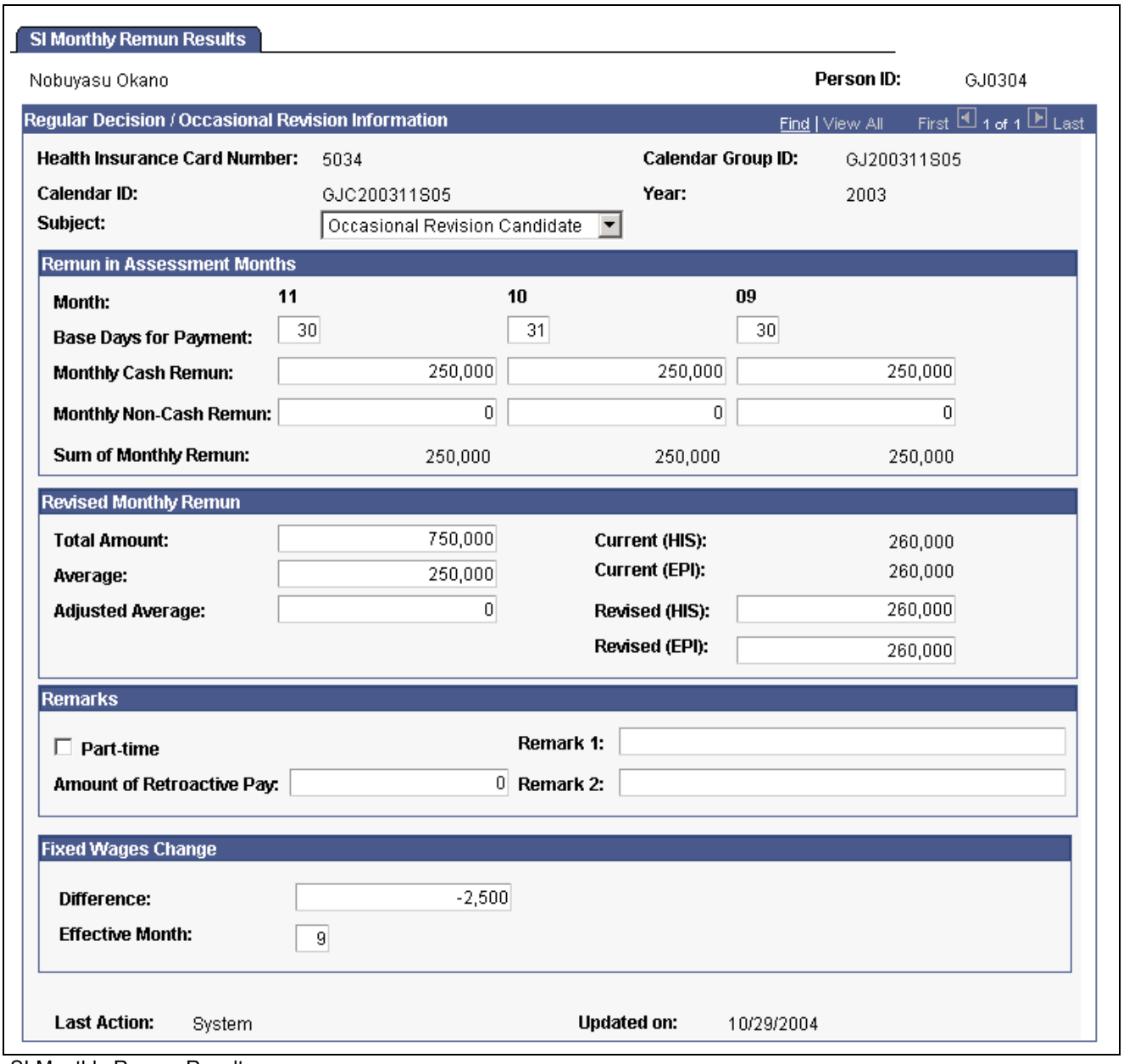
The payroll must be finalized for the calendar group ID that you select; otherwise, the system issues an error message. The process uses the payment dates to determine for which month the calendar group applies. The following table lists the eligibility subject indicators for which the process loads data according to the month of the calendar group ID:

Subject Indicator	Months Loaded
Occasional Revision	All months
Occasional Revision Candidate	All months
Regular Decision	June only

Viewing and Editing Monthly Remuneration Calculations

Access the SI Monthly Remun Results page.

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SI Monthly Remun Results page

An application engine will populate the fields on this page. You can edit many of them if needed.

Subject Displays whether the employee is subject to occasional revision or regular decision. Values include *Occasional Revision, Occasional Revision Candidate, Regular Decision,* and *Not Applicable.*

See Chapter 11, "Managing Social Insurance," Standard Remuneration Calculations, page 81.

Remuneration in Assessment Months

View or update the amount of cash and non-cash pay that is subject to social insurance premium for each month.

Month Displays the three months in the assessment period.

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Base Days for Payment Displays the number of days that were used to calculate the salary for the month.

Sum of Monthly Remun (sum of monthly remuneration) Displays the sum of cash and non-cash remuneration. This value is updated automatically when you change the value in the Monthly Cash Remun or Monthly Non-Cash Remun field.

Revised Monthly Remuneration

You can manually update the Total Amount, Average, and Revised (HIS and EPI) values in this group box. The system does not automatically recalculate the values of these fields even when you change the value in the Monthly Cash Remun or Monthly Non-Cash Remun fields. When you save the page, a warning message advises you to manually update these fields if values have changed.

Total Amount Displays the total remuneration for the assessment months during which the element worked sufficient work days.

Average Displays the average remuneration for the period.

Adjusted Average Displays the average remuneration for the period not including any retroactive amount for a month other than the assessment month.

Current (HIS) Displays the monthly standard remuneration for health insurance before regular decision or occasional revision.

Current (EPI) Displays the monthly standard remuneration for Employees' Pension Insurance before regular decision or occasional revision.

Revised (HIS) Displays the revised monthly standard remuneration for health insurance as determined by regular decision or occasional revision.

Revised (EPI) Displays the revised monthly standard remuneration for Employees' Pension Insurance as determined by regular decision or occasional revision.

Remarks

Amount of Retroactive Pay Displays the total amount of retroactive remuneration excluding the retroactive amount for a month that is excluded from the calculation due. Retroactive reduction appears as a negative amount.

Fixed Wages Change

Difference Displays the increase or decrease applied to the fixed wages. Decreases are accompanied by a negative.

Effective Month Enter the month when retroactivity occurs. This is not the month when the salary change occurs. For example, if a pay raise was given in April and applied to the April payment, the value would be 4. If the pay raise was given in May and applied to the April payment, the value would be 5.

The system completes the following fields depending on how the data is entered or updated:

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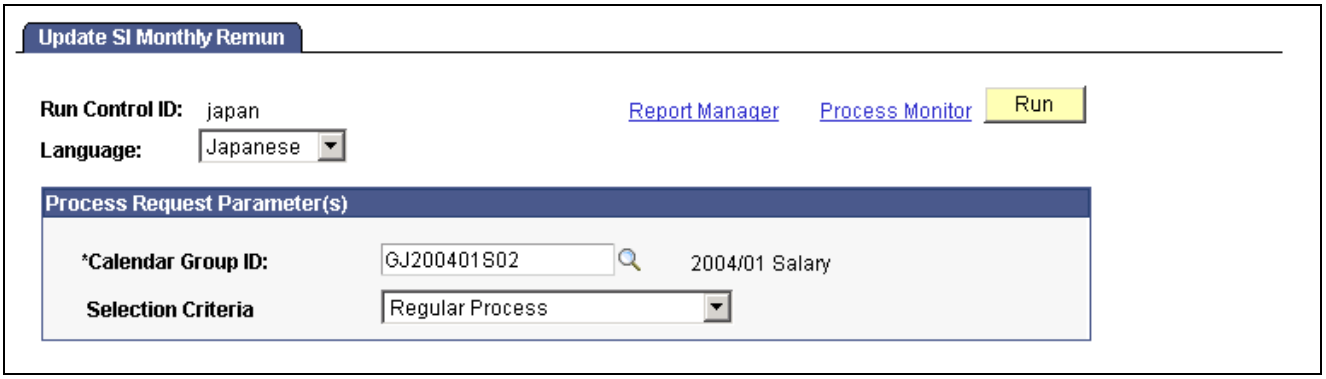
Field	Manually Entered	Automatically Entered
Last Action	Online user	System.
Updated on	Current date	Run date of the process.

See Also

Chapter 11, "Managing Social Insurance," Understanding Social Insurance Rules, page 81

Updating Employee Social Insurance Data

Access the Update SI Monthly Remun page.



Update SI Monthly Remun page

Run the Monthly Remuneration Update process to update the amount of monthly remuneration on the Social Insurance Data page for employees whose subject indicator is Occasional Revision or Regular Decision. Use the Selection Criteria field to select the monthly remuneration result data to be printed on the report.

This process uses the same run control page as the Monthly Remuneration Load process.

See Also

Chapter 11, "Managing Social Insurance," Running the Monthly Remuneration Load Process, page 93

Checking Social Insurance Calculations

This section provides an overview of social insurance calculation checks and discusses how to:

- Create the SI Premium Summary report.
- Create the SI Premium Inquiry report.

Understanding Social Insurance Calculation Checks

Global Payroll for Japan calculates social insurance premiums and creates the employee and employer deductions. The social insurance provider also calculates these premiums independently. The social insurance check report enables you to compare these values. To do so, you:

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1. Receive the premium payment documents from the provider.

   The provider should send a payment notification, detail statement, and a change statement for the previous month.

2. Compare the provider's data with your calculations using the SI Premium Summary report and the SI Premium Inquiry report.

   The SI Premium Summary report lists the following information for an establishment ID: employee and employer premium amounts for salary and bonus payments and the number of insurants by grade.

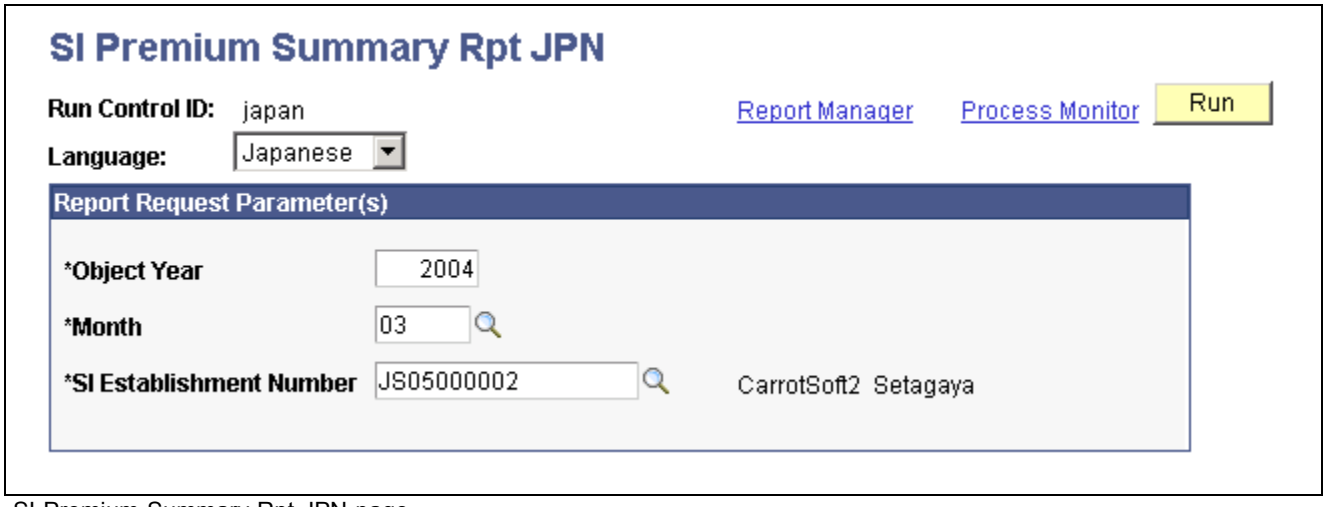
   The SI Premium Inquiry report lists, by establishment ID, those payees whose premiums have changed in the month.

Pages Used to View Premium Reports

Page Name	Object Name	Navigation	Usage
SI Premium Summary Rpt JPN (social insurance premium summary report Japan)	GPJP_RC_SC_GRD	Global Payroll & Absence Mgmt, Social Security/Insurance, SI Premium Summary Rpt JPN, SI Premium Summary Rpt JPN	Create the SI Premium Summary report to view information about the social insurance premiums and grades of all employees in an establishment.
SI Premium Inquiry Rpt JPN (social insurance premium inquiry report Japan)	GPJP_RC_SC_CHK	Global Payroll & Absence Mgmt, Social Security/Insurance, SI Premium Inquiry Rpt JPN, SI Premium Inquiry Rpt JPN	Create the Social Insurance Premium Inquiry report to view employee's whose premium data has changed in the between previous and current months.

Creating the SI Premium Summary Report

Access the SI Premium Summary Rpt JPN page.



SI Premium Summary Rpt JPN page

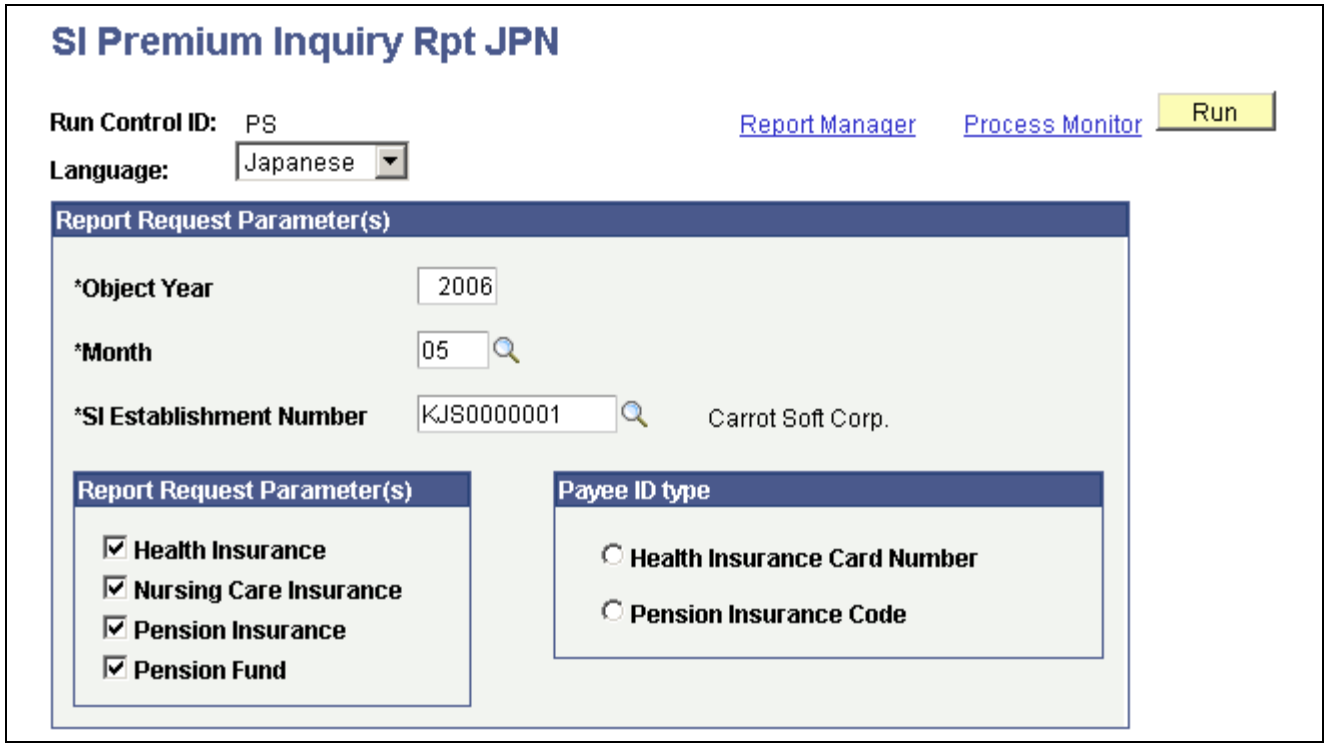
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Report Request Parameter(s)

Select the object year, month, and SI establishment for which you want to run the report. For example, if you would like to print the summary for the premium that is deducted and paid to the social insurance provider in March, you should select *03* for the Month.

Creating the Social Insurance Premium Inquiry Report

Access the SI Premium Inquiry Rpt JPN page.



SI Premium Inquiry Rpt JPN page

Object Year and **Month** Enter the month and year for which you want to run the report. For example, to report the difference between the premiums that are deducted and paid to the social insurance provider in February and March, you should select *03* for the Month.

Report Request Parameter(s)

Select an option to find the payees whose corresponding premiums have changed in the current month. Select multiple options to search for payees whose premiums have changed for all of the corresponding premiums. For example, if Health Insurance and Nursing Care Insurance are selected, the system lists the payees whose health insurance premium and nursing care premium have changed between the previous and current months.

If you do not select a parameter the report will display the social insurance premiums of all the payees, even when the premiums are unchanged.

Payee ID Type

Select the appropriate option depending on whether the report is submitted to health insurance-related agencies or pension insurance-related agencies.

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Running Social Insurance Reports

This section provides an overview of social insurance reports and lists the pages used to run them.

Understanding Social Insurance Reports

You can print the following reports:

- Monthly Standard Remuneration Revised report (GPJPSC01), which you submit monthly.
- Monthly Standard Remuneration Regular report (GPJPSC02), which you submit annually.
- A summary of monthly standard remuneration (GPJPSC03) that you can use to complete the Monthly Standard Remuneration Summary report.
- Bonus Payment Detail report (GPJPSC05).
- Bonus Payment Summary report (GPJPSC06).
- PI 70 Years Old Employees report (GPJPSC04), which you use to review and update the Eligibility for Voluntary Enrollment for Elderly field on the Social Insurance Data page.

The monthly standard remuneration reports are provided in the format for the Tokyo municipality. You can modify the format as required.

The following topics provide more details about these reports.

Monthly Standard Remuneration Revised Report

Submit this report to the social insurance provider after each salary pay run in which employees exist who are subject to occasional revision. The report lists the following information for all employees whose subject indicator is Occasional Revision (fixed wages increased or decreased two months ago resulting in a change of standard remuneration grade by two grades or more):

- Health card number, name, birth date, and type.
- Base days, cash, non-cash, and sum of remuneration for each of the three months in the assessment period.
- Total of monthly remuneration, as well as current and revised standard remuneration for health insurance and pension insurance.
- Amount of retroactive pay, difference of fixed wages, and effective month.

Monthly Standard Remuneration Regular Report

Submit this report to the social insurance provider annually by the tenth of July. The report lists the following information for employees whose subject indicator is Regular Decision:

- Health card number, name, birth date, and type.
- Base days, cash, non-cash, and sum of remuneration for April, May, and June of the current year.
- Total of monthly remuneration, as well as current and revised standard remuneration for health insurance and pension insurance.
- Amount of retroactive pay, difference of fixed wages, and effective month.

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Summary of Monthly Standard Remuneration Report

Use the information in this report to complete the Monthly Standard Remuneration Summary report that you submit annually to the social insurance provider with the Monthly Standard Remuneration Regular report. This report lists the following information for each establishment:

- The number of employees who became insured between June 1 and July 1.
- The number of employees submitting the Monthly Standard Remuneration Regular report.
- The number of employees who are subject to occasional revision in July.
- The health card number and name of each employee who might be subject to occasional revision in August and September.

Social Insurance Bonus Payment Detail Report

Submit this report each time a bonus is paid. This report lists:

- Health insurance card number, birth date, name, and type.
- The cash bonus amount.
- The non-cash bonus amount.
- The total bonus amount.

Social Insurance Bonus Payment Summary Report

Submit this report each time a bonus is paid. For each establishment number, this report lists:

- The number of bonus payees.
- The total amount of the bonus.
- The number of insured employees.

PI 70 Years Old Employees Report

The report lists employees who became ineligible for Employees' Pension Insurance premium due to reaching the age of 70, along with their names, employee IDs, genders, supervisor levels, and whether they are eligible for voluntary enrollment. It also lists, for each establishment number and department number if you specified these parameters, the total number of employees who became ineligible and the total number eligible for voluntary enrollment.

The report determines which employees are age 70 or over as of the date that you enter as the object date on the run control page.

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Pages Used to Run Social Insurance Reports

Page Name	Object Name	Navigation	Usage
SI Mthly Remun Rpt (Revised) (social insurance monthly remuneration report (revised))	GPJP_RC_SC01	Global Payroll & Absence Mgmt, Social Security / Insurance, SI Mthly Rev Remun Rpt JPN, SI Mthly Remun Rpt (Revised)	Run the Monthly Standard Remuneration Revised Report (GPJPSC01), which lists social insurance and remuneration information for all employees whose subject indicator is Occasional Revision.
SI Mthly Remun Rpt (Regular) (social insurance monthly remuneration report [regular])	GPJP_RC_SC03	Global Payroll & Absence Mgmt, Social Security / Insurance, ANN – SI Mthly Reg Remun Rpt JPN, SI Mthly Remun Rpt (Regular)	Run the Monthly Standard Remuneration Regular Report (GPJPSC02), which lists social insurance and remuneration information for all employees whose subject indicator is Regular Decision.
SI Mthly Remun Rpt (Summary) (social insurance monthly remuneration report [summary])	GPJP_RC_SC03	Global Payroll & Absence Mgmt, Social Security / Insurance, ANN – SI Mthly Sum Remun Rpt JPN, SI Mthly Remun Rpt (Summary)	Run the Monthly Standard Remuneration Summary Report (GPJPSC03), which summarizes information about employees who are subject to regular decision and occasional revision.
Bonus Payment Rpt (social insurance bonus payment report	GPJP_RC_SC_BNS	Global Payroll & Absence Mgmt, Social Security/Insurance, SI Bonus Payment Report JPN, Bonus Payment Rpt	List each payee's bonus amount.
PI 70 Years Old Employees Rpt JPN (pension insurance 70 years old employees report)	GPJP_RC_SC04	Global Payroll & Absence Mgmt, Social Security / Insurance, PI 70 Years Old EE Rpt JPN, PI 70 Years Old EE Rpt JPN	Run the Pension Termination Report (GPJPSC04), which lists employees who became ineligible for Employees' Pension Insurance premium due to reaching the age of 70.

Creating Social Insurance Report Data Files

This section provides an overview of social insurance report data files and discusses how to:

- Create remuneration report files.
- Create bonus report files.
- Create the enrollment, termination, and address change report files.

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Understanding Report Data Files

In addition to the printed reports listed previously, you can also submit some social insurance reports electronically. You can create the following files for the following reports:

- Monthly Standard Remuneration Revised report.
- Monthly Standard Remuneration Regular report.
- Bonus Payment report.
- Enrollment report.
- Termination report.
- Address change report.

Three processes, and therefore three run control pages, are used to create these files:

- Remuneration report file creation.
- Bonus report file creation.
- Other report file creation.

Each of these processes has the same basic structure. First, they select the report data from the appropriate tables. Next, the system validates the content and the format of the report files. Last, the system places the data to a file.

If errors are found during the validation step, the system creates a detailed log file for each error that is detected. The error file includes the record row number, employee ID, health insurance card number, name, report type, field name containing the error, and an error description. The error file name follows the format *gpjp_sc_det_log_process instance number*.csv.

When the data is placed in the file, commas are replaced with spaces. When creating the file handle, you should not use the extension .csv.

Remuneration Report Files

The process that is used to create both the Monthly Standard Remuneration Report (Regular) and the Monthly Standard Remuneration Calculation Report (Revised) selects rows from the Monthly Remuneration Results Record (GPJP_MTHRMN_TBL), whose object date (GPJP_OBJECT_DATE) and social insurance establishment (GPJP_TAX_ESTAB) match the values on the SI Create Remun Rpt File JPN page. The selected rows are extracted and used to create the report file.

Additionally, for the Monthly Standard Remun Calc Report (Revised), the process selects rows where the subject indicator (GPJP_SUBJECT_IND) is occasional revision. For the Monthly Standard Remun Calc Report (Regular), the process selects rows where GPJP_SUBJECT_IND is regular decision.

Note. Prior to creating the remuneration report files, you must run the load social insurance monthly remuneration process.

Bonus Report Files

The process used to create the bonus report file selects data from the Global Payroll result table (GPJP_WA_PIN) for the payees who are insured as of the end of the bonus payment month. The selected rows are extracted and used to create the report file.

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Other Report Files

The process that is used to create the enrollment report, termination report, and address change report files selects data from the employee social insurance payee table (GPJP_SC_PYE_DTA) where the effective date is within the period and the SI establishment is equal to the value that is selected on the SI Create Other Report File page.

In addition, the change reason should match the following criteria for each file:

Data File	Change Reason
Enrollment Report	New enrollment. Re-enrollment.
Termination Report	Loss by Death. Loss by Age. Loss by Other Reason.

To create the Address Change report data file, the system looks for the following conditions:

- An active row is on the Address table (ADDRESSES) whose effective date is between the period that is specified on the SI Create Other Report File page and the address type is *Home.*
- For the effective date of the active row used above, an effective row is on the social insurance payee table whose change reason is not *Excluded.*
- No row is on the social insurance payee table whose effective date is equal to the address row listed previously whose change reason is *New Enrollment* or *Re-enrollment.*

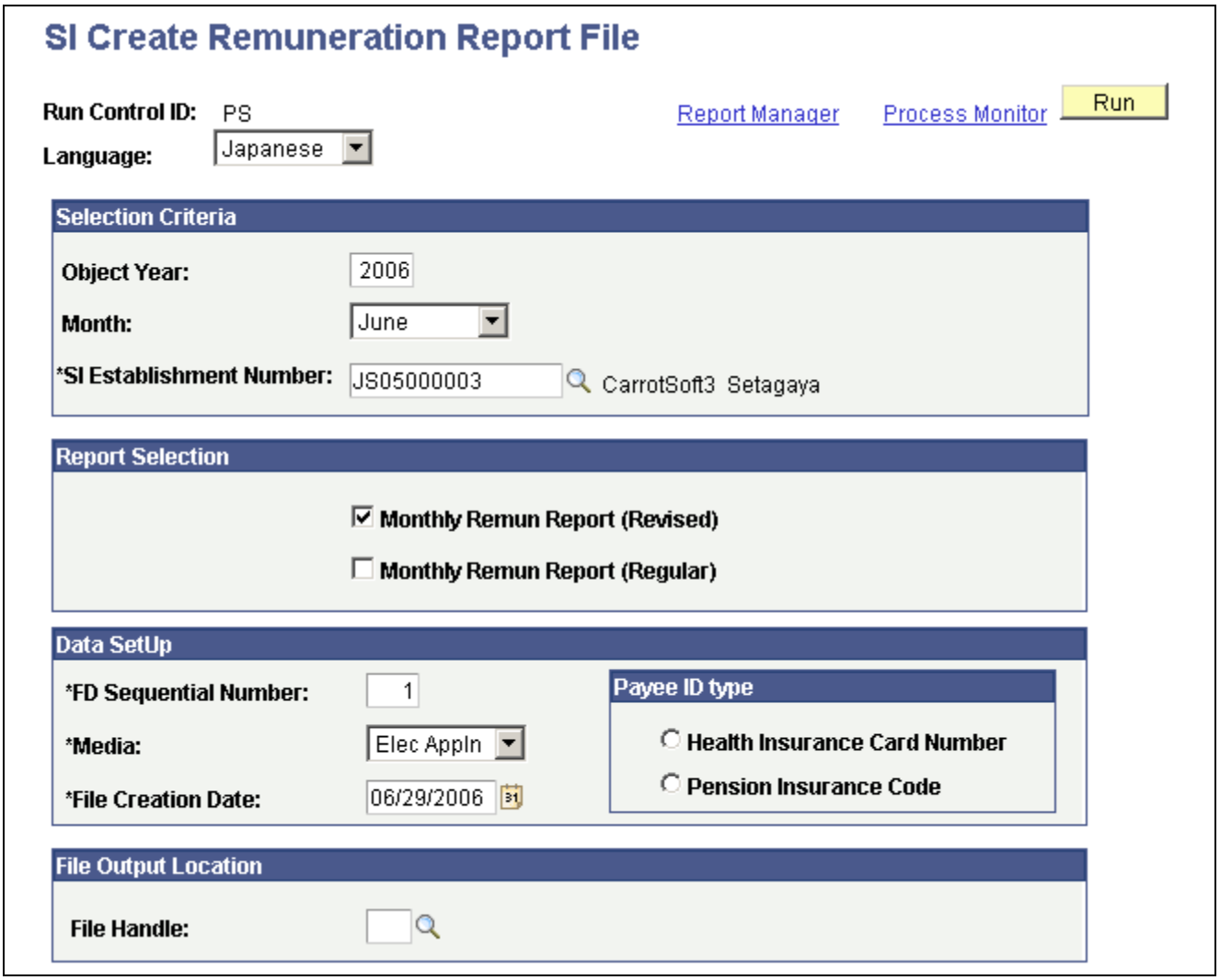
Pages Used to Create Social Insurance Report Data Files

Page Name	Object Name	Navigation	Usage
SI Create Remuneration Report File (social insurance create remuneration report file)	GPJP_RC_SC_RPT1	Global Payroll & Absence Mgmt, Social Security/Insurance, SI Create Remun Rpt File JPN, SI Create Remuneration Report File	Create the report files for the Monthly Standard Remuneration Report (Revised) and the Monthly Standard Remuneration Report (Regular).
SI Create Bonus Report File (social insurance create bonus report file)	GPJP_RC_SC_BNS2	Global Payroll & Absence Mgmt, Social Security/Insurance, SI Create Bonus Rpt File JPN, SI Create Bonus Report File	Create the bonus report file.
SI Create Other Report File (social insurance create other report file)	GPJP_RC_SC_RPT2	Global Payroll & Absence Mgmt, Social Security/Insurance, SI Create Other Report File JPN, SI Create Other Report File	Create the enrollment, termination, and address change report files.

Creating Remuneration Report Files

Access the SI Create Remuneration Report File page.

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SI Create Remuneration Report File page

Report Selection

Select which report data to use when creating the file.

Payee ID Type

Select the appropriate option depending on whether the report is submitted to health insurance-related agencies or pension insurance-related agencies.

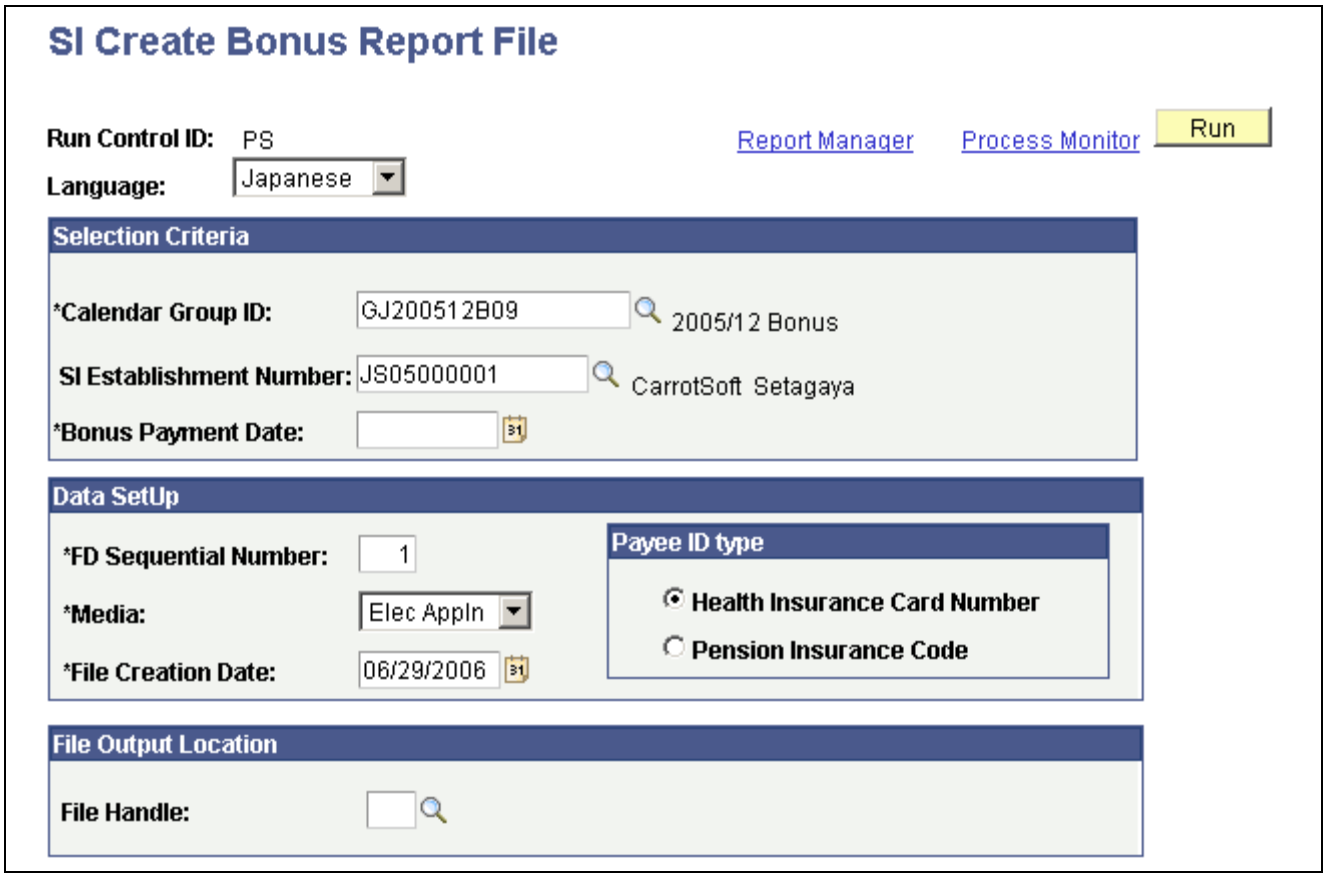
File Output Location

File Handle Select a predefined file handle.

Creating Bonus Report Files

Access the SI Create Bonus Report File page.

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SI Create Bonus Report File page

Payee ID Type

Select the appropriate option depending on whether the report is submitted to health insurance-related agencies or pension insurance-related agencies.

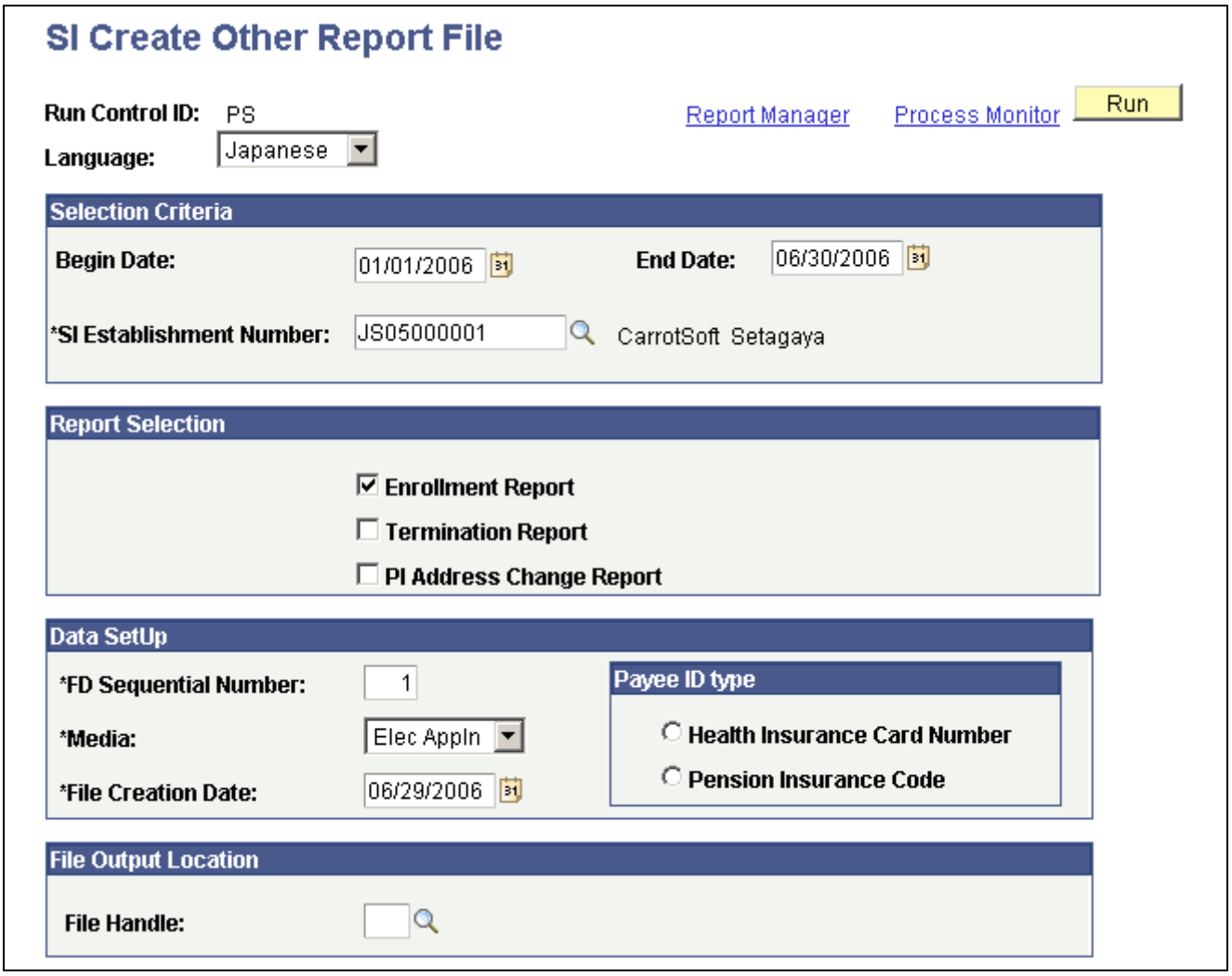
File Output Location

File Handle Select a predefined file handle.

Creating the Enrollment, Termination, and Address Change Report Files

Access the SI Create Other Report File page.

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SI Create Other Report File page

Report Selection

Select which report data to use when creating the file.

Payee ID Type

Select the appropriate option depending on whether the report is submitted to health insurance-related agencies or pension insurance-related agencies.

File Output Location

File Handle Select a predefined file handle.

Preparing for Social Insurance Premium Payment

Use the Global Payroll generic reporting functionality to prepare a report of earnings and deductions that you can use to review the amount of social insurance premium to be submitted to the insurance provider each month.

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See Also

Appendix A, “Global Payroll for Japan Reports,” Running Generic Global Payroll Reports for Japan, page 188

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CHAPTER 12

Managing Labor Insurance

This chapter provides an overview of labor insurance rules and discusses how to:

- Enter labor insurance information.
- Enter and view labor insurance report data.
- Run labor insurance reports.

Understanding Labor Insurance Rules

This section discusses:

- Delivered elements for calculating labor insurance premiums.
- Delivered elements for determining exemption for age.
- Delivered elements for tracking short time labor insured.
- Viewing delivered elements.

Delivered Elements for Calculating Labor Insurance Premiums

PeopleSoft delivers elements for calculating the payee and payer contributions to employment insurance premiums.

Payees' Labor Insurance Premiums

The following elements are used to calculate payee's employment insurance premiums:

- Deduction elements LA EMP SAL and LA EMP BON for processing labor insurance deductions for salary or bonus.
- Variables for three employment insurance industry types: Type A, Type B (agriculture, forestry, fishery, and winery), and Type B(Cs) (construction).
- Bracket for determining the employment insurance rate for industry Types A and B, when the total amount of wages is between 92,000 JPY and 484,000 JPY.
- Variables and formula for calculating the employment insurance premium when the amount of total wages falls outside the bracket.

Payer's Labor Insurance Premiums

The following elements are used to calculate the payer's contribution to labor insurance:

- Variable element LA VR CALC ER FLG, which determines whether to calculate the payer's contribution. The default value is 0 (do not calculate).

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- Variables for industry types (the same those that are used for payee's contributions).
- Bracket for determining the employment insurance rate of the payer's contribution for the three industry types.
- Variable LA VR WKRCMP RT, which holds the workers compensation insurance rate.
- Variable LA VR EMPL INS CO for the calculated employment insurance premium of the payer's contribution.
- Variable LA VR WKR COMP for the calculated workers compensation insurance premium.
- Writable array GPJP_WA_SCRPT that holds the calculated results for labor insurance of the payer's contribution (LA VR EMPL INS CO and LA VR WKR COMP).

Delivered Elements for Determining Exemption for Age

PeopleSoft delivers date elements, durations, formulas, variables, and generation control to determine whether the employee is over age 64 on April 1 and, if so, to prevent the premium deduction.

Delivered Elements for Tracking Short Time Labor Insured

A delivered variable tracks short time workers for reporting purposes. Use this information to submit the Status Change report when an employee changes to or from short time insured worker status and to determine the contents of the unemployment certificate.

Viewing Delivered Elements

The PeopleSoft system delivers a query that you can run to view the names of all delivered elements designed for Japan. Instructions for running the query are provided in the *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Viewing Delivered Elements"

Entering Labor Insurance Information

This section provides an overview of setting up labor insurance information and discusses how to enter labor insurance data.

Understanding Labor Insurance Information Setup

You must enter some data into the system before you calculate labor insurance premiums.

Setting up labor insurance data includes these steps:

1. Define labor insurance establishments on the Labor Ins Estab page.

   Select the industry type for each labor insurance establishment.

2. Set up employee labor insurance data on the Labor Insurance Data page.

   If an employee has multiple jobs and receives separate payments for each job, enter labor insurance data for each job separately.

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Labor insurance data will be deducted for each of the employee's job record.

Page Used to Enter Labor Insurance Data

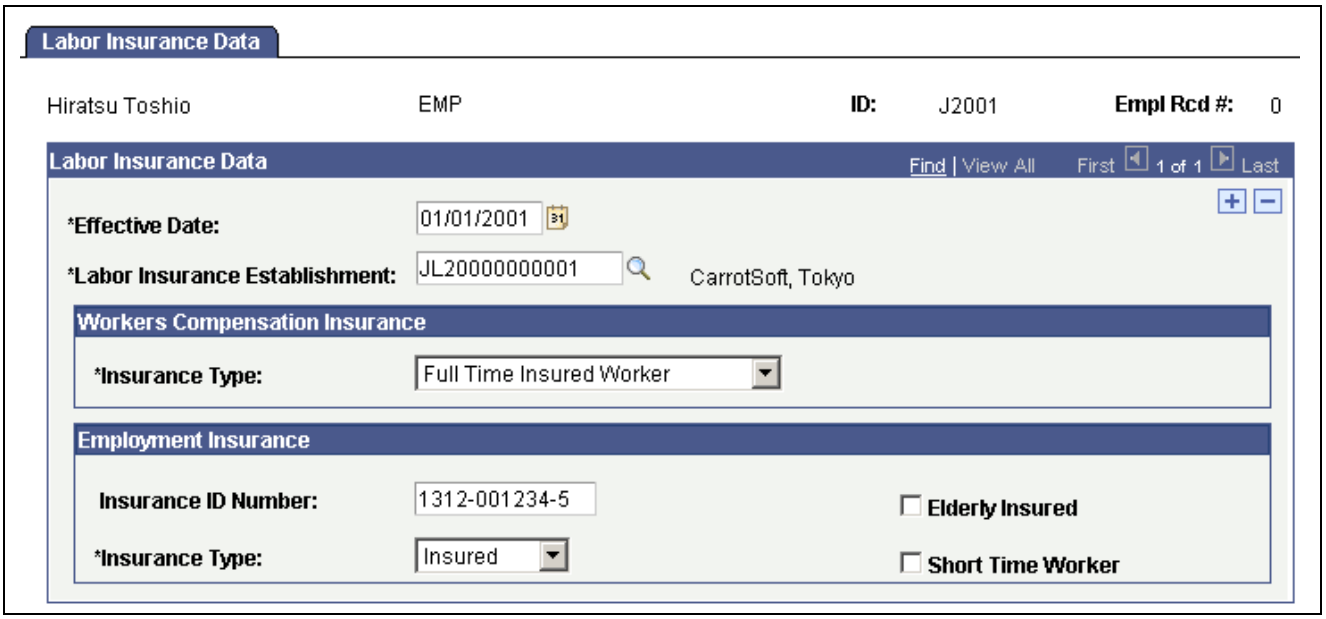
Page Name	Object Name	Navigation	Usage
Labor Insurance Data	GPJP_LA_PYE_DATA	Global Payroll & Absence Mgmt, Payee Data, Social Security/Insurance, Maintain Labor Ins Data JPN, Labor Insurance Data	Enter labor insurance data for all job records of each employee.

See Also

Chapter 4, "Setting Up Insurance, Taxes, and Payslips," Setting Up Tax and Insurance Establishments, page 22

Entering Labor Insurance Data

Access the Labor Insurance Data page.



Labor Insurance Data page

Workers Compensation Insurance

Insurance Type *Full Time Insured Worker, Insured Officer, Temporary Insured Worker,* and *Exclusion.*

Select *Exclusion* when a payment, such as a director's remuneration, is not subject to workers compensation insurance.

Employment Insurance

Insurance Type *Insured:* Ordinary worker who is eligible for employment insurance.

Officer: Officers who work as employees and are eligible for employment insurance.

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Exclusion: Any other payees who are not eligible for employment insurance, such as payees whose standard hours are less than 20 per week.

Note. Employees with insurance type *Officer* and *Insured* are subject to the deduction of employment insurance premiums unless their age is 64 or more at the time of payment. The age is determined by the system and is not affected by the value of the Elderly Insured check box. Global Payroll for Japan does not support voluntary elderly insured.

Elderly Insured Select if the payee's employment insurance type is *Officer* or *Insured* and the payee is categorized as *Elderly Insured* in the Annual Basic Employment Premium report. Use the Annual Employment Insurance Exempt report to help identify employees to be categorized as elderly insured.

Short Time Worker Select if the payee's employment insurance type is *Officer* or *Insured* and the payee needs to be categorized as a short time worker.

Entering and Viewing Labor Insurance Report Data

This section provides an overview of the process for entering labor insurance data and discusses how to enter labor insurance report data .

Understanding Labor Insurance Report Data

Global Payroll for Japan provides pages for capturing the data that you will use to manually complete the following labor insurance reports:

- Enrollment report.
- Termination report.
- Status Change report.
- Transfer (Move In) report.
- Name Change report.

To enter data for the reports:

1. Complete the relevant fields on the Maintain Labor Insurance Report Data page.

   Note. To determine which fields to complete for a given report, select the report type and click the View Report link.

2. Click the View Report link at the bottom of the page.

   The page that appears depends on the value that you selected in the Report Type field on the Maintain Labor Insurance Report Data page.

3. Review for accuracy.

   The system automatically converts dates to the imperial format. It also displays the reporting code that corresponds to certain values that you selected on the Maintain Labor Insurance Report Data page.

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After confirming that your entries are correct, copy the data into the reports. The online report pages display data in the approximate order in which you enter the data on the OCR report forms defined by the government.

Note. If an employee has multiple jobs that are paid separately, enter labor insurance report data separately for each job.

Common Elements Used in This Section

Enrollment Date Displays the effective date entered on the Maintain Labor Insurance Report Data page when the report type is enrollment.

Monthly Wage Displays the value that you entered in the Estimated Monthly Wage field on the Maintain Labor Insurance Report page, divided by 1000 (without the fractions).

Standard Hours Displays the number of standard hours and minutes for the payee as they appear on the Job Information page.

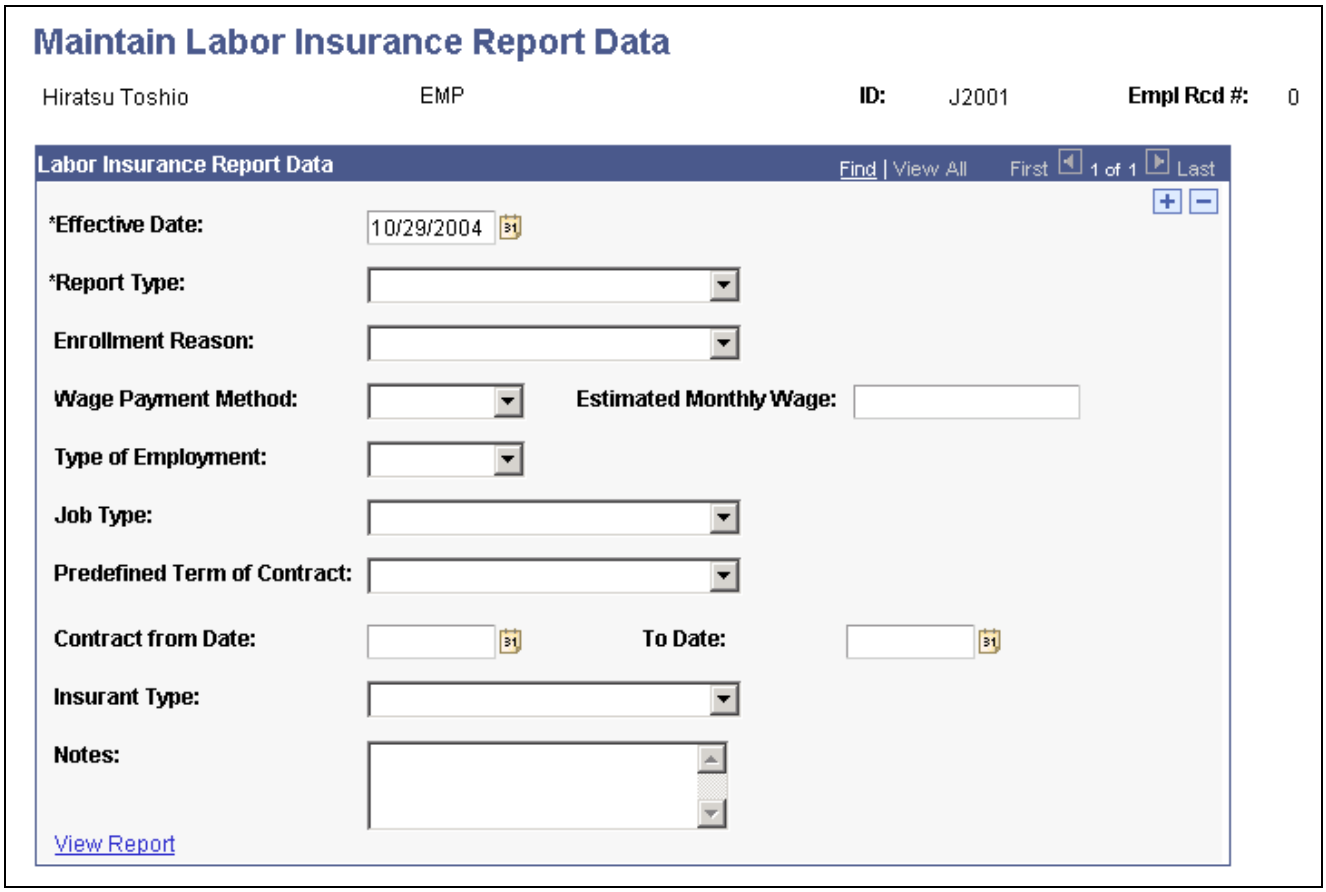
Pages Used to Enter and View Labor Insurance Report Data

Page Name	Object Name	Navigation	Usage
Maintain Labor Insurance Report Data	GPJP_LA_PYE_RPT	Global Payroll & Absence Mgmt, Payee Data, Social Security/Insurance, Maintain Lab Ins Rpt Data JPN, Maintain Labor Insurance Report Data	Enter data for labor insurance reports.
Enrollment Report	GPJP_LA_PYE_RPT1	Click the View Report link on the Maintain Labor Insurance Report Data page. (You must select enrollment as the Report Type on that page.)	Displays data that you can copy to the Enrollment report.
Name Change/Termination Report	GPJP_LA_PYE_RPT2	Click the View Report link on the Maintain Labor Insurance Report Data page. (You must select Name Change or Termination as the Report Type on that page.)	Displays data you can copy to the Termination report or Name Change report.
Transfer/Status Change Report	GPJP_LA_PYE_RPT3	Click the View Report link on the Maintain Labor Insurance Report Data page. (You must select Transfer or Status Change as the Report Type on that page.)	Displays data that you can copy to the Transfer report or Status Change report.

Entering General Data for Labor Insurance Reports

Access the Maintain Labor Insurance Report Data page.

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Maintain Labor Insurance Report Data page

Report Type Select from the following report types: *Enrollment*, *Name Change*, *Status Change*, *Termination*, *Transfer*. The selected value determines which page appears when you click the View Report link.

Enrollment Reason Values are: *Change from Daily Laborer*, *New Hire (New Graduates)*, *New Hire (Others)*, *Others*, *Return to Home Company*.

Contract from Date and **To Date** The contract's begin and end dates are required if you select *Contract term, and no renewal* condition or *Contract term, and renewal condition* in the Predefined Term of Contract field.

Notes Use this field to enter notes. For example, you can explain why there is no renewal condition, the reason for insurance ineligibility, or if an unemployment certificate is needed.

View Report Click to access a page where you can view the data that you entered for the selected report type.

Displaying Enrollment Report Data

Access the Enrollment Report Data page.

Report Type Displays *10101* for the enrollment report. (Global Payroll for Japan does not support report type 10162.)

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Hire Type Displays a value or 1 or 2, depending on your selection in the Type of Employment field on the Maintain Labor Insurance Report Data page. If you selected *New Hire (New Graduates)* or *New Hire (Others)*, the system displays *1*; for the other selections, it displays *2*.

Change Reason Displays a value of 1, 2, 3, 4, or 8, depending on your selection in the Enrollment Reason field on the Maintain Labor Insurance Report Data page.

Displaying Name Change and Termination Report Data

Access the Name Change/Termination Report Data page.

AC Name (alternate character name) Displays the AC name for the day previous to the effective date that appears on the Maintain Labor Insurance Report Data page.

New AC Name (new alternate character name) Displays the current AC name.

Report Type Displays *10102* for the name change report or *10103* for the termination report. (Global Payroll for Japan does not support report type 10190 for name changes or 10191 for terminations.)

As of Date For the termination report, this field displays the date prior to the effective date that is entered on the Maintain Labor Insurance Report Data page. This field is hidden for the name change report.

Displaying Transfer and Status Change Report Data

Access the Transfer/Status Change Report page.

Report Type Displays *10106* for the transfer report or *10107* for the status change report.

Prev Labor Ins Estab No (previous labor insurance establishment number) Displays the labor insurance establishment number prior to the effective date of the transfer. The system retrieves the number from the Labor Insurance Payee Data table.

Running Labor Insurance Reports

This section provides overviews of labor insurance reports, lists prerequisites, and discusses how to run the following reports:

- Employment Insurance Premium Exempt report.
- Basic Employment Insurance Premium report.
- Newly Enrolled Employee report.

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Understanding the Employment Insurance Exempt Report (GPJPLA01)

This report lists employees who are 64 years of age or older as of April 1 of the object year you select on the run control page. It provides their employee IDs, departments, supervisor level, birth dates, and genders. The report also lists the total number of exempt employees in each department and establishment if you select these parameters.

If any employees listed in this report are elderly insured, select the Elderly Insured check box on the Labor Insurance Data page.

Understanding the Basic Employment Insurance Premium Report (GPJPLA02)

This report helps you complete the Insurance Premium report that you must submit each May. All 12 payroll runs for the insurance year (April 1 through March 31) must be finalized before you run this report.

For both workers compensation insurance and employment insurance, the report lists the number of workers and wages attributed to salary and bonus, as well as the total for each insurance type (full time insured worker, insured officer, and so on). It provides the grand totals for workers compensation insurance and for employment insurance, including and excluding the elderly insured.

The report lists data for the period April 1 of the previous year through March 31 of the object year you select on the run control page.

Understanding the Newly Enrolled Employee Report (GPJPLA03)

When you run the Newly Enrolled Employee Report, the system produces:

- A PDF version of the Newly Enrolled Employee Report (GPJPLA03).
- A summary log file (GPJP_LA03_sum.csv).

  This file contains the labor insurance establishment details, file creation date, total number of employees in the data file, and the number of errors detected in the data file.
- A data file (shutoku.csv).

  This file contains the details of the employees who are newly enrolled as of the run control date.
- A detail log file (GPJP_LA03_dtl.csv).

  This file contains the employee ID, name, the field in which the error is present, and the error details.

To submit enrollment data to the Employment Security Office, you can complete a separate paper report for each employee by copying enrollment report data from the Enrollment Report page. Alternatively, you can submit these three items: the csv data file, the Newly Enrolled Employee report (GPJPLA03), and a summary report. To prepare the summary report, copy data from the summary log file to the preprinted form supplied by the Employment Security office.

Prerequisite to Running the Newly Enrolled Employee Report

Before you can run the Newly Enrolled Employee report, you must create a file handle. Although you're required to enter a file name when you create the file handle, the system does not use this name when it generates the files. It applies the naming convention described in the following table:

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File	Naming Convention
Data file	shutoku + (job instance) + .csv
Summary log	gpjp_la03_sum_ + (job instance) + .csv
Detail log	gpjp_la03_dtl_ + (Job Instance) + .csv

See Also

Chapter 3, "Defining Country Data," Setting Up File Handles, page 20

Pages Used to Run Labor Insurance Reports

Page Name	Object Name	Navigation	Usage
EI Exempt Report (employment insurance exempt report)	GPJP_RC_LA01	Global Payroll & Absence Mgmt, Social Security/Insurance, ANN – EI Exempt Report JPN, EI Exempt Report	Run the Employment Insurance Exempt Report (GPJPLA01), which lists employees who are exempt from labor insurance premium because of age.
Basic EI Premium Report (basic employment insurance premium report)	GPJP_RC_LA01	Global Payroll & Absence Mgmt, Social Security/Insurance, ANN – Basic EI Premium Rpt JPN, Basic EI Premium Report	Run the Basic Employment Insurance Premium report (GPJPLA02), which provides the workers compensation and employment insurance wage information you need to complete the Insurance Premium report that you must submit each May.
EI Newly Enrolled Employee Report	GPJP_RC_LA_PYE_RPT	Global Payroll & Absence Mgmt, Social Security/Insurance, EI Newly Enroll Empl Rpt JPN, EI Newly Enrolled Employee Report	Generates the Newly Enrolled Employee report (GPJPLA03), data file, summary log file, and detail log file.

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CHAPTER 13

Managing Inhabitant Tax

This chapter provides overview of the inhabitant tax business process and discusses how to:

- Set up the Inhabitant Tax table.
- Load Inhabitant Tax data.
- Print the Monthly Inhabitant Tax report.
- Manage the Inhabitant Tax payment files.

Understanding the Inhabitant Tax Business Process

PeopleSoft Enterprise Global Payroll for Japan provides rules, pages, processes, and reports that you use to:

- Set up the Inhabitant Tax table, which holds municipality and recipient-number data for employees as well as inhabitant-tax monthly amounts.
- Prepare Wage Payment reports and summaries for municipalities.
- Load inhabitant tax amounts and individual numbers that are received from the municipalities either manually or through a data load process.
- Deduct inhabitant tax amounts from monthly salary.
- Prepare monthly inhabitant tax reports for municipalities.

Note. The PeopleSoft Enterprise system delivers a query that you can run to view the names of all delivered elements that are designed for Japan. Instructions for running the query are provided in the *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*

See *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*, "Viewing Delivered Elements," Understanding How to View Delivered Elements.

See Chapter 16, "Preparing Year-End Adjustment," Running Year-End Reports, page 165.

Object Year

Object Year generally refers to the year for which you want to run a process or generate a report. When this PeopleBook discusses inhabitant tax, object year is defined like this: The municipality provides monthly inhabitant tax amounts for a period that runs from June 1 to May 31 of the following year. The object year is the year in which June 1 falls.

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Understanding How to Maintain the Inhabitant Tax Table

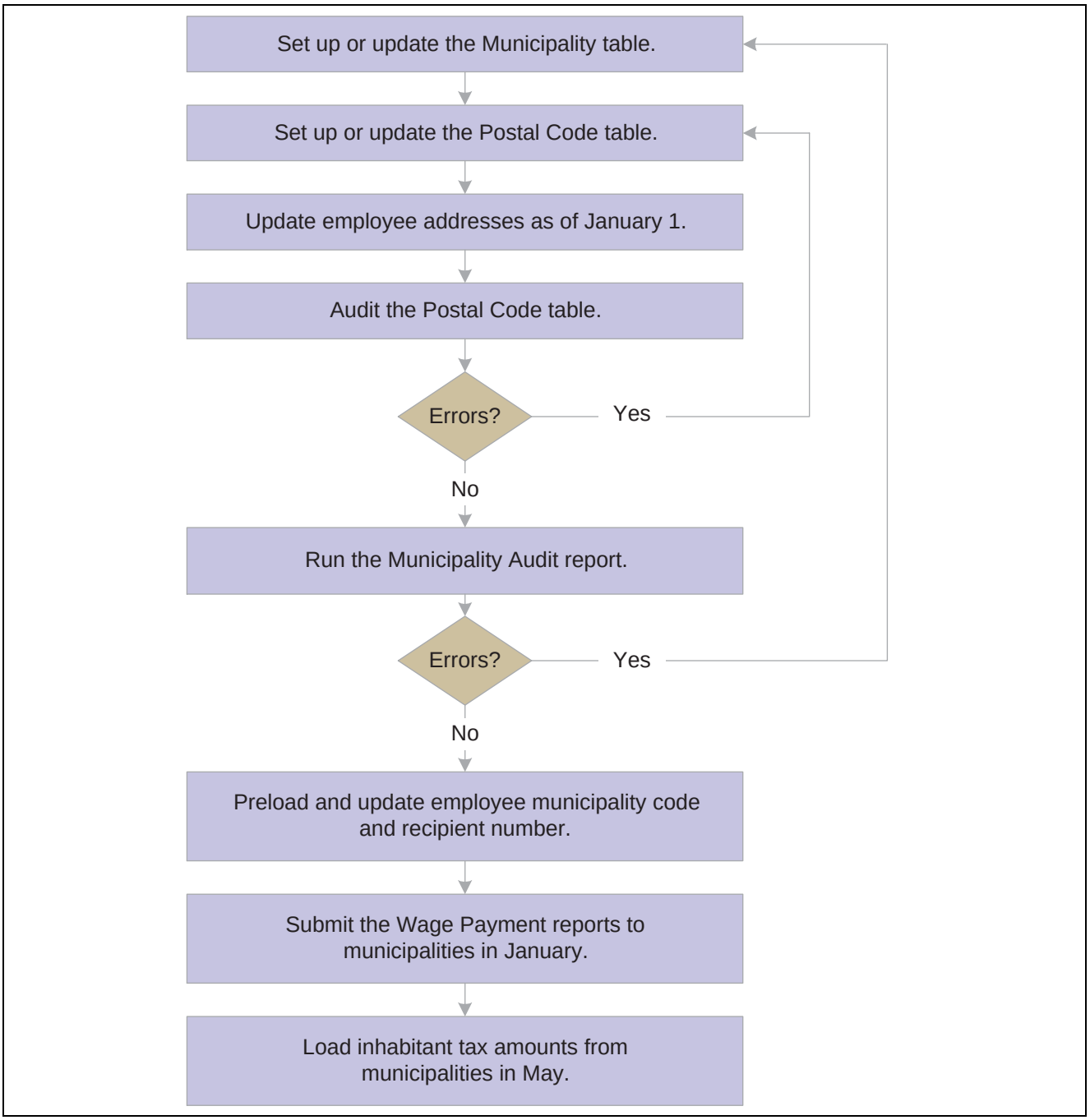
The Inhabitant Tax table (GPJP_IH_PYE_TAX) includes effective-dated rows for each employee who is paying inhabitant tax. This row includes employee ID, employment record number, recipient number, individual number, municipality code, previous employment last month, and special collection amount. Inhabitant Tax will be deducted only from one Job Record of an employee for each payment that the employee receives.

To determine an employee's inhabitant tax, the system first creates a relationship between the postal code in which employees live and the municipalities that charge inhabitant tax. This requires a correlation between the municipality table and the postal code table. The Blank Municipality Audit Report query identifies postal codes that are not associated with municipality codes. After this relationship is established, a connection exists between the employee and the municipality.

When the employee-municipality relationship has been identified, you can create the Inhabitant Tax table. You will populate the table with tax amounts either by loading data electronically using the Load Inhabitant Tax process (GPJP_IHMUN2) or by entering the data manually.

This diagram illustrates the process of maintaining the Inhabitant Tax table:

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Maintaining the Inhabitant Tax table

The following list provides more details about maintaining the Inhabitant Tax table:

1. Associate municipality codes with tax establishments and taxpayer-specified numbers on the Municipality table.
2. Associate municipality codes with postal codes on the Postal Code table.
3. Update employee addresses as of January 1 of the object year.
4. Run the Blank Municipality Audit Report query to identify postal codes that do not have a municipality code in the Japan Postal Code table.

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Add missing municipality codes to the Japan Postal Code table.

5. Run the Municipality Audit report to check for invalid postal codes in employee addresses.
    a. Correct errors that are reported by the audit report.
    b. Rerun the audit report until all errors are corrected.
    c. Correct all errors before you run the Pre-Load Inhabitant Tax process (GPJP_IHMUN1).
6. Run the Pre-Load Inhabitant Tax process.

    The process loads each employee's municipality code and recipient number into the Inhabitant Tax table with the effective date of June 1 of the object year.

    Edit recipient numbers and employment record number for the object year on the Inhabitant Tax Data page, if necessary.
7. Send updated Wage Payment reports with summary to each municipality by the end of January of the object year.
8. Load employee inhabitant tax amounts and individual numbers that are provided by the municipality in May of the object year.
    - To load data from a printed list, manually enter tax amounts on the Inhabitant Tax Data page.
    - To load data from an electronic file, use the Load Inhabitant Tax process (GPJP_IHMUN2).

See Also

Chapter 16, "Preparing Year-End Adjustment," Running Year-End Reports, page 165

Prerequisites

Before processing inhabitant tax, perform these setup steps:

1. Associate municipality codes with tax establishments and taxpayer-specified numbers on the Municipality Table page.
2. Associate municipality codes with postal codes on the Postal Code Table page.
3. Define a file handle for each municipality's electronic file that you want to load directly into the Inhabitant Tax table. Use the File Handle Table page.

    You do not have to do this step if you load inhabitant tax amounts manually.

See Also

Chapter 4, "Setting Up Insurance, Taxes, and Payslips," Setting Up for Inhabitant Tax Processing, page 29

Setting Up the Inhabitant Tax Table

This section provides an overview of the Pre-Load Inhabitant Tax process and discusses how to:

- Identify and correct blank municipality codes on the Japan Postal Code table.
- Run the Pre-Load Inhabitant Tax process.

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Understanding the Pre-Load Inhabitant Tax Process

The Pre-Load Inhabitant Tax process (GPJP_IHMUN1) selects employees by the specified salary payer reference number. It loads their municipality codes and recipient numbers into the Inhabitant Tax table with the effective date of June 1 of the object year. You can view and update or correct the results of this process on the Inhabitant Tax Data page.

Municipality Code

The process selects the municipality code in the Postal Code table based on the postal code that is in the employee's legal address record as of January 1 of the object year. If the employee does not have a legal address, the process uses the postal code that is in the home address record.

Employment Record Number

If a row of Inhabitant Tax data already exists, then the employment record of the new row is updated with the employment record of the old row. If no row exists, then the record that has a tax type of KOU is selected for tax deductions for the newly inserted row. If no record with tax type KOU exists, then the minimum Job Record with a Pay System Flag of GP is selected for tax deductions for the newly inserted row.

Recipient Number

The process loads each employee's recipient number in the following way:

- Implementation year.

  The process enters the employee ID as the recipient number. You must correct the recipient number manually if the recipient number is different from the employee ID.

- Subsequent years.

  The process looks up the municipality code of the object year. It compares that municipality code with the employee's municipality code existing in the Inhabitant Tax record of the previous year.

  - If the municipality codes do not match, the process assigns a new recipient number.
  - If the municipality codes match, the process carries forward the recipient number.

Cautions About Running the Process

Before running this process, be sure to run the Blank Municipality Audit Report query and the Municipality Audit Report, and correct all postal code errors.

You can run this process only once for each salary-payer reference number and object year. If you try to run it a second time, the process halts with an error message.

Auditing and Correcting Postal Code Errors

Run the Municipality Audit report to find postal code errors in employee address records as of January 1 of the object year. When looking up the postal code, the process first looks to the legal address. If the employee does not have a legal address, the process looks to the home address.

The following table shows the possible error messages and the method of correction:

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Error Message	Correction
Unregistered Municipality Code.	The postal code does not have an associated municipality code in the Postal Code table. Update the Postal Code table.
Municipality Code does not exist on Municipality Table.	If the code is valid, add it to the Municipality table and associate it with the postal code on the Postal Code table.
Postal Code does not exist on the Postal Code Table.	Correct the employee's postal code on the Personal Address table.
Unregistered Postal Code.	The postal code is missing from employee address data. Add the postal code to the employee's data in the Personal Address table.

Pages Used to Set Up the Inhabitant Tax Table

Page Name	Object Name	Navigation	Usage
Query Manager	QRY_SELECT	Reporting Tools, Query, Query Manager, Query Manager	Identify and correct blank municipality codes on the Japan Postal Code table. Run the Blank Municipality Audit Report query to identify postal codes that do not have a municipality code in the Japan Postal Code table.
Municipality Audit	GPJP_RC_IH_AUD	Global Payroll & Absence Mgmt, Taxes, Municipality Audit Rpt JPN, Municipality Audit	Audit and correct postal code errors. Run the Municipality Audit report, which lists error messages for employees with invalid postal codes in their legal (or home) addresses.
Pre-Load Inhabitant Tax	GPJP_RC_IH_MUN1	Global Payroll & Absence Mgmt, Taxes, Pre-Load Inhabitant Tax JPN, Pre-Load Inhabitant Tax	Run the Pre-Load Inhabitant Tax process to load the employee, municipality, and recipient numbers for the object year into the Inhabitant Tax table.

Identifying and Correcting Blank Municipality Codes on the Japan Postal Code Table

Access the Query Manager page.

To identify and correct blank municipality codes on the Japan Postal Code table:

1. Search for the GPJP_AUDIT_BLANK_MUNIC query.

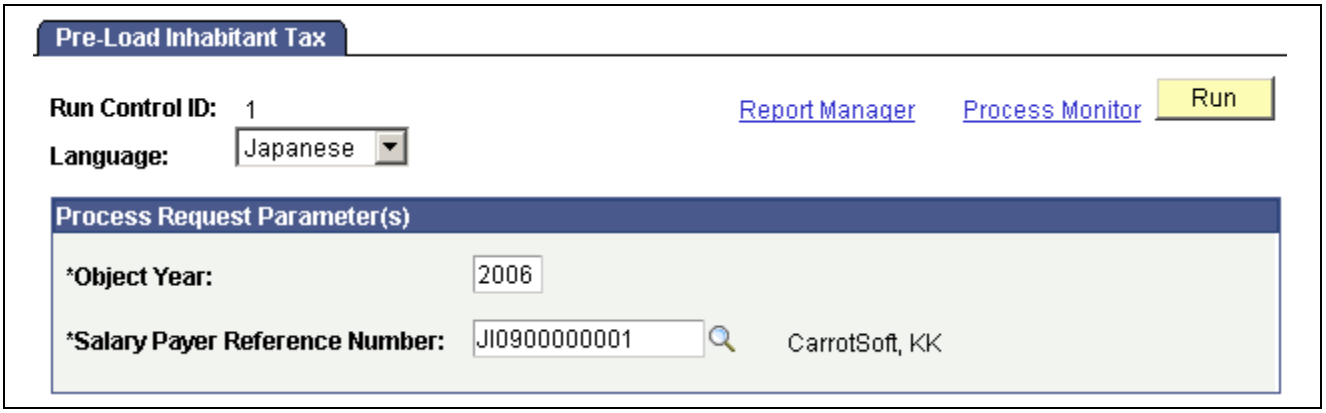
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2. Run the query.
3. View the list of postal codes for which the municipality code is blank.

Note. Correct the missing municipality codes on the Japan Postal Code table before running the Pre-Load Inhabitant Tax process.

Running the Pre-Load Inhabitant Tax Process

Access the Pre-Load Inhabitant Tax page.



Pre-Load Inhabitant Tax page

Object Year The default is the current year.

Salary Payer Reference Number The process selects all employees who are reported to the municipality for the salary payer reference number that is entered here.

See Also

Chapter 13, "Managing Inhabitant Tax," Understanding the Pre-Load Inhabitant Tax Process, page 123

Loading Inhabitant Tax Data

This section provides an overview of loading inhabitant tax data and discusses how to:

- Update inhabitant tax data and manually enter tax amounts.
- View year-to-date inhabitant tax amounts.
- Load inhabitant tax amounts from electronic files.

Understanding Loading Inhabitant Tax Data

You can either enter the inhabitant tax amounts manually or load the tax amounts from an electronic file.

After a payee's inhabitant tax data is loaded, the data can be changed through the reloading process. You can overwrite or delete the data when the status is Updated by User.

When loading inhabitant tax data, you can:

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- Load the file that was sent from a Municipal office into the table.
- Modify the rows that were loaded by the process, if necessary.
- Create new rows, especially for new employees whose information has not yet been submitted to the Municipal office.

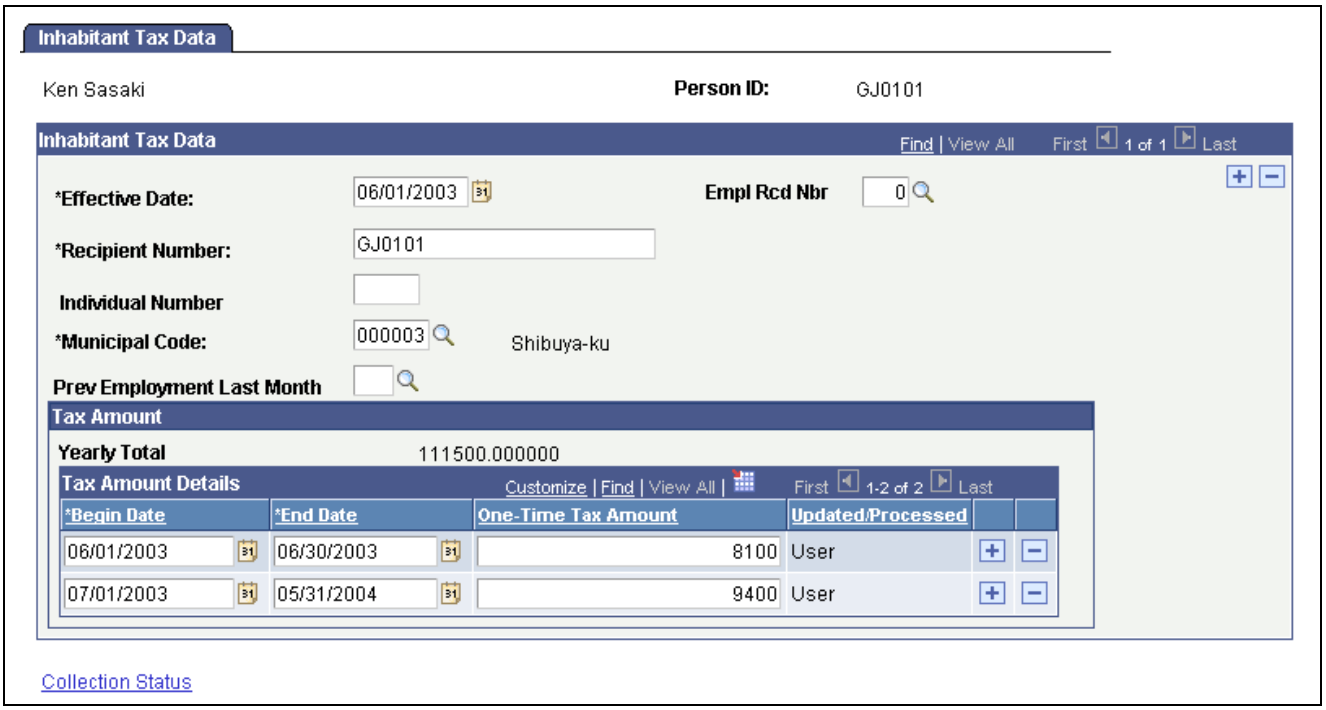
Pages Used to Load Inhabitant Tax Data

Page Name	Object Name	Navigation	Usage
Inhabitant Tax Data	GPJP_IH_PYE_TAX	Global Payroll & Absence Mgmt, Payee Data, Taxes, Maintain Inhab Tax Data JPN, Inhabitant Tax Data	Update inhabitant tax data. View and correct recipient numbers after running the Pre-Load Inhabitant Tax process. Enter inhabitant tax data for new hires, if necessary. Enter the employment record number from which the tax needs to be deducted. Enter one-time collection of balance for employees who terminate, if necessary. Manually enter inhabitant tax amounts from the municipality if you do not use the electronic file load process.
Collection Status Details	GPJP_IH_COL_STAT	Click the Collection Status link on the Inhabitant Tax Data page.	View the year-to-date inhabitant tax amounts for each employee.
Load Inhabitant Tax	GPJP_RC_IH_MUN2	Global Payroll & Absence Mgmt, Taxes, Load Inhabitant Tax JPN, Load Inhabitant Tax	Load inhabitant tax amounts from electronic file. Run the Load Inhabitant Tax process to load the tax amounts from the municipality if you are using electronic file data.

Updating Inhabitant Tax Data and Manually Entering Tax Amounts

Access the Inhabitant Tax Data page.

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Inhabitant Tax Data page

Effective Date The Pre-Load Inhabitant Tax process sets this date to June 1 of the object year for employees who are reported to the municipality. Use June 1 of the object year for manual entry of Inhabitant Tax Data for new hires regardless of their actual dates of hire.

Empl Rcd Nbr (employment record number) Select the record number of the employment record from which you want to collect inhabitant tax data.

Recipient Number If the employee ID is not the correct recipient number, you can change it.

Individual Number View the value that was loaded by the Load Inhabitant Tax process.

Municipal Code A value that is based on the employee's postal code as of January 1 of the object year.

Prev Employment Last Month (previous employment last month) Enter the last month that the previous employer paid inhabitant tax. Use this field if the payee was hired during the object year.

Tax Amount Details

One-Time Tax Amount Enter the monthly amount of the employee's inhabitant tax deduction for the salary for which payment falls between the begin date and end date.

When you manually enter the tax amount for new hires, enter the first and last day of the month in the Begin Date and End Date fields respectively.

Viewing Year-to-Date Inhabitant Tax Amounts

Access the Collection Status Details page.

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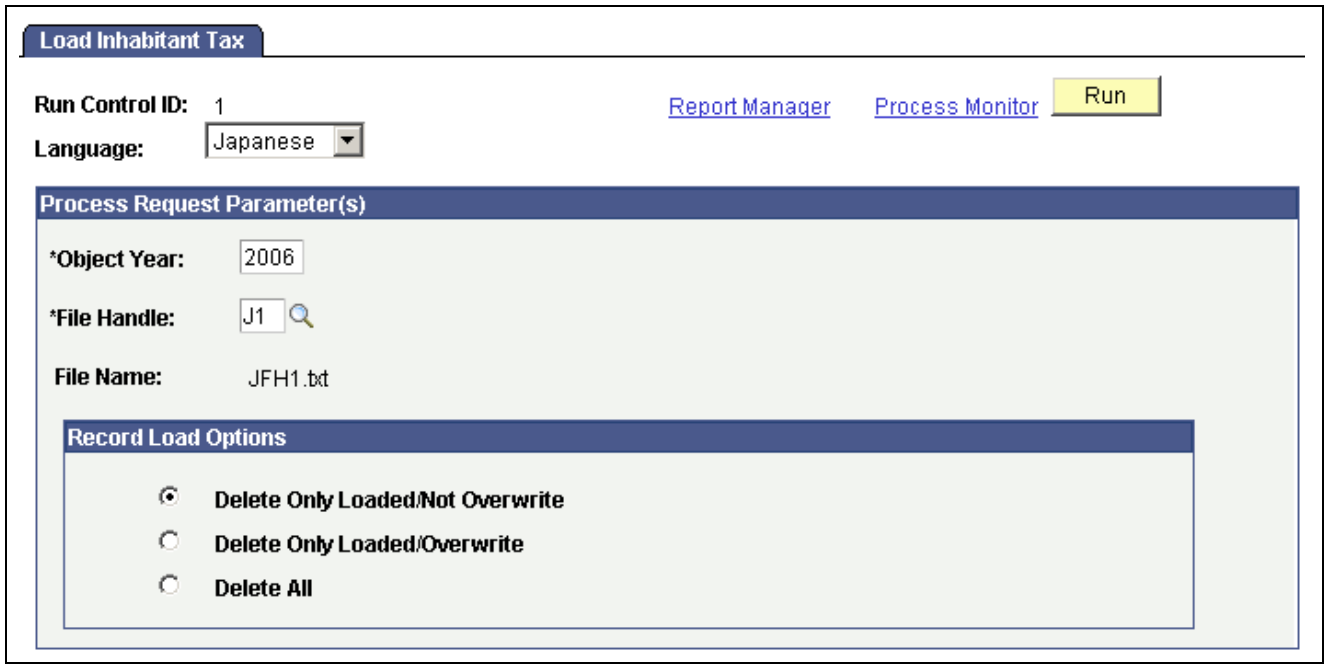
Collection Status Details page

This page summarizes the data that you need in order to complete the Change of Status Report on Special Collection.

Loading Inhabitant Tax Amounts from Electronic Files

Access the Load Inhabitant Tax page.

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Load Inhabitant Tax page

Object Year The current year is the default.

File Handle Select the file handle that identifies the municipality file that you want to load to the Inhabitant Tax table.

Note. PeopleSoft Enterprise Global Payroll for Japan provides the file layout for the Tokyo municipality as a model. You can modify the layout for other municipalities using Application Designer.

Record Load Options

Delete Only Loaded/Not Overwrite Select to reload the file that was sent from a Municipal office into the table without overwriting user modifications and new rows.

Delete Only Loaded/Overwrite Select to reload the file that was sent from a Municipal office into the table and overwrite user modifications without overwriting the new rows.

Delete All Select to reload the file that was sent from a Municipal office into the table and overwrite all user modifications and new rows.

See Also

Chapter 3, “Defining Country Data,” Setting Up File Handles, page 20

Printing the Inhabitant Tax Report

This section lists the page that you use to print the Monthly Inhabitant Tax report.

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Page Used to Print the Monthly Inhabitant Tax Report

Page Name	Object Name	Navigation	Usage
Monthly Inhabitant Tax Report	GPJP_RC_IH_MNTH	Global Payroll & Absence Mgmt, Taxes, Mthly Inhabitant Tax Rpt JPN, Monthly Inhabitant Tax Report	Print the Monthly Inhabitant Tax report (GPJPIH02), which provides the number of inhabitant tax collections and the total amount collected for each municipality for each pay period.

Managing the Inhabitant Tax Payment File

This section provides an overview of the inhabitant tax payment file and discusses how to:

- Load the inhabitant tax payment file.
- View and maintain inhabitant tax payment data.
- Create the inhabitant tax payment file.

Understanding Inhabitant Tax Payment Files

Companies whose employees live in only a limited number of municipalities may be able to successfully administer inhabitant tax payments directly to municipal government offices. On the other hand, larger companies often use banking services to administer inhabitant tax payments on their behalf. Companies that decide to use these banking services report this to the municipal governments. PeopleSoft Enterprise Global Payroll for Japan enables you to create a file to facilitate inhabitant tax payments by banks. This feature supports the standardized format that is defined by the Regional Banks Association of Japan.

After payroll is finalized and appropriate adjustments are made, you run a process that creates a banking file that summarizes inhabitant tax amounts sorted by municipal government. The file contains data for both the salary-based inhabitant taxes and the retirement allowance-based amounts. You submit this information to a single bank that transfers these tax payments to the respective municipal governments. Companies must transfer the file by the tenth day of each month following the calculation and deduction of inhabitant taxes.

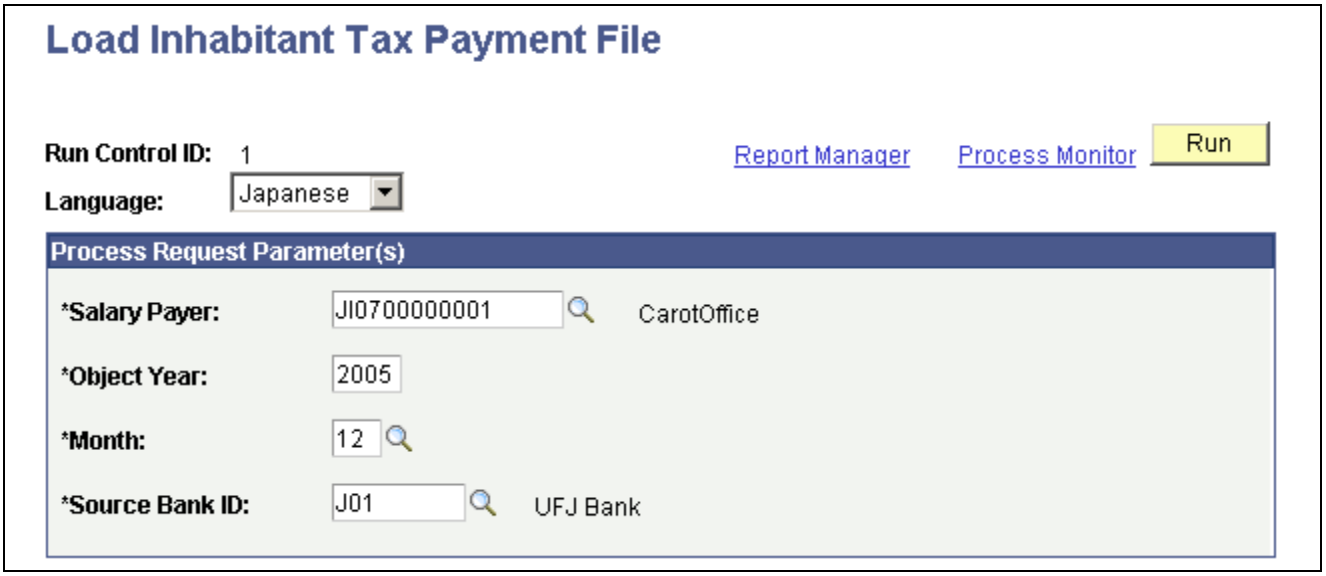
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Pages Used to Manage the Inhabitant Tax Payment File

Page Name	Object Name	Navigation	Usage
Load Inhabitant Tax Payment File	GPJP_RC_IH_T_LDE	Global Payroll & Absence Mgmt, Payment Processing, Load IH Tax Payment Data JPN, Load Inhabitant Tax Payment File	Request the load inhabitant tax data payment file process.
Inhabitant Tax Payment Data	GPJP_IH_TAX_DATA	Global Payroll & Absence Mgmt, Payment Processing, Maintain IH Tax File Data JPN, Inhabitant Tax Payment Data	View and modify the inhabitant tax payment data by municipal code.
Create Inhabitant Tax Payment File	GPJP_RC_IH_T_GEN	Global Payroll & Absence Mgmt, Payment Processing, Create IH Tax File JPN, Create Inhabitant Tax Payment File	Process request for creating Inhabitant Tax Payment file.

Requesting the Load Inhabitant Tax Payment File Process

Access the Load Inhabitant Tax Payment File page.



Load Inhabitant Tax Payment File page

Salary Payer Select the Tax Establishment ID for which to load the inhabitant tax payment file.

Object Year The year tax is paid.

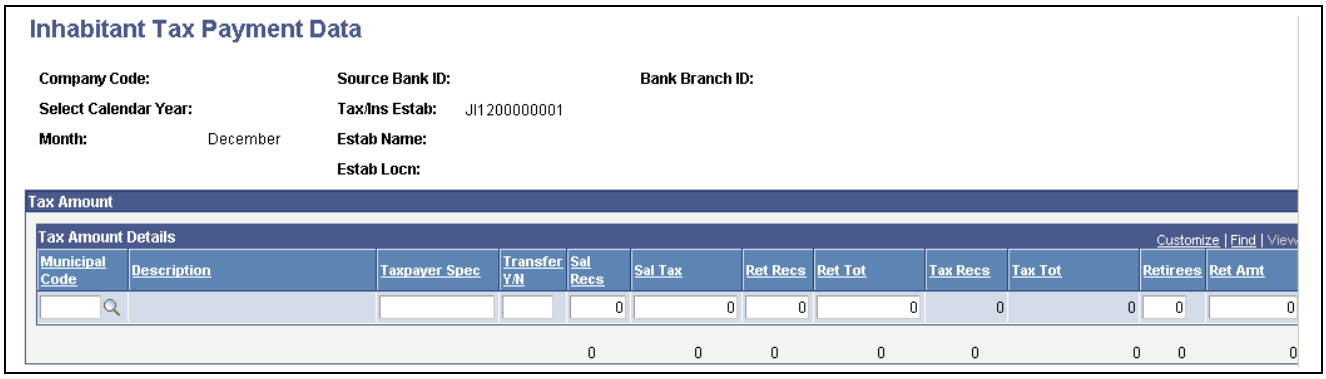
Month The month for which the tax is paid. For example, you select June for the inhabitant tax that was deducted in June and must be paid by July 10.

Source Bank Select the source bank.

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Viewing and Maintaining Inhabitant Tax Payment Data

Access the Inhabitant Tax Payment Data page.



Inhabitant Tax Payment Data page

Municipal Code Displays the Municipal Code ID from the Municipality Table page .

Description Name of the municipal government.

Taxpayer Spec (taxpayer specified) Taxpayer specified number.

Transfer Y/N Transfer flag.

Sal Recs (salary records) Number of tax records from salary.

Sal Tax (salary tax) Tax amount from salary.

Ret Recs (retirement records) Number of tax records from retirement allowance.

Ret Tot (retirement total) Tax amount from retirement allowance.

Tax Recs (tax records) Total number of tax records.

Tax Tot (tax totals) Sum of tax amounts from salary and tax amounts from retirement allowance.

Retirees Number of retired employees.

Ret Amt (retirement amount) Amount of retirement allowance.

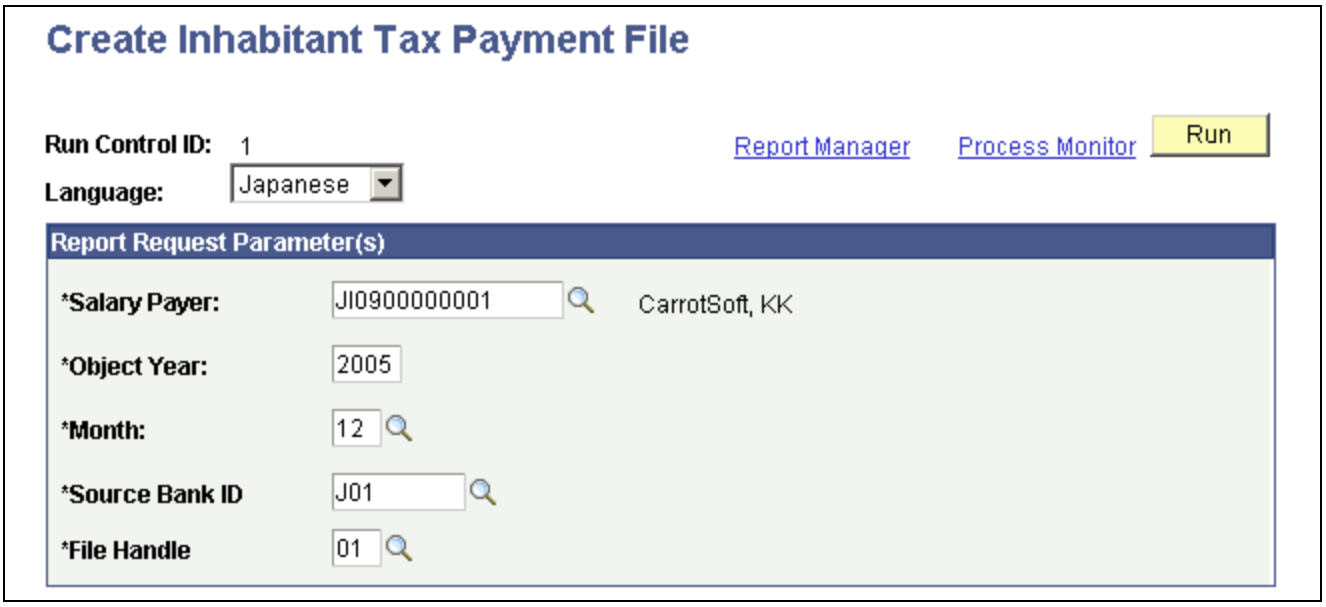
Tax Amt (tax amount) Municipal tax amount.

Prfctr Amt (prefecture amount) Prefecture amount.

Creating the Inhabitant Tax Payment File

Access the Create Inhabitant Tax Payment File page.

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Create Inhabitant Tax Payment File page

Salary Payer Select the Tax Establishment ID.

Object Year The year tax is paid.

Month The month tax is paid.

Source Bank ID The bank from which the funds will be paid.

File Handle Select the output format.

Note. The prerequisite for running this process is to have source data is already loaded. If the data is not loaded, an error message will be generated.

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CHAPTER 14

Withholding Income Tax

This chapter provides an overview of income tax withholding and discusses how to:

- Prepare for income tax withholding.
- Process the Withholding Tax Register.
- View delivered income tax deductions.

Understanding Income Tax Withholding

Global Payroll for Japan provides rules to calculate and deduct income tax from both salary and bonus payments. It also enables you to calculate income tax for employees with multiple jobs.

Income Tax on Salary

The rules for the KOU type income tax include the following:

- Data input pages and elements to calculate the adjusted number of dependents and the dependents deduction.
- Elements to calculate net salary pay.
- Determination of the tax amount using the calculation formula IN FM SAL MAC KO or the monthly income tax table lookup formula IN FM SAL TBL KO, as specified for each salary payer.

The rules for the OTSU type income tax include the following:

- Elements to calculate net salary pay.
- Determination of tax amount using the monthly income tax table lookup formula IN FM SAL TBL OT.

Note. Applying dependent deductions to OTSU salary is highly unusual, but is supported by the application.

Income Tax on Bonus

Tax on a bonus is usually calculated based on the previous month's salary. In cases where the bonus amount is more than ten times the previous month's salary, both the previous month's salary and the bonus amount are used to calculate the tax. In cases where the payee received no salary in the previous month, the bonus amount is used to calculate the tax.

The rules for income tax on bonuses accomplish the following:

- Determine whether to base the tax on the previous month's salary, both the previous month's salary and the bonus amount , or on the bonus amount itself.
- Calculate the adjusted number of dependents for the KOU type.
- Determine the tax on the bonus from the KOU or the OTSU bonus income tax rate tables.

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Income Tax for Multiple Jobs

The rules for calculating income tax for employees with multiple jobs include the following:

- The user must create income tax data for each employment record.
- Income tax is calculated by each employment record based on the corresponding income tax data.
- Only one employment record can have tax type KOU at a time. On the other hand, multiple employment records can use OTSU and a designated rate.
- An employee cannot claim a deduction for the same dependent on multiple jobs at the same time.

  Each dependent can be claimed only once per employee.

Prerequisite

Set up salary payer reference numbers, and specify the calculation method for KOU type income tax on the Tax Establishment page.

See Also

Chapter 4, “Setting Up Insurance, Taxes, and Payslips,” page 21

Preparing for Income Tax Withholding

This section provides overviews of income tax withholding preparation and dependent deductions and discusses how to:

- Enter employee income tax data.
- Enter dependent income tax data.

Understanding Income Tax Withholding Preparation

Enter the following data into the system before processing income tax withholding:

1. Enter income tax data for each employee on the Income Tax Data page.
2. Enter dependent data.
   - Enter dependent identification, relationship to employee, and birth date on the Dependent Data pages in PeopleSoft Enterprise Human Resources.
   - Specify whether the dependent is subject to deduction, whether he or she is a parent living with the payee, and the disability type on the Dependent Tax Data page.

Understanding Dependent Deductions

Global Payroll for Japan recognizes three types of employees from the standpoint of withholding tax. The employee’s type is determined by which Dependent Deduction report the employee submits to the organization.

The following table defines each employee type and discusses how to set up data on the Income Tax Data and Dependent Tax Data pages:

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Type of Dependent Deduction Report Submitted	Income Tax Data Page: Income Tax Type field	Dependent Tax Page
Dependent Deduction report for *primary* salary.	Select *KOU*.	Enter the dependent data as submitted on the Dependent Deduction report.
Dependent Deduction report for *secondary* salary.	Select *OTSU*.	Enter the dependent data as submitted on the Dependent Deduction report.
No Dependent Deduction report submitted.	Select *OTSU*.	Do not enter any dependent tax information.

Note. The system processes dependent deductions based on the combinations in the preceding table. If you select *OTSU* as the tax type and define dependent deductions on the Dependent Tax Data page, the system assumes that the deductions are for a secondary salary and calculates deductions accordingly. Do not enter dependent deduction information if you did not receive a Dependent Deduction report from the payee.

Pages Used to Set Up Income Tax Withholding

Page Name	Object Name	Navigation	Usage
Income Tax Data	GPJP_IT_PYE_TAX	Global Payroll & Absence Mgmt, Payee Data, Taxes, Maintain Income Tax Data JPN, Income Tax Data	Enter employee income tax data, such as salary payer number, employee type, and disability information.
Dependent Tax Data	GPJP_IT_DEP_TAX	Global Payroll & Absence Mgmt, Payee Data, Taxes, Maintain Dep Tax Data JPN, Dependent Tax Data	Enter dependent tax data.

See Also

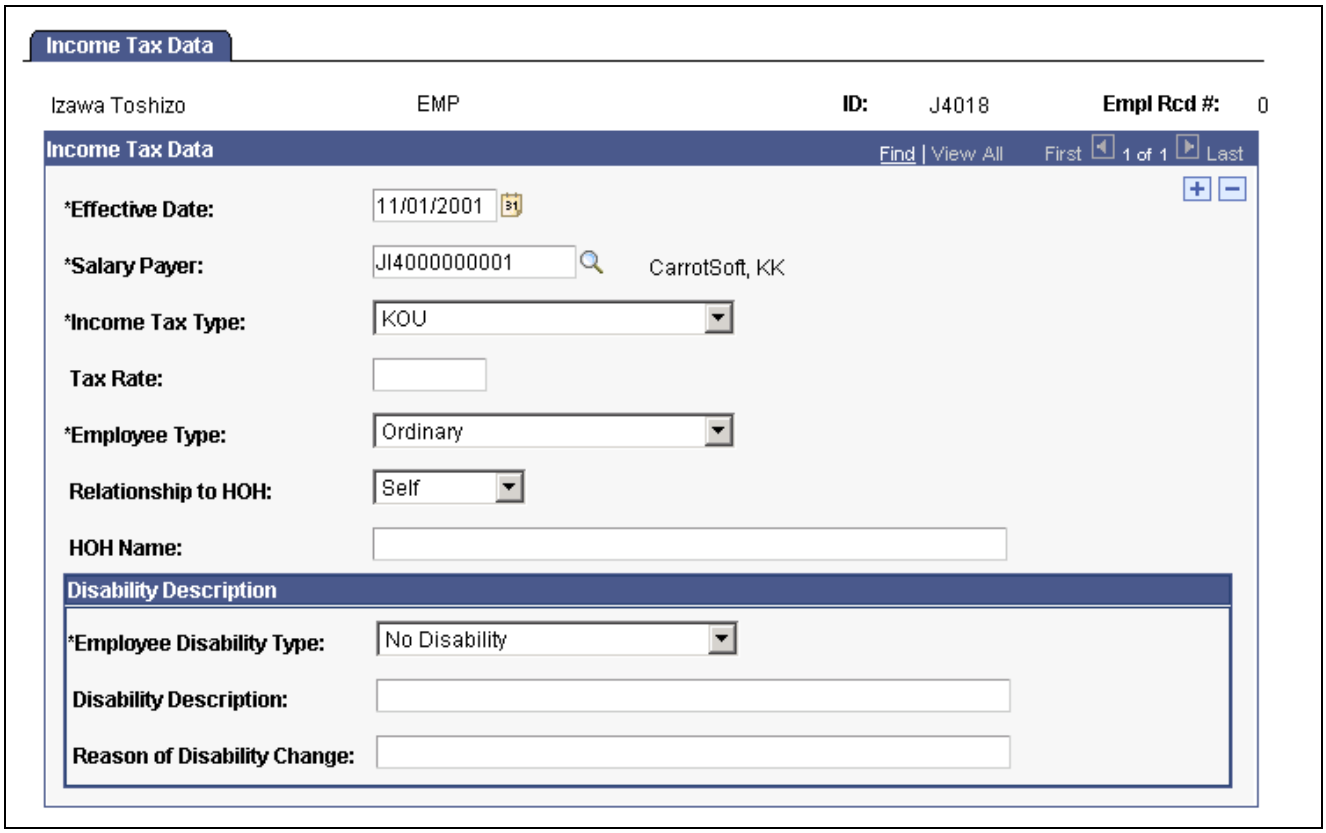
Chapter 4, "Setting Up Insurance, Taxes, and Payslips," page 21

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Entering Additional Data in Human Resources Records"

Entering Employee Income Tax Data

Access the Income Tax Data page.

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Income Tax Data page

Income Tax Type Select from the following values: *Designated Rate, KOU,* and *OTSU.*

For employees with multiple jobs, *KOU* can be selected only once across all employment records. Otherwise, the system generates an error message. As the system doesn't allow multiple employment records with tax type KOU at the same time, you have to update the current KOU record to a non-KOU value and then update the non-KOU record to KOU.

If the employee type is not KOU, the employee can't update this dependent data on the self-service pages.

Tax Rate Enter a value here only if you select *Designated Rate* for the income tax type. For example, enter *0.2* if the designated tax rate is 20 percent.

Relationship to HOH (relationship to head of household) Select the relationship of the employee to the head of the household. If the employee is the head of household, select *Self.*

HOH Name (head of household's name) If the employee is not the head of the household, enter the name of the person who is.

Disability Information

Enter or edit disability information that is provided by employees on the Dependent Deduction report.

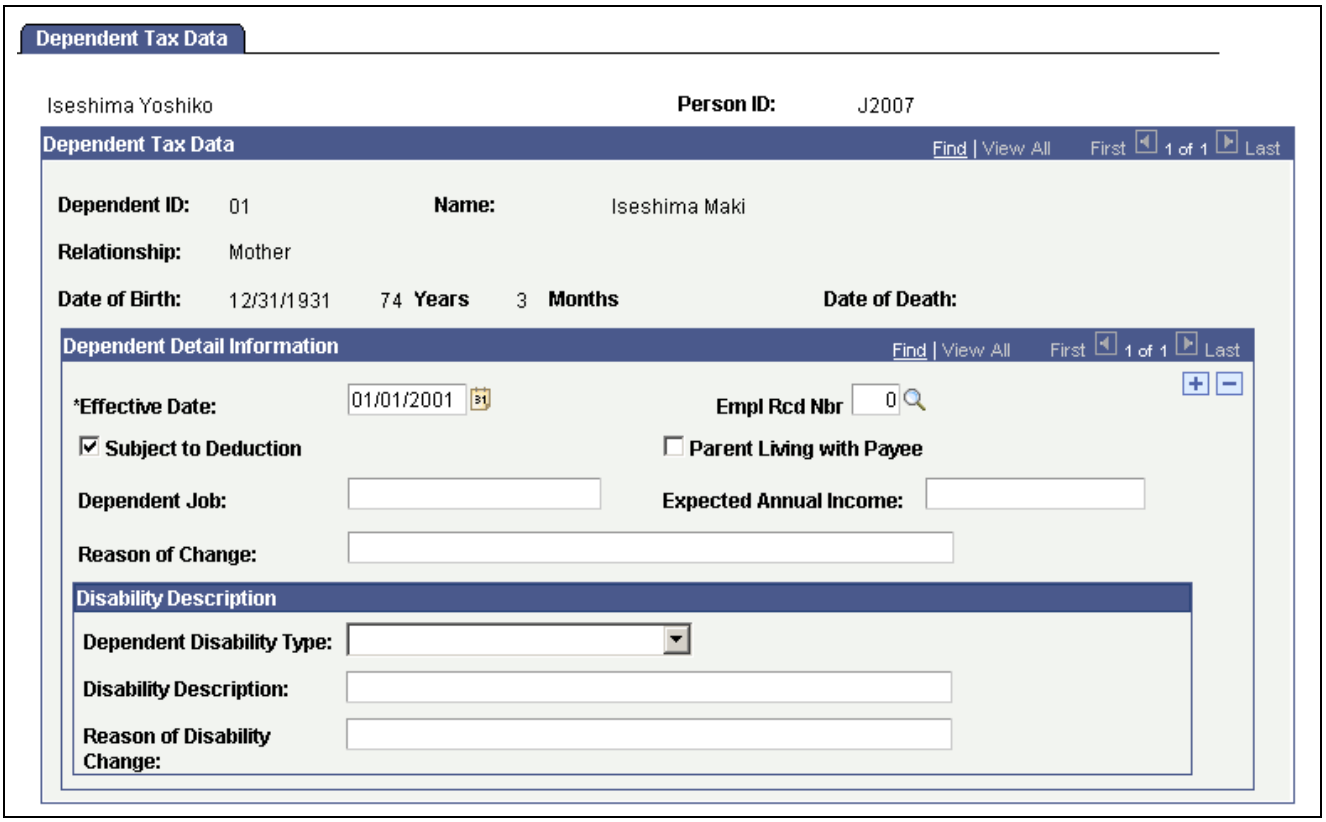
See Also

Chapter 16, "Preparing Year-End Adjustment," Entering Deduction Data for the Year-End Adjustment (YEA), page 158

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Entering Dependent Income Tax Data

Access the Dependent Tax Data page.



Dependent Tax Data page

The selections you make on this page determine the personal exemptions for income tax during year-end processing, as well as for withholding income tax. The application determines the exemptions based on the dependent's birth date and relationship to the payee. This table summarizes the system logic for determining applicable personal exemptions:

Information from Dependent Tax Table	Age as of Base Date	Applicable Personal Exemption
Relationship is Spouse and Subject to Deduction is selected.	Equal to or more than 70.	Elderly Spouse
Relationship is Spouse and Subject to Deduction is selected.	Less than 70.	Ordinary Spouse
Relationship is other than Spouse, Subject to Deduction is selected and Parent Living with Payee is selected.	Equal to or more than 70.	Elderly Parent Living with Payee
Relationship is other than Spouse, Subject to Deduction is selected and Parent Living with Payee is selected.	Less than 70.	Ordinary Dependent

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Information from Dependent Tax Table	Age as of Base Date	Applicable Personal Exemption
Relationship is other than Spouse, Subject to Deduction is selected, and Parent Living with Payee is not selected.	Equal to or more than 70.	Elderly Dependent
Relationship is other than Spouse and Subject to Deduction is selected.	Equal to or more than 16 and less than 23.	Specified Dependent
Relationship is other than Spouse and , Subject to Deduction is selected.	Equal to or more than 23, and less than 70.	Ordinary Dependent
Relationship is other than Spouse and Subject to Deduction is selected.	Less than 16.	Ordinary Dependent
Any combination other than those specified in this table.	Any age.	Not Applicable

Dependent Detail Information

You must link the dependent tax data with an employment record number. If the employee has multiple jobs, the employment record number that is linked to the tax type KOU on the Income Tax Data page defaults to the Empl Rcd Nbr field. If no employment record number is linked to tax type KOU, zero is defaulted.

Note. If the relationship of the dependent is changed to *ExSpouse* in HR, you should clear the Subject to Deduction check box on this page.

Disability Description

Enter or edit disability information that is provided by employees on the Dependent Deduction report.

Deleting Dependent Tax Data

If dependent tax data exists on this page, it will be orphaned if the dependent data is deleted from the Dependent Information page, unless service operation DEPBEN_SYNC is enabled.

See Also

Chapter 16, “Preparing Year-End Adjustment,” Entering Deduction Data for the Year-End Adjustment (YEA), page 158

Processing the Withholding Tax Register

This section provides an overview of the Withholding Tax Register and discusses how to run the report.

Understanding the Withholding Tax Register

A PeopleSoft Application Engine process loads the results of Global Payroll calculations into the Withholding Tax Register data table (GPJP_IT_WH_REG) and the Detail Withholding Tax Register table (GPJP_IT_WH_REG2).

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A SQR process selects data from the Withholding Tax Register records and from static Human Resources and Global Payroll records and prints the data.

Print a Withholding Tax Register report for an employment record, an employee, or for all employees for a specified salary payer. Run this report after year-end adjustment or at any time during the year.

Note. To include the year-end values on the Withholding Tax Register, you must run the Load YEA Table Application Engine process (GPJP_YEALOAD) before you run this report.

Page Used to Run the Withholding Tax Register Report

Page Name	Object Name	Navigation	Usage
Inc Tax Withholding Register	GPJP_RC_IT_WHRG	Global Payroll & Absence Mgmt, Taxes, Inc Tax Withhold Reg Rpt JPN, Inc Tax Withholding Register	Run the Withholding Tax Register Report (GPJPIT01), which prints payroll data in the following categories: employee identification data, salary data, bonus data, PTO data, former employment data, total amounts data, year-end adjustment data, and retirement allowance.

Viewing Delivered Income Tax Deductions

Global Payroll for Japan delivers the following deductions to process income tax:

Deductions	Description
IN TAX SAL	Income tax (salary)
IN TAX BON	Income tax (bonus)

The PeopleSoft system delivers a query that you can run to view the names of all delivered elements designed for Japan. Instructions for running the query are provided in the *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "Entering Additional Data in Human Resources Records"

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CHAPTER 15

Administering Zaikei Deductions

This chapter provides an overview of Zaikei savings plans and discusses how to:

- Set up Zaikei deductions.
- Assign Zaikei deductions to payees.

Understanding Zaikei Savings Plans

Zaikei savings accounts are government-sponsored plans for employees that promote asset formation and accumulation in the form of savings for housing and pensions. Employers deduct a fixed amount from employee earnings (salary and bonuses). Preferential tax treatment may apply to interest earned on Zaikei savings. Employer participation in Zaikei plans is optional, but most provide this benefit to their employees.

Zaikei Account Products and Restrictions

Companies establish contracts with financial institutions to administer Zaikei plans on their behalf. Financial institutions modify their existing products to comply with Zaikei restrictions. These restrictions require that:

- New accounts be created only by the company for which the employee works.
- Contribution be made only through deductions from salaries and bonuses.
- Employee withdrawals be made only through the company for which the employee works.
- The account can be closed only by the company for which the employee works.

Understanding Element Assignment by Payee

The deductions from salary and bonuses for Zaikei savings are set up using the Element Assignment By Payee component in Global Payroll. The steps to set up Zaikei deductions and assign them to employees include:

1. Create a new element category for Zaikei deductions.

   Note. You can use this element category for all non-legislative deductions, not solely for Zaikei deductions.

2. Define a deduction element for each Zaikei financial product that the company offers with the override level set to Payee.
3. Add the element as a member to accumulators for Zaikei deductions.
4. Assign the element to the payee.
5. Enter the effective date and the amount of the deduction for the payee.

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Examples Presented in this Chapter

The deduction elements that are used in the examples in this chapter are delivered sample data. Other elements that are used in the examples are delivered as customary or statutory elements. You should consider the example a template for setting up Zaikei elements for your specific organizational needs. You must set up a deduction element for each Zaikei savings plan that your organization offers to employees. For example, if your organization has contracts with financial institutions A and B, and financial institution A has three Zaikei products and B has four, you will need to set up seven Zaikei deduction elements.

Delivered Sample Data for Zaikei Deductions

This table list the elements that are delivered as sample data that you can use for reference in creating your own elements. In some cases, you can use a delivered element, without modification, in your Zaikei setup.

Element	Element Type	Description
ZK GENERAL	Deduction	General Zaikei deduction.
ZK PENSION	Deduction	Zaikei deduction for pension savings.
ZK HOUSING	Deduction	Zaikei deduction for housing savings.
DENL	Element Category	Non-legislative deduction element category (for Zaikei elements).
ZK GC RUN TYPE FLG	Generation Control	Run type flag check.
ZK FM RUN TYPE FLG	Formula	Zaikei Run Type check flag (checks the run type of the Process).
ZK AC SAVINGS	Zaikei Savings Accumulator	All Zaikei deduction elements must be members of this accumulator. This accumulator is a member of accumulator ER AC TTL DED SAL (total amount of salary deductions) and accumulator ER AC TTL DED BON so that Zaikei deductions are deducted from gross earnings.
ZK SE DED	Zaikei Deduction Section	Delivered and Customary Zaikei deduction elements must be included in this section. This section is included in these existing process lists: • JPRSAL • JPRADJSAL • JPRBON • JPRADJBON

Printing Zaikei Deductions on Payslips and Reports

The amount of Zaikei deductions appears on JSALSLIP and JBONSLIP payslip IDs, for salary and bonus earnings respectively. When the amount is zero, neither the label nor the amount prints on payslips.

A segment accumulator for Zaikei deductions appears on these generic reports:

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- JGR02 (Accumulator List [Sal])
- JGR04 (Accumulator List [Bonus])
- JGR05 (Wage Ledger)

Setting Up Zaikei Deductions

This section reviews how to set up an element category for Zaikei deductions and discusses how to:

- Establish category types.
- Establish common settings
- Enter the deduction name.
- Set up the calculation.
- Set up the accumulator.

Note. This section documents only the pages of the Deductions component that require modification or specific field entries to set up Zaikei deduction elements. The pages where no entries are required, or default settings are kept, are not documented. The examples are based on the ZK GENERAL deduction that is delivered as sample data.

Setting Up an Element Category for Zaikei Deductions

Set up an element category for Zaikei deductions and the common settings for the category before setting up the Zaikei deduction elements. Use the delivered element category *DENL* (non-legislative deduction) as a template for creating new element categories, or use this delivered data category for your Zaikei deduction elements.

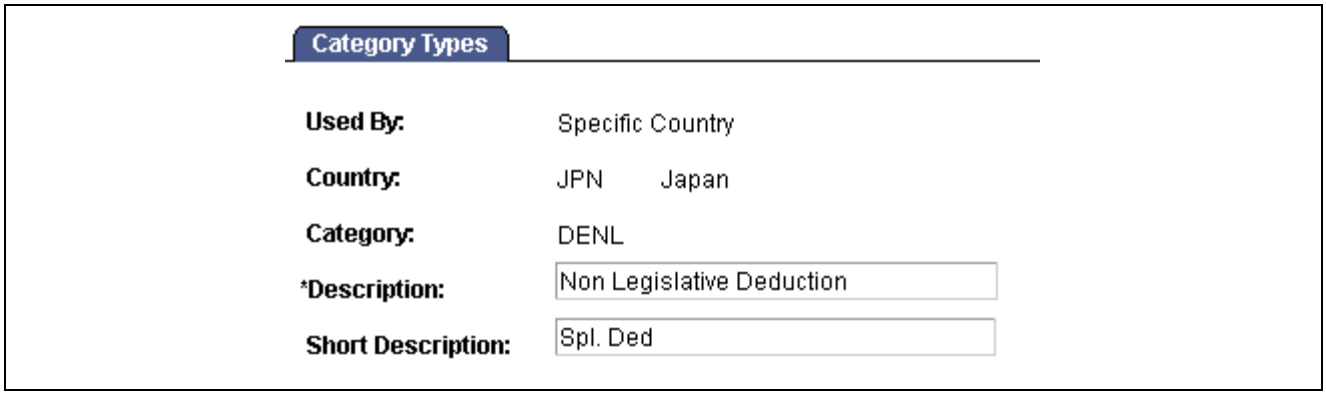
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Pages Used to Set Up Zaikei Deductions

Page Name	Object Name	Navigation	Usage
Category Types	GP_PIN_CATEGORY	Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Categories	Set up or use an existing category for Zaikei deduction elements.
Configuration by Category	GP_ED_SETUP_CAT	Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, System Settings, Configuration by Category, Common Settings	Define the message set, message number, and standard page and positive input overrides for the category.
Deduction Name	GP_PIN	Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Payroll Elements, Deductions, Deduction Name	Define a Zaikei deduction for each financial product offered to employees, and select Payee in the Override Levels group box.
Calculation	GP_ERN_DED_CALC	Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Payroll Elements, Deductions, Calculation	For Zaikei deductions, enter the effective date of the deduction, set the Calculation Rule option to *Amount,* and set the Amount Type option to *Payee Level.*
Accumulators	GP_ERN_DED_AC_ADDL	Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Elements, Payroll Elements, Deductions, Accumulators	Specify the accumulator for Zaikei deductions.

Establishing Category Types

Access the Category Types page.



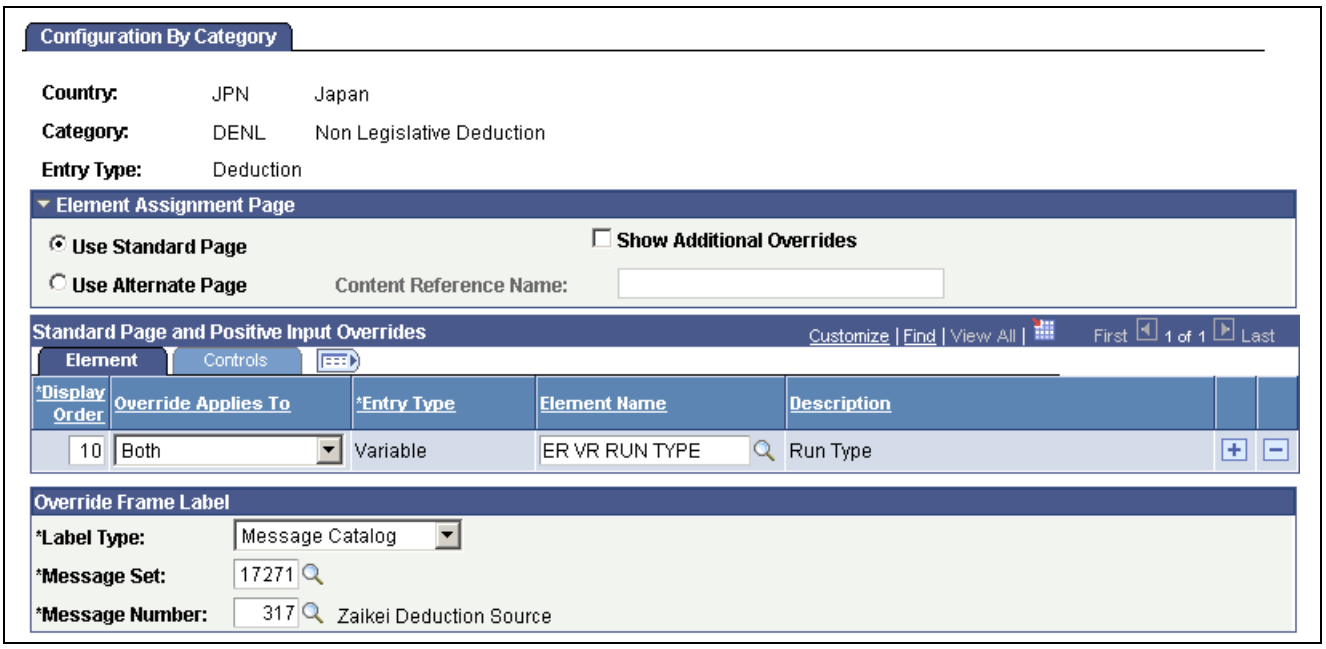
Category Types page

Define the category type for the Zaikei elements as a prerequisite to defining Zaikei deduction elements.

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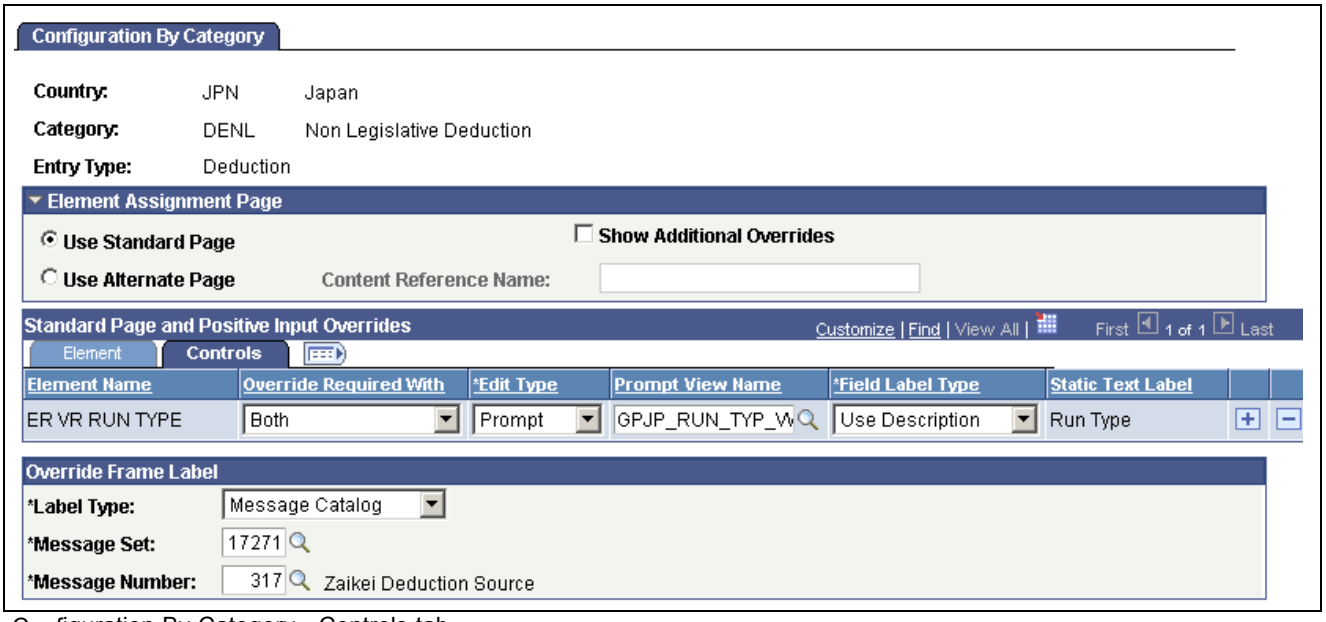
Establishing Common Settings

Access the Configuration by Category page.



Configuration By Category page - Element tab

The Variable ER VR RUN TYPE holds the name of the run type that the user selects. The generation control formula ZK GC RUN TYPE FLG compares this value with the RUN TYPE system element to determine whether to process the deduction.



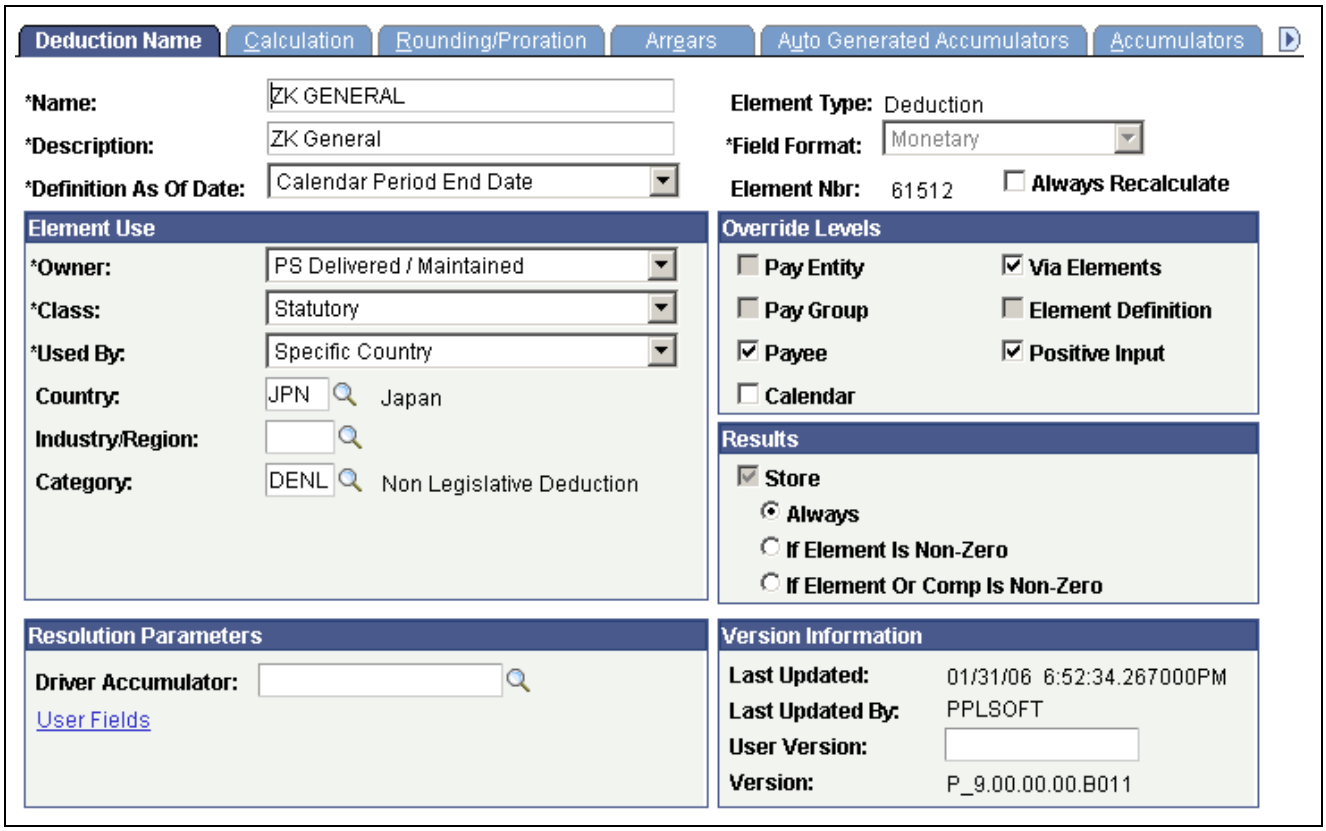
Configuration By Category - Controls tab

The GPJP_RUN_TYP_VW prompt view enables the user to select Japan-specific run types, either SAL (Salary) or BON (Bonus) based on the sample data.

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Entering the Deduction Name

Access the Deduction Name page.



Deduction Name page

Important settings for the Zaikei deduction on the Deduction Name page appear in the Override Levels group box. These override levels that are selected are:

- Payee
- Via Elements
- Positive Input

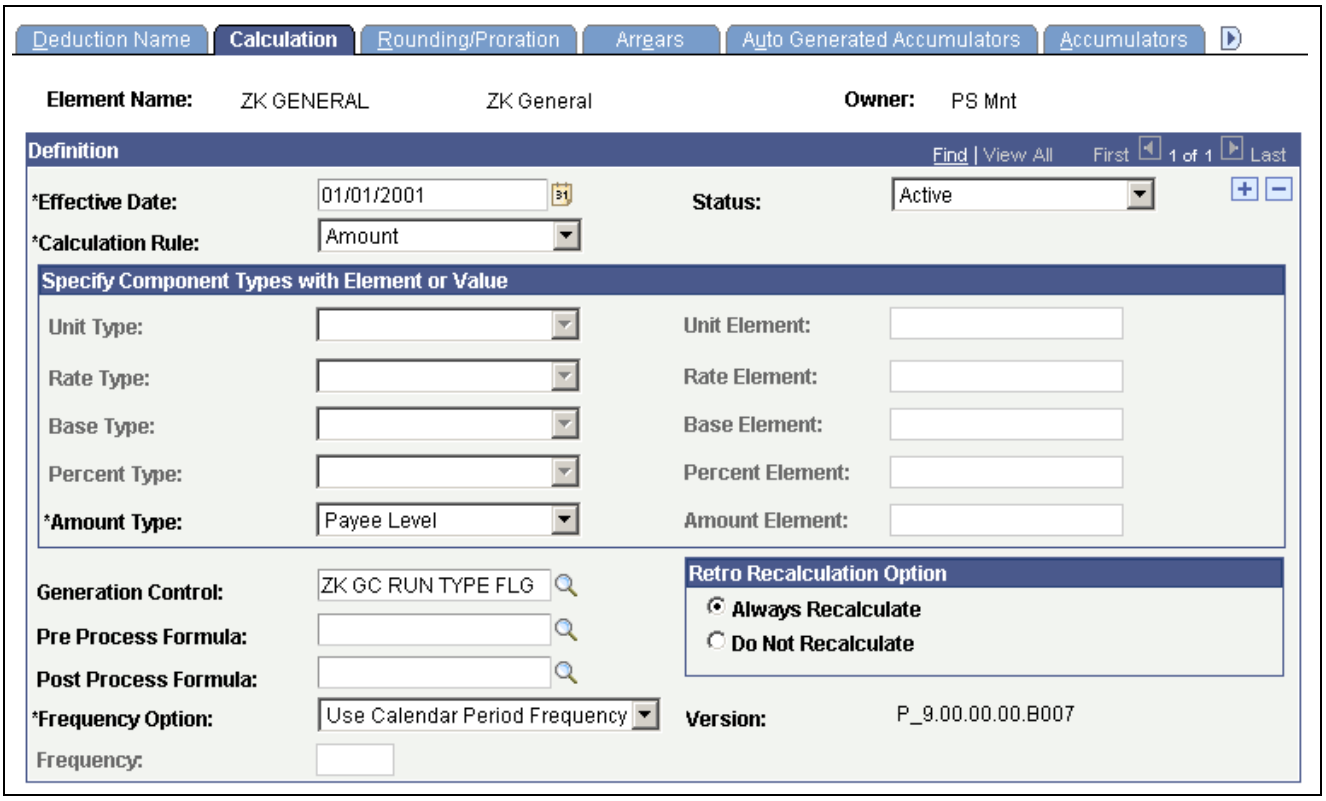
The results are always stored.

See PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, Defining Earning and Deduction Elements.

Setting up the Calculation

Access the Calculation page.

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Calculation page

The field entries on this page are the same for all Zaikei deduction elements that you create.

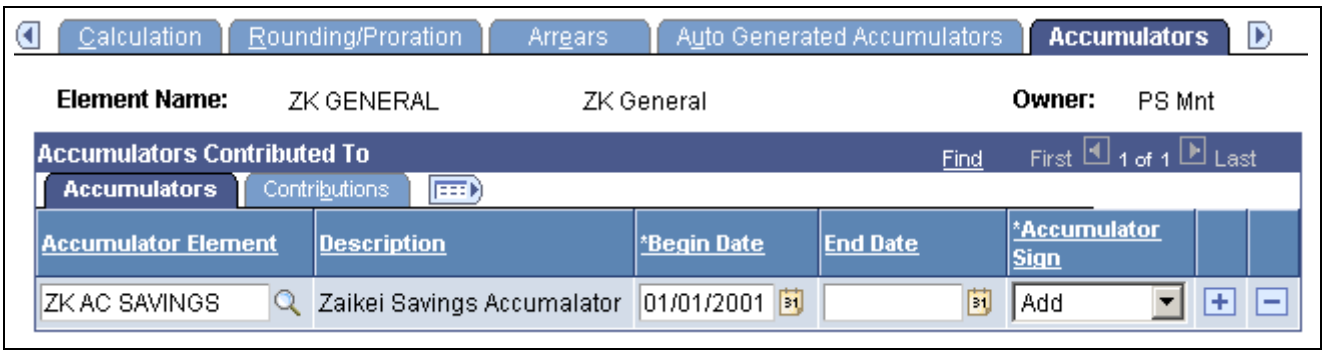
Calculation Rule Select the *Amount* option.

Amount Type Select the *Payee Level* option.

Generation Control The generation control formula *ZK GC RUN TYPE FLG* determines whether to process the deduction based on the Run Type system element.

Setting Up the Accumulator

Access the Accumulator page.



Accumulators page

The field entries on this page are the same for all Zaikei deduction elements that you create.

Accumulator Element Enter *ZK AC SAVINGS.*

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Accumulator Sign Select the *Add* option.

Note. On the Contributions tab, the Percent Option is *Numeric* and the Percent to Accumulate field entry is *100.000000.*

Assigning Zaikei Deductions by Payee

This section discusses how to:

- Assign elements by payee.
- Set up element details.

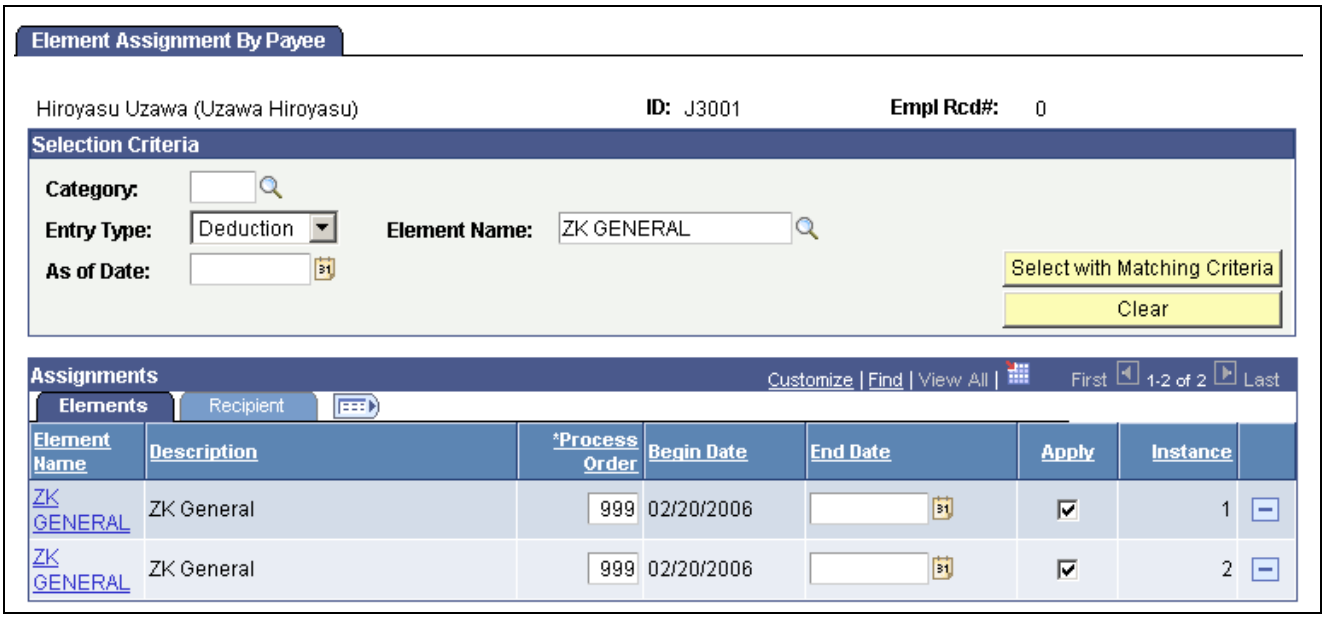
Page Used to Assign a Zaikei Deduction to a Payee

Page Name	Object Name	Navigation	Usage
Element Assignment By Payee	GP_ED_PYE	Global Payroll & Absence Mgmt, Payee Data, Assign Earnings and Deductions, Element Assignment By Payee	Assign Zaikei deductions to a payee
Element Detail	GP_ED_PYE_DTL_SEC	Global Payroll & Absence Mgmt, Payee Data, Assign Earnings and Deductions, Element Assignment By Payee. Click the Element Name link in the Assignments group box.	Set up calculation and run type information for the assigned deduction.

Assigning Elements by Payee

Access the Element Assignment By Payee page.

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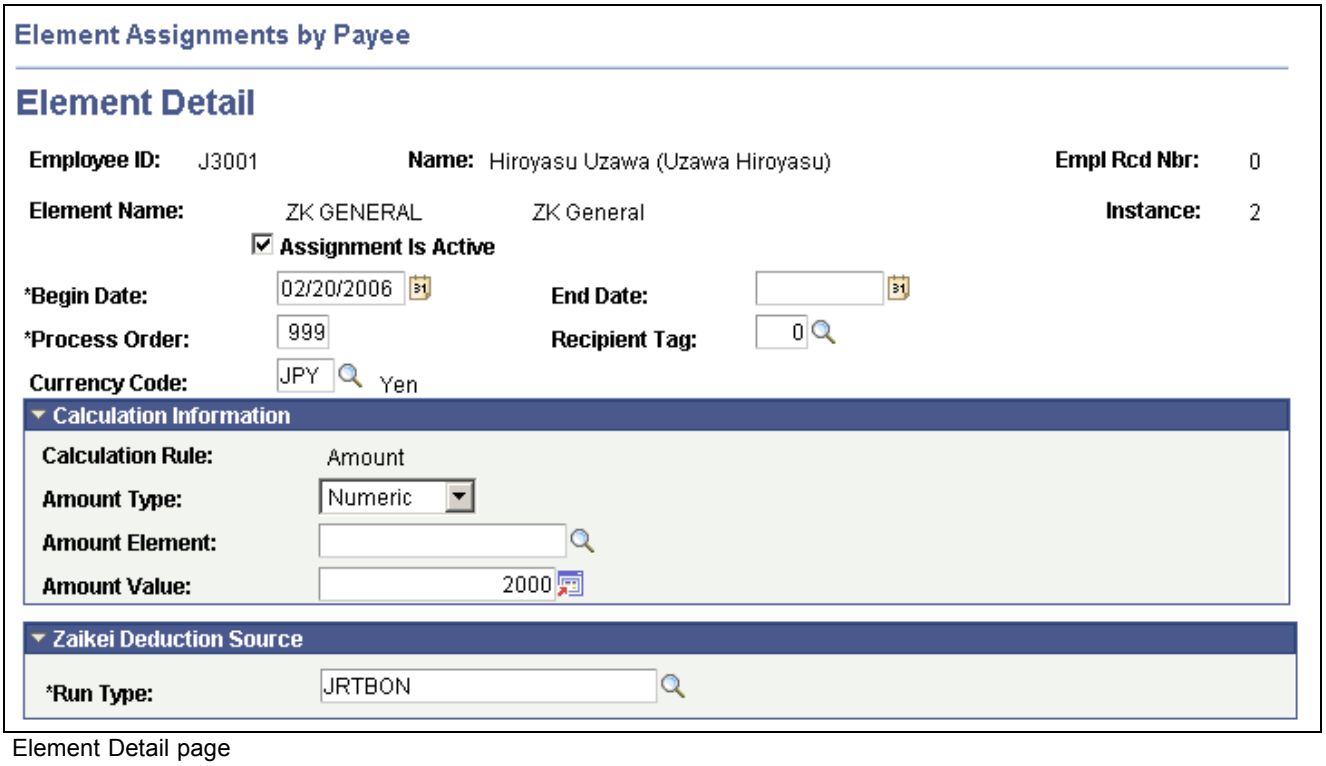


Element Assignment By Payee page

After you set up the Zaikei deductions, assign them to individual payees. Two instances of each Zaikei deduction are assigned, one for the salary run type, and one for the bonus run type.

Setting Up Element Details

Access the Element Detail page.



Element Detail page

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Begin Date

Note. The Zaikei deduction amount is defined as of the period end date rather than payment date. For example, if you are going to begin the Zaikei deduction from the monthly salary with a period begin date of January 1, a period end date of January 31, and a payment date of February 10, enter January 31 in the Begin Date field on this page.

See Also

PeopleSoft Enterprise Global Payroll PeopleBook, Setting Up Overrides

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CHAPTER 16

Preparing Year-End Adjustment

This chapter provides an overview of year-end adjustment (YEA) and discusses how to:

- Print the Dependent Deduction report and the Insurance and Spouse Special Deduction report.
- Enter deduction data for the Year-End Adjustment (YEA).
- Prepare for YEA reporting.
- Run Year-End reports.

Understanding YEA

Global Payroll for Japan provides rules that satisfy statutory and business requirements for calculating and reporting YEA on the final salary or bonus payment. In addition, it provides rules for calculating and reporting independent YEA when an event that affects a payee's annual income tax occurs after the YEA adjustment.

When you run the YEA process on the final salary or bonus, the system calculates for each payee the difference between income tax that is withheld and the income tax on actual earnings and settles this tax difference in the final payment of the year. For independent YEA processing, where the tax difference represents an underpayment of income tax, the system carries over the tax difference as a deduction to be taken in the first payment of the following object year. If the tax difference represents excess withholding of income tax, the excess amount is refunded to the payee at year end. You can carry over this amount to the next year.

This section discusses:

- Delivered YEA elements.
- Viewing delivered elements.
- Tax difference carryover for independent YEA.
- YEA reports.
- Self-service YEA data collection.
- YEA data collection through printed reports.

Delivered YEA Elements

Global Payroll for Japan delivers these elements for processing year-end adjustments:

- Deduction elements YE TAX DIF and YE TXDIF CY.

  YE TAX DIF represents the tax difference amount that the system calculates during YEA processing. YE TX DIF CY represents the tax amount difference that is carried over to the next year for employees who are subject to independent YEA processing.

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- Process lists, JPRADJSAL, JPRADJBON, and JPRADJIND.

  Use the applicable payroll process list to run the YEA process for salary or bonus, or for independent YEA adjustments.

Viewing Delivered Elements

You can run a delivered query to view the names of all delivered elements that are designed for Japan. Instructions for running the query are provided in the *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook.*

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Viewing Delivered Elements"

Tax Difference Carryover for Independent YEA

When the tax difference that is calculated for an independent YEA represents an underpayment of income tax, the system uses the deduction element, YE TXDIF CY, to carry over the difference to the next object year. When you run the regular payroll process for January (using process list JPRSAL), the system deducts the amount from the payee's earnings. If the tax difference is greater than the payee's earnings in January or cannot be deducted from the January salary, the tax difference is carried over to the next month, until the deduction is taken.

By default, refunds are not carried forward but are paid to employees in the last payment of the year. To carry over refunds, set the value of variable YE VR CYOVR FLG to 1 (one).

The system reports the tax difference that is carried over on the YEA payslips, the Withholding Tax Register report, and the Tax Difference Carried Over from the Previous Year report.

YEA Reports

After year-end adjustments are complete and you prepare your data tables, you can generate these reports to complete the YEA business process:

- Withholding Tax report (GPJPYE01).
- Wage Payment report (GPJPYE01).
- Legal Payment Summary report (GPJPYE02).
- Wage Payment Summary report (GPJPYE03).
- Tax Difference Carried Over from the Previous Year report (GPJPYE06).

Self-Service YEA Data Collection

Global Payroll for Japan supports both a paper exchange method and a self-service method for collecting YEA data from employees.

If your organization licenses PeopleSoft Enterprise ePay and PeopleSoft Enterprise eProfile, you can collect YEA data from employees through self-service pages. The process for collecting and reviewing self-service YEA data includes these steps:

1. The payroll administrator specifies the time period in which employees can update data through the self-service transaction.

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2. Employees access a main YEA Information page in ePay.

   From that page, they access other pages where they can review and update this YEA data:

   - Employee tax information, such as head of household and disability information.
   - Employee personal data information, such as name, address, and birth date. (Available only if your organization also licenses eProfile.)
   - Dependent tax information, such as relationship and disability types.
   - Life insurance and personal pension insurance information.
   - Nonlife insurance, social insurance, and small enterprise mutual aid insurance information.
   - Spouse special deduction information.
   - Housing loan special deduction information.

3. Payroll administrators review the data and accept it or notify the employee to revise it.
4. (Optional) The payroll administrator prints the Dependent Deduction report and Insurance and Spouse Special Deduction report for record-keeping purposes.

YEA Data Collection Through Printed Reports

Payroll administrators perform the following steps to collect YEA data using printed reports:

1. Print and distribute the following two forms on which employees manually enter their YEA data:
   - Dependent Deduction report.
   - Insurance and Spouse Special Deduction report.
2. Collect the completed forms from employees.

   Use these forms to enter data into Global Payroll for Japan income tax and YEA tables.

   Retain the completed forms for record-keeping purposes.

Printing the Dependent Deduction Report and Insurance and Spouse Special Deduction Reports

This section provides an overview of the Dependent Deduction report and Insurance and Spouse Special Deduction reports, lists common elements, and discusses how to:

- Run the Dependent Deduction report.
- Run the Insurance and Spouse Special Deduction report.

Understanding Dependent Deduction and Insurance and Spouse Deduction Reports

The data collection method that you use determines when you run these reports and what they contain.

Data Collection Through Printed Reports

Use these reports to collect the data that you later enter into the system manually:

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- Dependent Deduction report.

  This report prints the current employee and dependent information, which the employee can modify if a correction or update is needed.

- Insurance and Spouse Special Deduction report.

  This report prints the basic employee information only.

For record-keeping purposes, you can retain the reports that are submitted by employees.

Self-Service Data Collection

With self-service data collection, you can print the reports for record-keeping purposes after employees have updated their data. The reports gather data from the tables on which the self-service data is stored in the system.

Common Elements Used in This Section

Print Options Select the Print Bus (business) Unit and Location check box to print the business unit and location on the report. This information appears at the bottom of the report.

Sort Order Select the sort order in which you want the report to print. Options include *Business Unit, Location Code, Department,* and *Supervisor Level ID.*

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Pages Used to Print the Dependent Deduction and Insurance and Spouse Special Deduction Reports

Page Name	Object Name	Navigation	Usage
YEA Dependent Deduction (year-end adjustment dependent deduction)	GPJP_RC_YEA04	Global Payroll & Absence Mgmt, Year-End Processing, Report YEA Dependent Ded JPN, YEA Dependent Deduction	Run the Dependent Deduction report (GPJPYE04). For manual data collection, print the report and distribute it to employees for review and update. For self-service data collection, print the report for record-keeping purposes after employees have updated their data in the ePay and eProfile transactions.
YEA Insurance and Spouse (year-end adjustment insurance and spouse)	GPJP_RC_YEA05	Global Payroll & Absence Mgmt, Year-End Processing, Report YEA Ins and Spouse JPN, YEA Insurance and Spouse	Run the Insurance and Spouse Special Deduction report (GPJPYE05). For manual data collection, print the report and distribute it to employees for review and update. For self-service data collection, print the report for record-keeping purposes after employees have updated their data in the ePay transaction.
Payee List	GPJP_RC_YEA_SEC	Click the Payee List link on the YEA Dependent Deduction page or the YEA Insurance and Spouse page.	Select individual employees to report. Do not use this page in conjunction with other employee selection criteria.

Running the Dependent Deduction Report

Access the YEA Dependent Deduction page.

Object Year This field determines the date for which report data is retrieved. The Dependent Deduction report is based on information as of the last day of the object year. So if you enter 2004 in this field, the report is based on data that was in effect on December 31, 2004.

The exception to this rule is the payee's address, which is retrieved as of the first date of the object year. So if the object year is 2004, the as of date for the address is January 1, 2004.

Running the Insurance and Spouse Special Deduction Report

Access the YEA Insurance and Spouse page.

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Object Year If ePay is not installed, this field determines the date for which report data is retrieved. The Insurance and Spouse Special Deduction report is based on information as of the last day of the object year. So if you enter 2004 in this field, the report is based on data that was in effect on December 31, 2004.

If ePay is installed, the system uses the date that is entered in the As of Date field on the Year End Adjustment Self Service Setup page to retrieve data for the report.

YEA Status This group box appears only if ePay is installed. Select the appropriate status for the year-end adjustment: *Submitted, Approved,* or *Sent to Payroll.*

See Also

PeopleSoft Enterprise ePay 9.0 PeopleBook, "(JPN) Updating Year-End Adjustment Data," Setting Up the YEA Data Self-Service Transaction

Entering Deduction Data for the Year-End Adjustment (YEA)

This section provides overviews of deduction data entry for YEA and manual adjustments to YEA data for multiple jobs and discusses how to:

- Load self-service deduction data.
- Enter YEA deduction data and editing YEA type.
- Enter prior employment data.
- Enter employee tax deduction data that is collected by reports.
- Enter dependent tax deduction data that is collected by reports.

Understanding Deduction Data Entry for YEA

Before processing the YEA reports, you must enter deduction information for YEA into the GPJP_YEA_PYEADJ table and ensure that data in the GPJP_IT_PYE_TAX and GPJP_IT_DEP_TAX tables is up-to-date.

Much of this data is collected through either the self-service or the manual method of YEA data collection. The method of entering the data differs according to the collection method.

Note. Even if you use data that is collected through the self-service pages, you must still access the YEA Adj Data (year-end adjustment data) page if you need to edit the employee's YEA type. You must also access the Prior Employment page to enter prior employment data.

This table lists how the tables for each method of data collection are updated:

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Data and Payroll Table That Is Loaded	Self-Service Method	Manual Method
Employee tax deduction data on (GPJP_IT_PYE_TAX)	Automatically updated when the employee saves information that is entered on the Employee Tax Information self-service page.	Collected on the Dependent Deduction report and manually entered on the Income Tax Data page (GPJP_IT_PYE_TAX).
Dependent tax deduction data on (GPJP_IT_DEP_TAX)	Automatically updated when the employee saves information that is entered on the Edit Dependent Tax Information self-service page.	Collected on the Dependent Deduction report and manually entered on the Dependent Tax Data page (GPJP_IT_DEP_TAX).
Insurance, spouse, and housing loan special deduction data on (GPJP_YEA_PYEADJ)	Run the Load YEA Self Service Data process (GPJP_YEASSLD), which loads data that is entered by employees on the Employee Personal Information and insurances and deductions self-service pages.	Collected on the Insurance and Spouse Special Deduction report and manually entered on the YEA Adj Data page (GPJP_YEA_PYEADJ).

Understanding Manual Adjustments to YEA Data for Multiple Jobs

When an employee has multiple jobs, YEA report data is loaded for each employment record independently. The data is always loaded using the tax type that was in effect as of the payment date for the year-end adjustment process. When the tax type changes during the year, you may need to make a manual adjustment on the Prior Employment page so that the system bases the year-end adjustment and Withholding Tax report on the proper salary amount.

Example: Employee is Paid from One Employment Record Each Month

As an example, assume that an employee's salaries were paid from Empl Rec Nbr 0 (employment record number 0) for every month except May through August when salaries were paid from Empl Rcd Nbr 1 as shown in this table:

Empl Rcd #	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
0	Kou	Kou	Kou	Kou	No	No	No	No	Kou	Kou	Kou	Kou
1	No	No	No	No	Kou	Kou	Kou	Kou	No	No	No	No

Assume that the payment date is December 30. Because the employee's tax type as of this date is Kou, as long as the employee meets other conditions that are required for the year-end adjustment, the adjustment is processed on Empl Rec Nbr 0. The year-end adjustment is based on the salaries that were paid for Empl Rec Nbr 0 from January to April and from September to December, and the Withholding Tax report is printed.

To include salaries that were paid from May to August for Empl Rcd Nbr 1 in the year-end adjustment purposes, you must access the Prior Employment page for Empl Rcd Nbr 0 and enter the salaries and deductions for Empl Rcd Nbr 1 before you run the year-end adjustment process for Empl Rec Nbr 0.

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Pages Used to Enter Deduction Data for YEA

Page Name	Object Name	Navigation	Usage
Load YEA Self Service (load year-end adjustment self service)	GPJP_RC_YEALOAD_SS	Global Payroll & Absence Mgmt, Year-End Processing, Load YEA Self Service Data JPN, Load YEA Self Service	Load self-service deduction data. Payroll administrators run the Load YEA Self Service process (GPJP_YEASSLD) to load updated self-service employee personal data, life and nonlife insurance, and spouse and housing loan deduction information into the YEA Adj Data table and the corresponding page (GPJP_YEA_PYEADJ).
Payee List	GPJP_RC_YEA_SEC	Click the Payee List link on the Load YEA Self Service page.	Select individual employees to load their data.
YEA Adj Data (year-end adjustment data)	GPJP_YEA_PYEADJ	Global Payroll & Absence Mgmt, Payee Data, Taxes, Maintain Year-End Adj Data JPN, YEA Adj Data	Enter deduction data (housing acquisition deduction, insurance, and spouse deduction) and edit YEA type. Indicate whether employees are subject to adjustment.
Prior Employment	GPJP_YEA_PYEPRI	Global Payroll & Absence Mgmt, Payee Data, Taxes, Maintain Year-End Adj Data JPN, Prior Employment	Enter prior employment data, such as income, tax, social insurance premium, and the prior employer's name and address.
Income Tax Data	GPJP_IT_PYE_TAX	Global Payroll & Absence Mgmt, Payee Data, Taxes, Maintain Income Tax Data JPN, Income Tax Data	Enter the salary payer number and employee tax deduction information that is collected by report, such as employee type and disability type.
Dependent Tax Data	GPJP_IT_DEP_TAX	Global Payroll & Absence Mgmt, Payee Data, Taxes, Maintain Dep Tax Data JPN, Dependent Tax Data	Enter spouse or dependent deduction information that is collected by the report, such as disability type.

Loading Self-Service Deduction Data

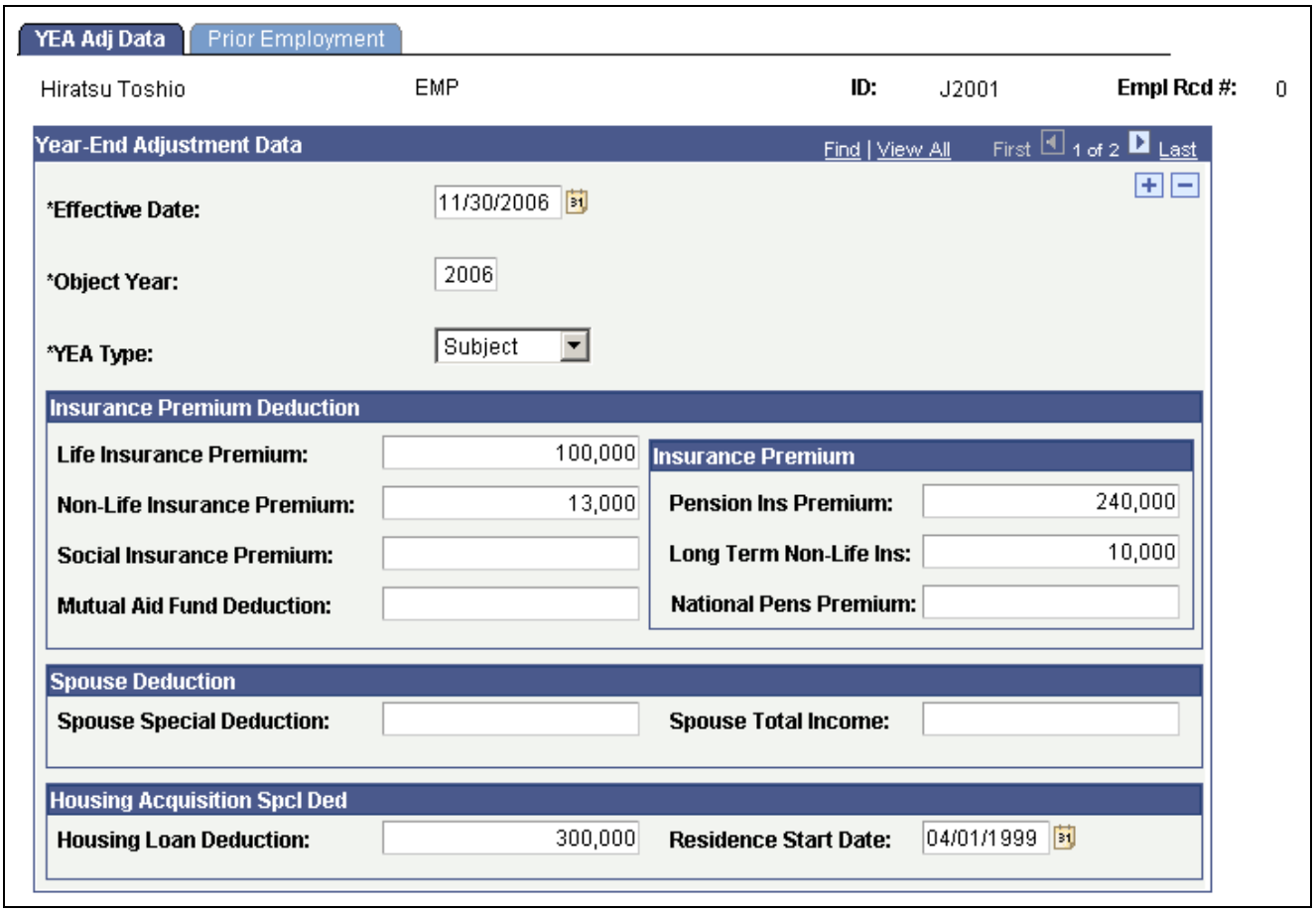
Access the Load YEA Self Service page.

See *PeopleSoft Enterprise ePay 9.0 PeopleBook*, "(JPN) Updating Year-End Adjustment Data," Loading YEA Self-Service Deduction Data.

Entering YEA Deduction Data and Editing YEA Type

Access the YEA Adj Data page.

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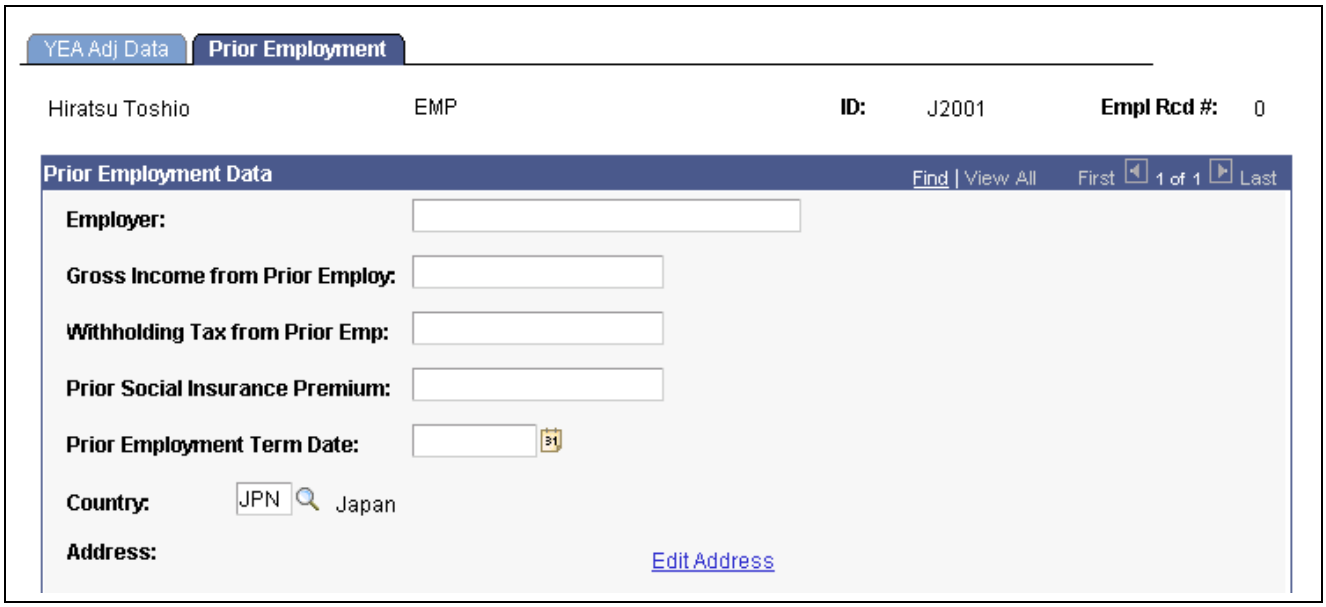
YEA Adj Data page

YEA Type (year end adjustment type) Select a value to indicate whether the employee is subject to income tax adjustment. The default is *Subject.* Select *Not Subject* to exclude the employee from the YEA process.

Entering Prior Employment Data

Access the Prior Employment page.

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Prior Employment page

Use this page to enter earning and deduction data from previous employers.

Entering Employee Tax Deduction Data That Is Collected by Report

Access the Income Tax Data page.

See Also

Chapter 14, “Withholding Income Tax,” Preparing for Income Tax Withholding, page 136

Entering Dependent Tax Deduction Data That Is Collected by Reports

Access the Dependent Tax Data page.

See Also

Chapter 14, “Withholding Income Tax,” Preparing for Income Tax Withholding, page 136

Preparing for YEA Reporting

This section provides an overview of YEA report data preparation and discusses how to:

- Update municipality codes and recipient numbers.
- Load YEA report data.
- View and update the YEA data table.

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Understanding YEA Report Data Preparation

The Load YEA Table Application Engine process (GPJP_YEALOAD) loads an intermediate table that contains most of the data that is necessary for these reports: withholding tax, wage payment, legal payment summary, and withholding tax register.

Regardless of whether you use the self-service or manual method of collecting data, follow this sequence when preparing to report YEA data:

1. Update employee addresses if necessary.

   If you collect YEA data through self-service transaction, you accomplish this step using the Employee Personal Information page and the Load YEA Self-Service Data process (GPJP_YEASSLD).
2. Run the Pre-Load Inhabitant Tax process (GPJP_IHMUN1) to preload municipality codes to the Inhabitant Tax table.
3. Update employee recipient numbers, if necessary, on the Inhabitant Tax Data page.
4. Run the Load YEA Report Data process (GPJP_YEALOAD).
5. Update the Submit to Tax Agent indicator and edit the summary, if necessary, on the YEA Report Data page.

Pages Used to Prepare for YEA Reporting

Page Name	Object Name	Navigation	Usage
Pre-load Inhabitant Tax	GPJP_RC_IH_MUN1	Global Payroll & Absence Mgmt, Taxes, Pre-Load Inhabitant Tax JPN, Pre-load Inhabitant Tax	Update the municipality codes and recipient numbers by running the Pre-Load Inhabitant Tax process (GPJP_IHMUN1), which loads the employee, municipality, and recipient numbers for the object year into the Inhabitant Tax table.
Inhabitant Tax Data	GPJP_IH_PYE_TAX	Global Payroll & Absence Mgmt, Payee Data, Taxes, Maintain Inhab Tax Data JPN, Inhabitant Tax Data	View and correct recipient numbers after running the Pre-Load Inhabitant Tax process.
Load YEA Report Data (load year-end adjustment report data)	GPJP_RC_YEALOAD	Global Payroll & Absence Mgmt, Year-End Processing, Load YEA Report Data JPN, Load YEA Report Data	Load the YEA report data.
YEA Report Data (year-end adjustment report data)	GPJP_YEA_TABLE	Global Payroll & Absence Mgmt, Year-End Processing, Rvw/Update YEA Report Data JPN, YEA Report Data	View and update the YEA Data table. View results of the YEA Data Load process and update the Submit to Tax Office indicator and theSummary field.

Updating Municipality Codes and Recipient Numbers

Access the Pre-load Inhabitant Tax page.

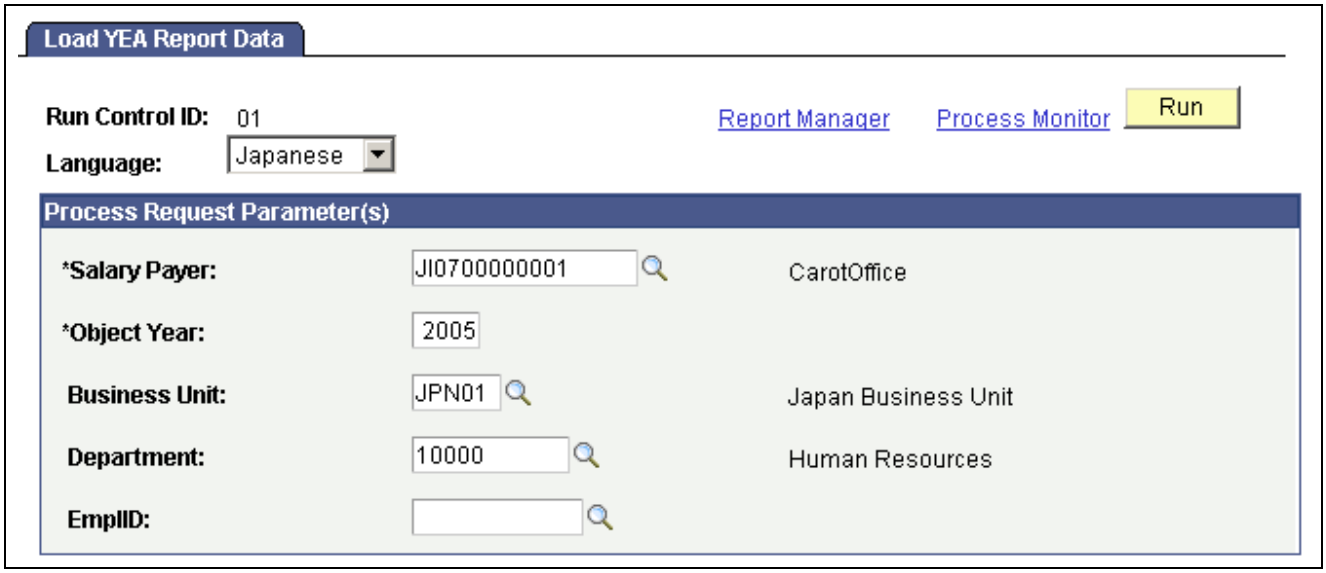
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Note. You must update and audit employee addresses and the postal code table before preloading data.

See Chapter 13, "Managing Inhabitant Tax," Setting Up the Inhabitant Tax Table, page 122.

Loading YEA Report Data

Access the Load YEA Report Data page.



Load YEA Report Data page

EmplID (employee ID) If you select an employee ID, the process updates the row of data for the selected employee only.

Note. To load YEA data for terminated employees, access the process through the Termination Processing menu path.

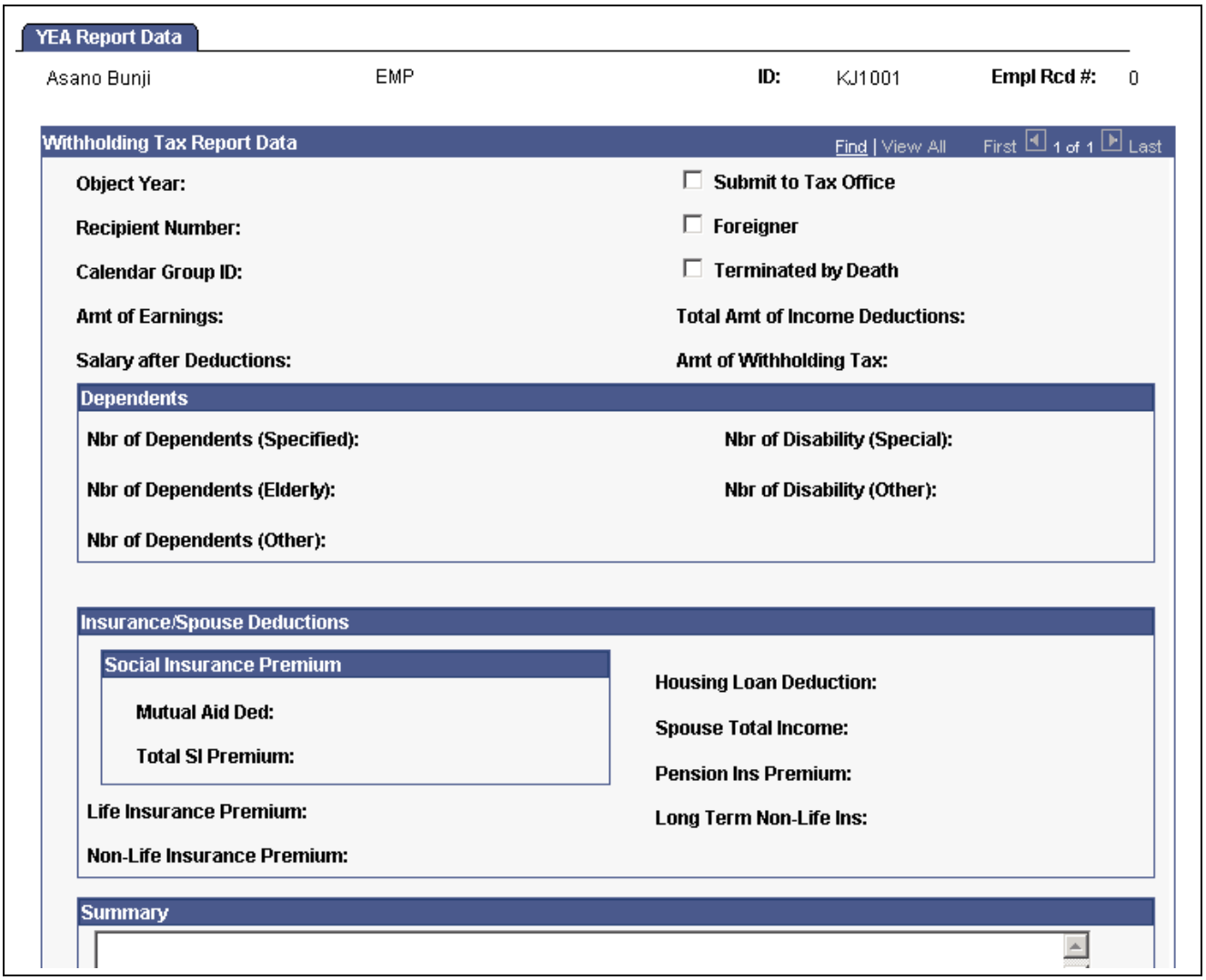
See Also

Chapter 7, "Processing Terminations," page 47

Viewing and Updating the YEA Report Data Table

Access the YEA Report Data page.

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YEA Report Data page

Submit to Tax Office The system selects this check box if the KOU-type employee's gross income is over 5 million yen or the OTSU-type employee's gross income is over 500,000 yen (formula YE FM SUBMIT). The system does not verify whether the employee is an officer, retired, a disaster victim, or any of the other criteria for determining whether to submit the Withholding Tax report to the tax office.

Summary The system enters deductible spouse and dependent identification, prior employment data, and the beginning date of residence (for employees who receive the housing acquisition special deduction). You can edit this data.

Because of length limitations, the entire summary might not appear on the printed reports.

Running Year-End Reports

This section discusses how to:

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- Run the Withholding Tax report.
- Run the Wage Payment report.
- Run the Legal Payment Summary report.

Note. Before running these reports, run the Load YEA Report Data process.

See Also

Chapter 7, "Processing Terminations," page 47

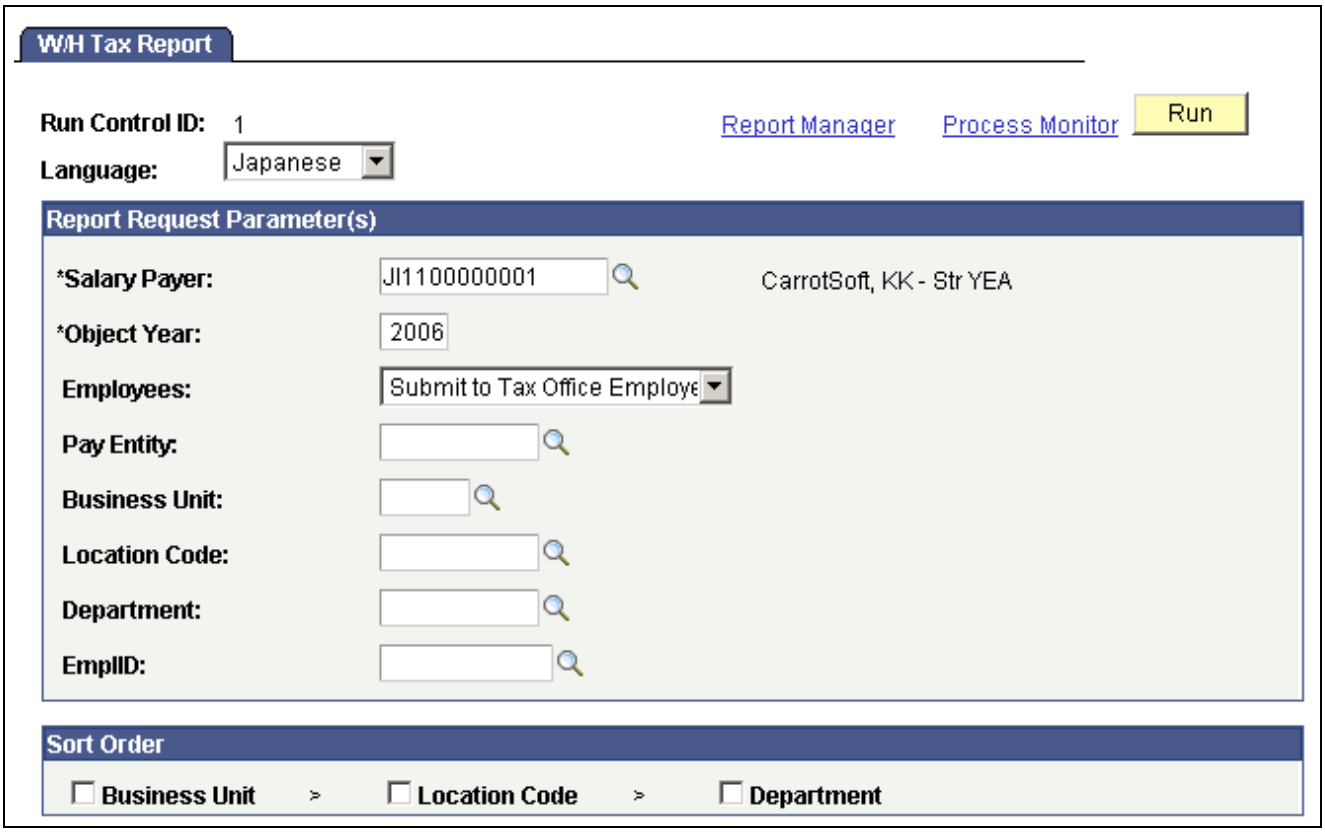
Pages Used to Run Year-End Reports

Page Name	Object Name	Navigation	Usage
W/H Tax Report (withholding tax report)	GPJP_RC_YEAWHRPT	Global Payroll & Absence Mgmt, Year-End Processing, Withholding Tax Report JPN, W/H Tax Report	Run the Withholding Tax report (GPJPYE01).
Wage Payment Rpt (wage payment report)	GPJP_RC_YEAWGRPT	Global Payroll & Absence Mgmt, Year-End Processing, Wage Payment Rpt JPN, Wage Payment Rpt	Run the Wage Payment report (GPJPYE01).
Legal Payment Rpt (legal payment report)	GPJP_RC_YEA	Global Payroll & Absence Mgmt, Year-End Processing, Legal Payment Summary Rpt JPN, Legal Payment Rpt	Run the Legal Payment Summary report (GPJPYE02).
Wage Pmt Summary (wage payment summary)	GPJP_RC_YEA	Global Payroll & Absence Mgmt, Year-End Processing, Wage Payment Summary Rpt JPN, Wage Pmt Summary	Run the Wage Payment Summary report (GPJPYE03).
Tax Difference Carry Over JPN	GPJP_RC_IT_TXDIF	Global Payroll and Absence Mgmt, Year-End Processing, Tax Difference Carry Over JPN	Run the Tax Difference Carried Over from the Previous Year report (GPJPYE06).

Running the Withholding Tax Report

Access the W/H Tax Report page.

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W/H Tax Report page

Employees

All Employees: Select to deliver the report to all employees after YEA has been processed.

*Submit to Tax Office Employees:*Select if you deliver the report to the tax office. The process will select only the employees whose Submit to Tax Office check box on YEA Report Data page is selected.

Note. To run the report for terminated employees, use the page from the Termination Processing menu.

Running the Wage Payment Report

Access the Wage Payment Rpt page.

Deliver this report to municipalities after YEA has been processed. Municipal Code and Recipient Number are optional parameters. Use these to restrict the output.

Running the Legal Payment Summary Report

Access the Legal Payment Rpt page.

This report displays amounts from the withholding tax reports for salary and bonus, as well as amounts from the retirement allowance withholding tax reports.

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CHAPTER 17

Working with Banking

This chapter provides an overview of the banking process and discusses how to:

- Set up banking.
- Set up alternate source banks.
- Generate banking electronic funds transfer (EFT) files and report.

Understanding the Banking Process

The following is a brief summary of the direct deposit banking process that is used for net payments to employees in Japan. Subsequent sections provide more details about these steps:

1. Set up bank accounts and schedule disbursements.
2. Run payroll.
3. Run the Banking process.
4. Run the Japan EFT process, which automatically generates the EFT file and Structured Query Report (SQR).

Terms and Definitions

The following terms are used in discussing the banking process:

Source bank	The bank that pays out the funds.
Transfer bank	The bank that receives the funds.

For direct deposit, the source bank is the company's bank and the transfer bank is the employee's bank.

Delivered Elements

The PeopleSoft system delivers a query that you can run to view the names of all delivered elements designed for Japan. Instructions for running the query are provided in the *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Viewing Delivered Elements," Understanding How to View Delivered Elements

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Setting Up Banking

Setting up banking involves entering three categories of information on up to 11 pages. The setup involves:

- Identifying banks, branches, and accounts for your company and payees.
- Identifying source banks and defining the level of funding.
- Identifying transfer banks and scheduling disbursements.

  Employees can specify percentage or amount disbursements to any number of bank accounts for each payment type (salary or bonus).

Banking setup steps are documented fully in the "Understanding Banking" chapter of the core *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook.* However, there are some details about following these steps that are important for banking in Japan.

Banking Setup Details

The following table lists the details for using the banking setup pages to set up banking in Japan:

Page Name	Element	Instructions
Bank Table	AC Bank Name (alternate character bank name).	Enter the bank name in single-byte Katakana format.
Bank Branch Table	Branch Information group box.	Specify a branch for every source bank and transfer bank that you set up. The EFT process halts with an error message when it encounters a net payment that does not have a branch associated with it.
Bank Branch Table	AC Branch Name (alternate character branch name).	Enter the branch name in single-byte Katakana format.
Source Bank Accounts	AC Account Name (alternate character account name).	Enter the bank account name in single-byte Katakana format.
Source Bank Accounts	Other Required Information.	Click this link to access the Japan Bank Additional Data page, where you must enter the company code and account type. If you leave the Account Type field blank, the EFT process supplies the *Regular* value.
Bank Account Information	AC Account Name (alternate character account name).	The default value is the alternate character name from the AC Name field on the Personal Data page.

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Note. All alternate character (AC) fields appear only if you enabled AC functionality on the Organization Defaults by Permission List page.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Defining Banking Instructions"

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Working with Languages"

Setting Up Alternate Source Banks

This section provides an overview of alternate source banks and discusses how to define alternate source banks.

Understanding Alternate Source Banks

If needed, you must define multiple pay entity source banks and multiple organizational unit source banks before running the banking process. Doing so establishes the appropriate source bank for each payee based on the recipient bank account.

While running the Global Payroll for Japan banking process, the system tries to match the payee's bank with the source bank in the following order:

1. The organization's default source bank.
2. The organization link's alternate source banks.
3. The pay entity's default source bank.
4. The pay entity's alternate source banks.

When a matching bank is found, the system uses this value for the remainder of the banking process.

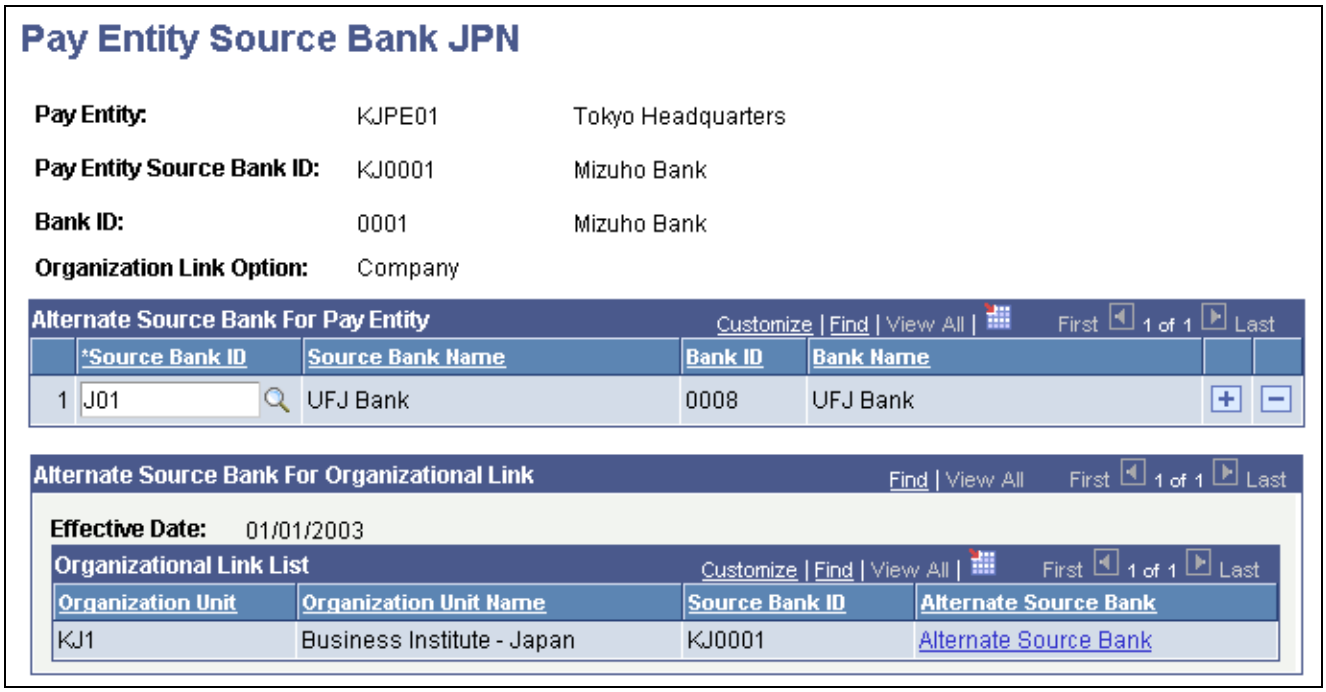
Pages Used to Set Up Alternate Source Banks

Page Name	Object Name	Navigation	Usage
Pay Entity Source Bank JPN	GPJP_PE_ALT_SBANK	Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Framework, Organizational, Pay Entity Source Bank JPN, Pay Entity Source Bank JPN	Define alternate source banks for pay entities and organizations.
Alternate Source Bank	GPJP_ALT_SBANK_SEC	Click the Alternate Source Bank link on the Pay Entity Source Bank JPN page.	Define the alternate source banks for an organization link.

Defining Alternate Source Banks

Access the Pay Entity Source Bank JPN page.

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Pay Entity Source Bank JPN page

Enter one or multiple source banks for the pay entity level or the organizational link or both. The Global Payroll for Japan banking process uses these values to override the source bank that is used for each payment row on the payment processing results table (GP_PAYMENT).

Click the Alternate Source Bank link to further define the source bank associated with the organizational link.

Generating Banking EFT Files and Report

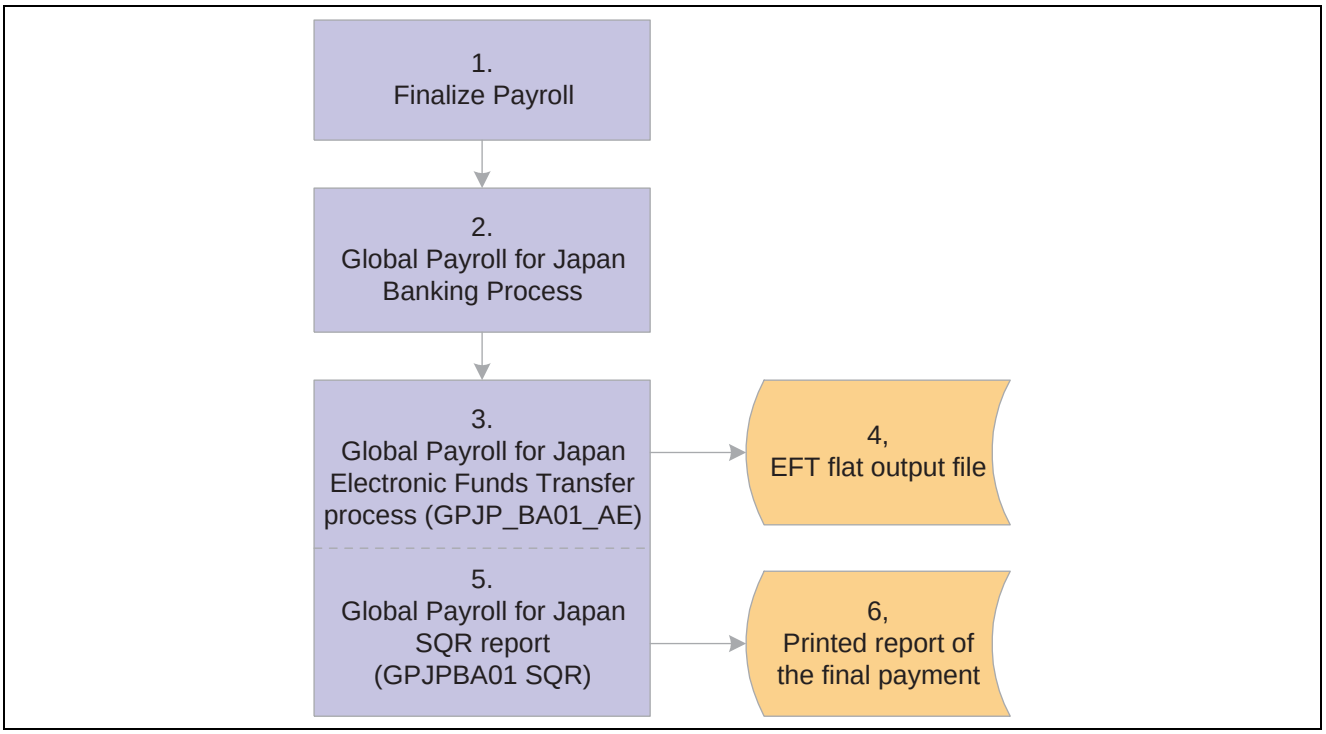
This section provides overviews of the EFT process flow and processing steps, lists a prerequisite, and discusses how to:

- Run the banking process.
- Create payment EFT.

Understanding the EFT Process Flow

This diagram illustrates the payroll EFT process flow for Japan:

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Payroll EFT process flow for Japan

Understanding the Processing Steps

The steps in this section correspond to the numbers in the preceding diagram:

1. Process payroll in the Global Payroll core application.
2. Run the Global Payroll for Japan banking process.

   This process populates the GP_PAYMENT output record.

   Note. Select the Finalize check box on the Banking Run Control page when you run the Banking process. If you do not, there won't be any data available for the next step.

   ---

3. Run the Global Payroll for Japan EFT process (GPJP_BA01_AE).

   This process selects all rows in GP_PAYMENT that have a status of *Finalized* for the specified calendar group ID, run type name, and source bank ID.

   The process populates the following records, which form the header, transaction, and trailer of both the EFT file and the printed report:

   - GPJP_BA_HEADER: The data in this record comes from the run control parameters that you enter on the EFT page.

     It identifies the company and the source bank account information.

   - GPJP_BA_TRANS: The data in this record comes from GP_PAYMENT and from the source and transfer bank data that you set up previously.

     It details the employee information, the transfer bank account information, and the amount of the transfer.

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- GPJP_BA_TRAILER: This record stores totals, such as the number of records in the TRANS record and the total amount of money being transferred.

  The process changes the status of rows in GP_PAYMENT from *Finalized* to *Transferred.*

4. The EFT process consolidates the data from the three records into one EFT file that you send to the source bank.

   It uses the file name and character set from the File Handle Table page.

5. The EFT process launches the SQR program (GPJPBA01 SQR).

6. The SQR program prints the Banking report in the standard character set by using data from the same three records as the EFT file.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Defining Banking Instructions," Understanding Banking

Prerequisite

You must set up file handles on the File Handle Table page before you can run the EFT process. The file handle looks up the file name and character set (single-byte Katakana) that is used to generate the file.

See Also

Chapter 3, "Defining Country Data," Setting Up File Handles, page 20

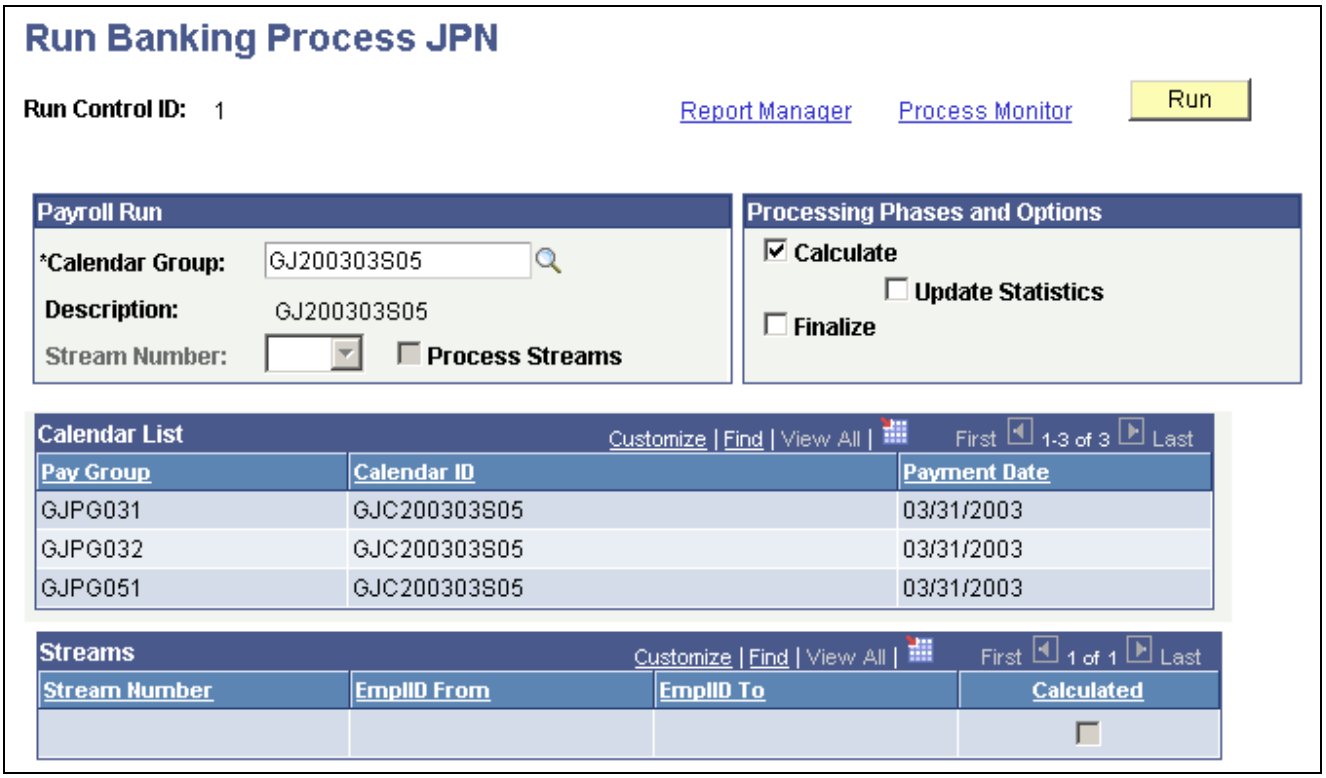
Pages Used to Run the Banking and EFT Processes and Print the Report

Page Name	Object Name	Navigation	Usage
Run Banking Process JPN	GPJP_RC_BA02	Global Payroll & Absence Mgmt, Payment Processing, Run Banking Process JPN, Run Banking Process JPN	Run a process to create a payment file that contains banking details.
File Handle Table	GPJP_FILE_HANDL	Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Reports, File Handles JPN, File Handle Table	Assign a handle to each file that you want to export.
Create Payment EFT (create payment electronic funds transfer)	GPJP_RC_BA01	Global Payroll & Absence Mgmt, Payment Processing, Create EFT Payment File JPN, Create Payment EFT	Create payment EFT. Run the EFT process, which prepares the EFT flat file that you transmit to the appropriate bank and launches the SQR program that prints the Banking report (GPJPBA01).

Running the Banking Process

Access the Run Banking Process JPN page.

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Run Banking Process JPN page

Calendar Group Select a calendar group for which to run the process. The system processes any items (segments) that are approved or finalized by the payroll process.

Stream Number If the Process Streams check box is selected, and you select *Calculate* in the Processing Options group box, you must select the stream number to process. Each stream number represents a predefined range of payees.

Process Streams The Process Streams check box is selected automatically if you selected the stream processing option when defining the calendar group.

Processing Options

Calculate Select to have the system create the payment file by matching the approved and finalized results from the payroll process with information that you defined in banking setup.

You can run the calculate step repeatedly until you finalize the banking process.

Finalize Select, after everything is calculated. (If you use stream processing for the Calculate phase, the system finalizes all streams for the calendar group simultaneously.)

Note. If you're not using streams, you can select *Calculate* and *Finalize* at the same time.

Update Statistics Select to have the banking system generate statistics to help the data administrator fine-tune system performance.

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Streams

This group box displays all streams that are associated with the calendar group.

Calendars in Run

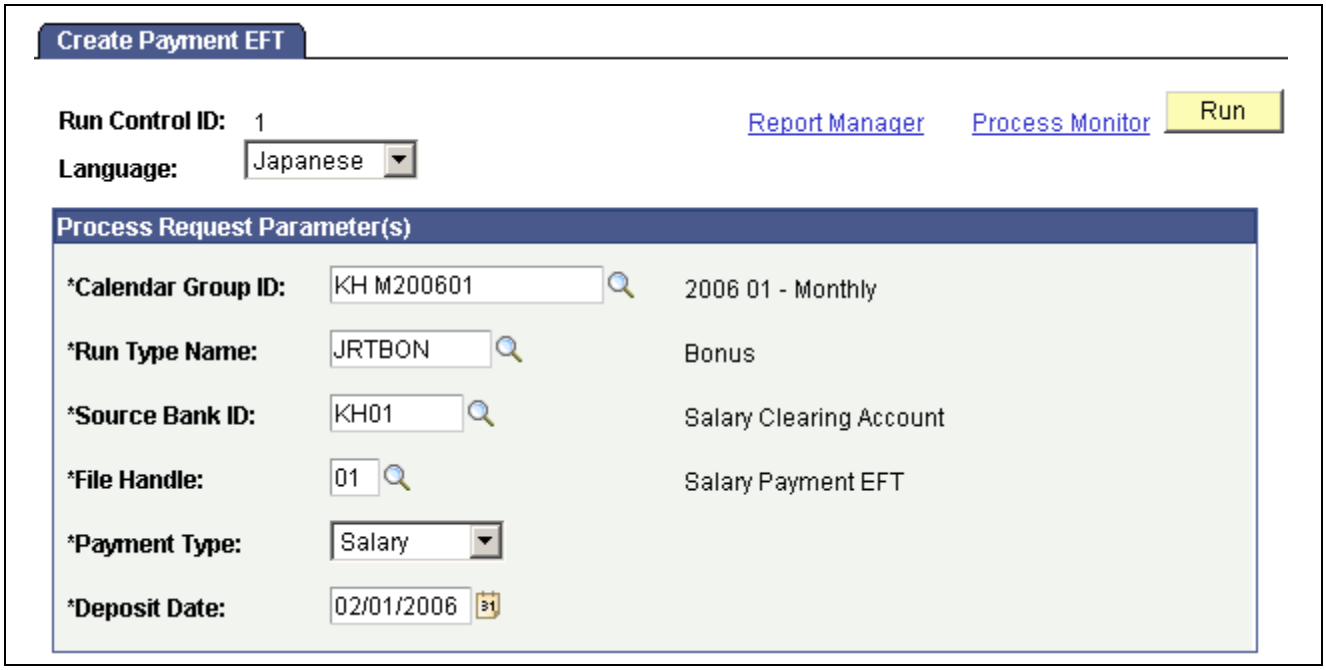
After you run the Calculate phase, this group box displays information for each calendar in the calendar run.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Processing Payroll," Creating Process Streams

Creating Payment EFT

Access the Create Payment EFT page.



Create Payment EFT page

All of the fields on this page are required to run the process.

Calendar Group ID The EFT process uses the values that you select in the Calendar Group ID, Run Type Name, and Source Bank ID fields to extract the appropriate information from the GP_PAYMENT table.

File Handle The file handle set up on the File Handle Table page that identifies the file name and character set used in this process.

Payment Type Valid values are *Salary* and *Bonus*. This data appears in the header of the EFT file.

Deposit Date This date appears in the header of the EFT file.

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CHAPTER 18

Generating Payslips

This chapter lists prerequisites and discusses how to generate payslips.

Prerequisites

Before generating payslips, you must perform the following setup:

1. Define the data element positions on your payslip forms.
2. Define payslip templates.
3. Assign payslip templates to pay groups and run types.

See Also

Chapter 4, "Setting Up Insurance, Taxes, and Payslips," Setting Up Payslips, page 32

Viewing Delivered Elements

The PeopleSoft system delivers a query that you can run to view the names of all delivered elements designed for Japan. Instructions for running the query are provided in the *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Viewing Delivered Elements," Understanding How to View Delivered Elements

Generating Payslips

This section provides an overview of payslip generation and discusses how to run payslips.

Understanding Payslip Generation

Before generating payslips, you must set up payslip templates to specify each data element in the report and its exact location on the page. The header at the top of the report always contains department ID, employee ID, employee name, report title, remarks, and company name.

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Use the Payslip run control page to print any of the following:

- Regular (salary) payslip.
- Bonus payslip.
- Tax Amount Difference report (year-end adjustment payslip).
- Retirement allowance.

The Payslip page launches two processes in sequence:

1. The GPJP_PP01_AE Application Engine process gathers information and creates an intermediate table.
2. The Structured Query Report (SQR) GPJPPP01 prints the payslip.

   PeopleSoft provides a sample of a common payslip format. You might have to change the SQR to work with the specific form and printer that you're using. You must modify only the SQR if you require specific formatting for payslips.

Use the parameters on the Payslip page to narrow the selection of employees within the calendar group ID that is selected. The system selects the appropriate payslip template for each employee by pay group for the run type of the calendar group.

You may also enter parameters to define print options and specify a sort order.

Note. Each calendar group can have only one run type, which means that you must set up a unique calendar group ID for each regular, bonus, year-end tax adjustment, or retirement allowance pay run.

See Also

Chapter 4, "Setting Up Insurance, Taxes, and Payslips," Setting Up Payslips, page 32

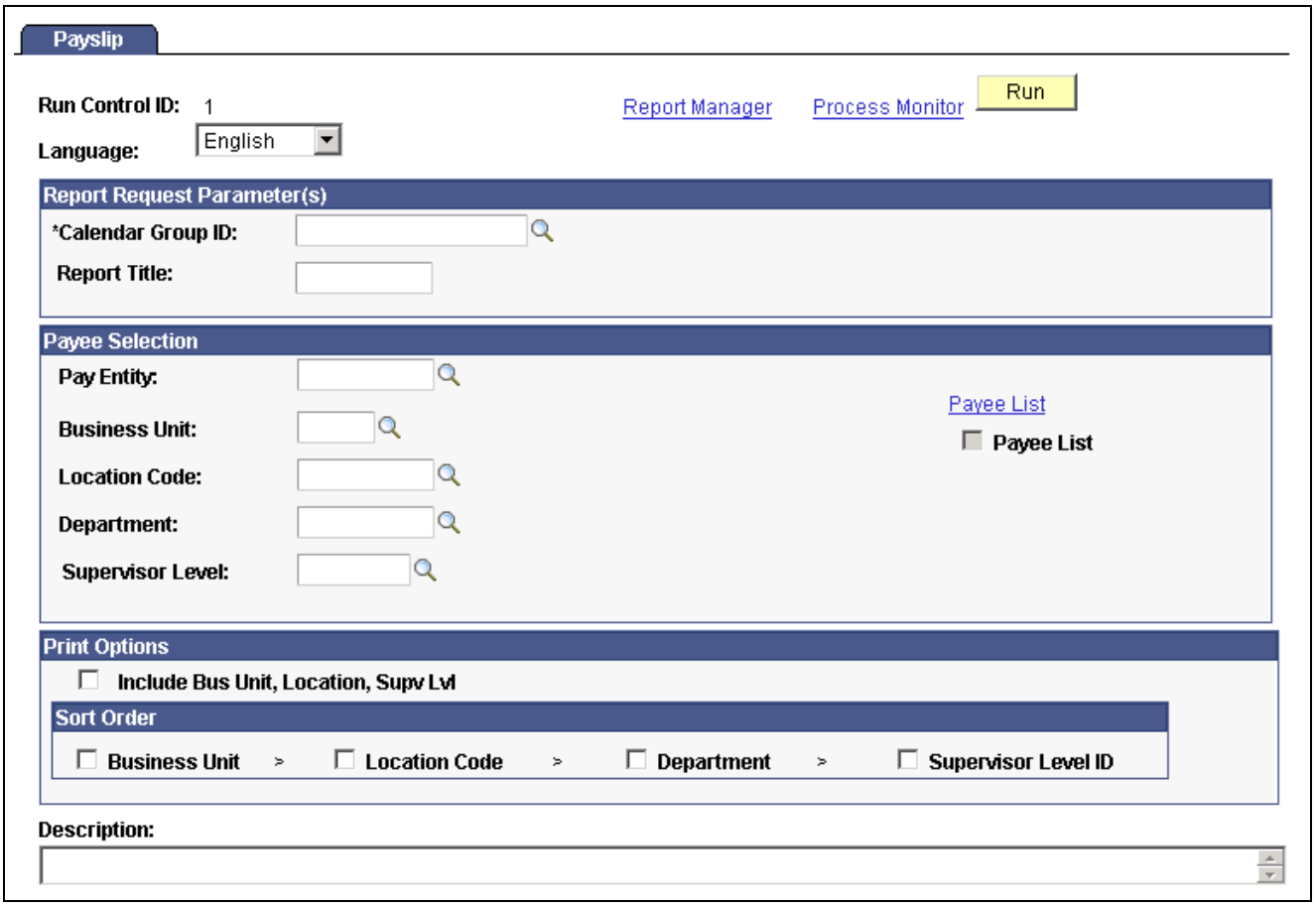
Page Used to Generate Payslips

Page Name	Object Name	Navigation	Usage
Payslip	GPJP_RC_PP01	Global Payroll & Absence Mgmt, Payslips, Create/Print Payslips JPN, Payslip	Run the payslip report (GPJPPP01), which prints a regular (salary) payslip, a bonus payslip, the Tax Amount Difference report (year-end adjustment payslip), or retirement allowance. Define print options and sort order for the payslip.

Running Payslips

Access the Payslip page.

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Payslip page

Report Request Parameter(s)

Calendar Group ID Only finalized pay runs are available.

Report Title This prints at the top of the payslip.

Payee Selection

Pay Entity If you select only this parameter, the system prints payslips for all employees who are in the pay entity and calendar group. To narrow the payee group further, select additional parameters.

Business Unit Required field if you select a department or location.

Location Code To print payslips for a particular location, select one that is in the business unit that you specified.

Department To print payslips for a particular department, select one that is in the business unit that you specified.

Supervisor Level To print payslips for the employees with a particular supervisor level, select one that is in the business unit that you specified.

Payee List Click this link to access the Payee List page, where you can select any number of individual employees for the payslip run. Employees must be in the calendar group that was selected on the Generate Payslips page.

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When you return to the Generate Payslips page, the check box is selected.

Print Options

Include Bus Unit, Location, Supv Lvl (include business unit, location, supervisor level)

Select the Include Bus Unit, Location, Supv Lvl check box if you want the business unit, location, and supervisor level to appear on the payslip.

Sort Order

Select the sort order in which you want the payslip to print. Options include *Business Unit, Location Code, Department,* and *Supervisor Level ID.*

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CHAPTER 19

Managing Off-Cycle Payments

This chapter provides an overview of:

- Off-cycle processing.
- Manual payments.
- Corrections.
- Unscheduled payments.
- Advance payrolls.

Note. Please refer to *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook* for information about off-cycle setup and processing.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Managing Off Cycle Processing"

Understanding Off-Cycle Processing

This section discusses:

- The off-cycle process.
- Types of off-cycle transactions.
- Delivered elements.

The Off-Cycle Process

Off-cycle processing refers to processing payments and making corrections to payroll results outside of the normal payroll schedule. Off-cycle transactions are usually made to correct prior payments, enter manual payments, or make early termination payments that can't wait until the next scheduled payroll.

Types of Off-Cycle Transactions

The four types of off-cycle transactions are:

- Manual payments

  Manual payments enable you to enter payments that you have calculated and paid outside the payroll system. Examples include paying a new hire with a manual check because their pay details were not entered in time for the normal pay run.

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- Corrections

  Corrections enable you to correct results of any finalized payroll. Examples include reversing a sick leave payment when workers compensation should have been paid.

- Unscheduled payments

  Unscheduled payments enable you to enter one-time payments that are outside the normal payroll process. Examples include one-time bonuses or expense reimbursement.

- Advances

  Advances enable you to pay payees before their normally scheduled pay run. Examples include salary due on termination.

Delivered Elements

The PeopleSoft system delivers a query that you can run to view the names of all delivered elements designed for Japan. Instructions for running the query are provided in the *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Viewing Delivered Elements," Understanding How to View Delivered Elements

Understanding Manual Payments

This section provides an overview of manual payments.

Manual Payments

When you enter manual payments for Japanese payees, all calculations should be calculated outside the system and then entered. Observe the following guidelines when entering manual payments:

- Selecting the *Period (Calendar) Paid* and *Payment Date* on the Period Calendar tab of the Manual Payments page.

  The selection of the period paid and the payment date need to be considered carefully. When selecting the period paid, you should select the previous finalized calendar or the current open calendar. The selection of the payment date directly affects how elements are accumulated. For example, if you have an accumulator that accrues based on period end date, the payment date may not update the accumulator balances at the right time.

- Selecting processing controls on the Manual Payments page.

  The *Period Begin Date* and *Period End Date* should be supplied by default after you select *Period (Calendar) Paid.* These dates should not be changed because the delivered Japanese rules have been designed to calculate using whole periods and may not automatically segment if a partial period is entered.

  The run type comes from *Period (Calendar) Paid* and the defaults should be used. To ensure that the payee's manual payment is processed by the system, the Allow Duplicates check box must be selected on the run type; otherwise, the payee may not be processed again if the system detects that the payee has already been processed in the period.

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Stop Regular Resolution enables you to stop the resolution of all elements on the process list except the elements that are entered into the manual payment. If you decide to allow regular resolution, an analysis would need to be performed to understand the impact on your supporting elements.

If using the Limited Element Set, you need to ensure that all elements are calculated independently of pre- or post-processing formulas, because these do not resolve during off-cycle processing.

Note. Manual payments are used to record monetary values only; absence accumulators will not be updated using this method.

Corrections

Use the Corrections page of the Off-Cycle Requests component (GP_OFFCYCLE_SETUP) when you need to change finalized results, usually due to a user error. This page uses period-to-date logic that is built into the Japanese delivered statutory rules.

When you enter corrections, all earnings and deductions need to have period-to-date logic applied. This method is used to correct pay accumulators only. Absence accumulators will not be corrected.

Unscheduled Payments

Use the Unscheduled Payments page of the Off-Cycle Requests component (GP_OFFCYCLE_SETUP) to make one-time payments that are processed outside of the on-cycle payroll. Examples include bonuses and expense reimbursements. This page uses period-to-date logic that is built into the Japanese-delivered statutory rules when calculating.

Consider the following guidelines when entering unscheduled payments:

- All earnings and deductions need to have period-to-date logic applied.
- When selecting the period paid, you should select the previous finalized calendar or the current open calendar.
- Use this page to record monetary values only.

  Absence accumulators will not be updated.

Advance Payrolls

Use the Advance Payrolls page of the Off-Cycle Requests component (GP_OFFCYCLE_SETUP) when you would like to pay an employee before his or her normal on-cycle pay run. For example, an employee is terminating employment with your organization and the termination payment needs to be paid immediately and not in the next on-cycle payrun. When making advance payments:

- Always select the next open calendar, because skipping calendars may update accumulators incorrectly.
- Absence accumulators will calculate automatically for the calendar group that is selected.

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APPENDIX A

Global Payroll for Japan Reports

This appendix discusses how to:

- View summary table of all reports.
- View a list of generic report templates for Japan.

Note. For samples of these reports, see the PDF files that are published on CD-ROM with your documentation.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Setting Up and Running Generic Reports"

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Global Payroll for Japan Reports: A to Z

This table lists the Global Payroll for Japan reports, sorted alphanumerically by report ID. For more information about a report, refer to the report details at the end of this appendix.

Report ID and Report Name	Description	Navigation	Run Control Page
GPJPBA01 EFT Payment File	Generated as part of the EFT process, it prints the information transferred to the bank by the EFT process.	Global Payroll & Absence Mgmt, Payment Processing, Create EFT Payment File JPN, Create Payment EFT	GPJP_RC_BA01
GPJPIH01 Municipality Audit Report	Lists error messages for employees with invalid postal code and municipality code in their legal (or home) addresses.	Global Payroll & Absence Mgmt, Taxes, Municipality Audit Rpt JPN, Municipality Audit	GPJP_RC_IH_AUD
GPJPIH02 Monthly Inhabitant Tax Report	Provides the number of inhabitant tax collections and the total amount collected for each municipality for each pay period.	Global Payroll & Absence Mgmt, Taxes, Mthly Inhabitant Tax Rpt JPN, Monthly Inhabitant Tax Report	GPJP_RC_IH_MNTH

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Report ID and Report Name	Description	Navigation	Run Control Page
GPJPIT01 Withholding Tax Register	Prints payroll data in the following categories: employee identification, salary data, bonus data, PTO data, former employment data, total amounts data, retirement allowance, and year-end adjustment data.	Global Payroll & Absence Mgmt, Taxes, Inc Tax Withhold Reg Rpt JPN, Inc Tax Withholding Register	GPJP_RC_IT_WHRG
GPJPLA01 EI Exempt Report	Lists employees who are exempt from labor insurance premium because of age.	Global Payroll & Absence Mgmt, Social Security/Insurance, ANN – EI Exempt Report JPN, EI Exempt Report	GPJP_RC_LA01
GPJPLA02 Basic Employment Insurance Premium Report	Provides the workers compensation and employment insurance wage information that you need to complete the Insurance Premium report that you must submit each May.	Global Payroll & Absence Mgmt, Social Security/Insurance, ANN – Basic EI Premium Rpt JPN, Basic EI Premium Report	GPJP_RC_LA01
GPJPLA03 EI Enrollment File Generation Log	Generates a list of new employees.	Global Payroll & Absence Mgmt, Social Security/Insurance, EI Newly Enroll Empl Rpt JPN, EI Newly Enrolled Employee Report	GPJP_RC_LA_PYE_RPT
GPJPPP01 Payslip	Prints regular (salary) payslip, bonus payslip, retirement allowance payslip, or Tax Amount Difference report (year-end adjustment payslip).	Global Payroll & Absence Mgmt, Payslips, Create/Print Payslips JPN, Payslips	GPJP_RC_PP01
GPJPSC01 Monthly Standard Remuneration Revised Report	Lists social insurance and remuneration information for all employees whose subject indicator is Occasional Revision.	Global Payroll & Absence Mgmt, Social Security / Insurance, SI Mthly Rev Remun Rpt JPN, SI Mthly Remun Rpt (Revised)	GPJP_RC_SC01
GPJPSC02 Monthly Standard Remuneration Regular Report	Lists social insurance and remuneration information for all employees whose subject indicator is Regular Decision.	Global Payroll & Absence Mgmt, Social Security / Insurance, ANN – SI Mthly Reg Remun Rpt JPN, SI Mthly Remun Rpt (Regular)	GPJP_RC_SC03
GPJPSC03 Monthly Standard Remuneration Summary Report	Summarizes information about employees subject to regular decision and occasional revision.	Global Payroll & Absence Mgmt, Social Security / Insurance, ANN – SI Mthly Sum Remun Rpt JPN, SI Mthly Remun Rpt (Summary)	GPJP_RC_SC03

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Report ID and Report Name	Description	Navigation	Run Control Page
GPJPSC04 PI 70 Years Old Employee Report	Lists employees who became ineligible for Employees' Pension Insurance premium due to reaching the age of 70.	Global Payroll & Absence Mgmt, Social Security / Insurance, PI 70 Years Old EE Rpt JPN, PI 70 Years Old Employee Rpt	GPJP_RC_SC04
GPJPSC06 Bonus Payment Report	Print a bonus payment report.	Global Payroll & Absence Mgmt, Social Security/Insurance, SI Bonus Payment Report JPN, Bonus Payment Rpt	GPJP_RC_SC_BNS
GPJPSC07 SI Premium Inquiry Report	Create the social insurance premium report file.	Global Payroll & Absence Mgmt, Social Security/Insurance, SI Premium Inquiry Rpt JPN, SI Premium Inquiry Rpt JPN	GPJP_RC_SC_CHK
GPJPSC08 SI Premium Summary Report	Summarize information about the social insurance premium for all employees.	Global Payroll & Absence Mgmt, Social Security/Insurance, SI Premium Summary Rpt JPN, SI Premium Summary Rpt JPN	GPJP_RC_SC_GRD
GPJPUC01 Unemployment Certificate	Print an unemployment certificate.	Global Payroll & Absence Mgmt, Termination Processing, Print Unemployment Cert JPN, Unemployment Cert	GPJP_RC_UC_RPT
GPJPWC01 Wage Certificate at 60	Print Wage Certificate at 60.	Global Payroll & Absence Mgmt, Social Security / Insurance, Print Wage Cert at 60 JPN	GPJP_RC_WC_RPT
GPJPYE01 Withholding Tax Report (YEA) and Withholding Tax Report (Termination)	Reports income, deductions, and insurance premiums. Deliver this report to all employees after year-end adjustment has been processed and at midyear for terminating employees. You also deliver this report to tax offices for employees who meet specific criteria.	• Global Payroll & Absence Mgmt, Year-End Processing, Withholding Tax Report JPN, W/H Tax Report • Global Payroll & Absence Mgmt, Termination Processing, Withholding Tax Report JPN, W/H Tax Report	GPJP_RC_YEAWHRPT
GPJPYE01 Wage Payment Report	This is the same SQR as the Withholding Tax Report, but with different parameters to select, sort, and report the data.	Global Payroll & Absence Mgmt, Year-End Processing, Wage Payment Rpt JPN, Wage Payment Rpt	GPJP_RC_YEAWGRPT
GPJPYE02 Legal Payment Summary Report	Contains information for the Legal Payment Summary report that you submit to the tax office.	Global Payroll & Absence Mgmt, Year-End Processing, Legal Payment Summary Rpt JPN, Legal Payment Rpt	GPJP_RC_YEA

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Report ID and Report Name	Description	Navigation	Run Control Page
GPJPYE03 Wage Payment Summary Report	Contains information for the Wage Payment Summary report that you submit to municipalities.	Global Payroll & Absence Mgmt, Year-End Processing, Wage Payment Summary Rpt JPN, Wage Payment Summary	GPJP_RC_YEA
GPJPYE04 YEA Dependent Deduction Report	For manual data collection, print the report and distribute it to employees for review and update. For self-service data collection, print the report for record-keeping purposes after employees have updated their data in the PeopleSoft Enterprise ePay transaction.	Global Payroll & Absence Mgmt, Year-End Processing, Report YEA Dependent Ded JPN, YEA Dependent Deduction	GPJP_RC_YEA04
GPJPYE05 YEA Insurance and Spouse Report	For manual data collection, print the report and distribute it to employees for review and update. For self-service data collection, print the report for record-keeping purposes after employees have updated their data in the ePay transaction.	Global Payroll & Absence Mgmt, Year-End Processing, Report YEA Ins and Spous JPN, YEA Insurance and Spouse	GPJP_RC_YEA05

Running Generic Global Payroll Reports for Japan

Global Payroll provides the framework for you to define generic reports of basic payroll results.

Generic Report Templates for Japan

PeopleSoft delivers the following templates specifically for payroll reporting in Japan:

- JGR01 - Earning/Deduction List (Salary).
- JGR02 - Accumulator List (Salary).
- JGR03 - Earning/Deduction List (Bonus).
- JGR04 - Accumulator List (Bonus).
- JGR05 - Wage Ledger.
- JGR06 - Absence and Overtime List .
- JGR07 - Withholding Tax (Terminated).
- JGR08 - Retirement Allowance.

See *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*, “Setting Up and Running Generic Reports”.

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Glossary of PeopleSoft Enterprise 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 Enterprise Human Resources, PeopleSoft Enterprise Benefits

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Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft Enterprise 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 Enterprise 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 Enterprise 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 Enterprise 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

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	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 Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for *receivables specialist.* In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	The arbiter when multiple price rules match the transaction. This plan determines the order in which the price rules are applied to the transaction base price.
assessment rule	In PeopleSoft Enterprise 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 Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
auction event	In PeopleSoft Strategic Sourcing, a sourcing event where bidders actively compete against one another to achieve the best price or score.
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 Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
bid response	In PeopleSoft Strategic Sourcing, the response by a bidder to an event.
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 Enterprise 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."

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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 Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Enterprise 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 Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.

See also *detailed business process.*

business unit constraints In PeopleSoft Strategic Sourcing, these constraints apply to a selected Strategic Sourcing business unit. Spend is tracked across all of the events within the selected Strategic Sourcing business unit.

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 Enterprise 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.

buy event In PeopleSoft Strategic Sourcing, for event creators, the purchase of goods or services, most typically associated with a request for quote, proposal, or reverse auction.For bidders, the sale of goods or services.

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.

cash drawer A repository for monies and payments taken locally.

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 Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.

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catalog partner In PeopleSoft Enterprise 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 Enterprise 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 Enterprise 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.

claimback In the wholesale distribution industry, a contract between supplier and distributor, in which monies are paid to the distributor on the sale of specified products or product groups to targeted customers or customer groups.

class In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

Class ChartField A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

clone In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

cohort In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

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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, PeopleTools maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft Enterprise Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

comm key See *communication key.*

communication key In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

compensation object In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

component interface A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.

condition In PeopleSoft Enterprise 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 Enterprise. 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).

constraint A business policy or rule that affects how a sourcing event is awarded. There are three types of constraints: business, global, and event.

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

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	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 plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost plus pricing	In PeopleSoft Enterprise Pricer, a pricing method that begins with cost of goods as the basis.
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.
counter sale	A face-to-face customer transaction where the customer typically selects items from the storefront or picks up products that they ordered ahead of time. Customers pay for the goods at the counter and take the goods with them instead of having the goods shipped from a warehouse.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab. See also *class.*
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

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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 Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.

delivery method type

In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

detailed business process

A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

dimension

In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

direct receipt

Items shipped from a warehouse or vendor to another warehouse.

direct ship

Items shipped from the vendor or warehouse directly to the customer (formerly referred to as *drop ship*).

directory information tree

In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.

division

In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *cohort*.

document sequencing

A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree

A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table

A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft Enterprise 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 Enterprise applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger

Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

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elimination set In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft Enterprise 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 Enterprise 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 Enterprise Human Resources, also refers to an incident that affects benefits eligibility.

event constraints In PeopleSoft Strategic Sourcing, these constraints are associated with a specific sourcing event. Spend is tracked within the selected event.

event propagation process In PeopleSoft Enterprise 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. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.

exclusive pricing In PeopleSoft Enterprise 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 Enterprise 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.

financial sanctions For U.S. based companies and their foreign subsidiaries, a federal regulation from the Office of Foreign Assets Control (OFAC) requires that vendors be validated against a Specially Designated Nationals (SDN) list prior to payment.

For PeopleSoft Payables, eSettlements, Cash Management, and Order to Cash, you can validate your vendors against any financial sanctions list (for example, the SDN list, a European Union list, and so on).

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.

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fund In PeopleSoft Enterprise Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

gap In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

generic process type In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.

gift table In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise 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.

GDS Abbreviation for *Global Distribution System.* Broad-based term to describe all computer reservation systems for making travel plans.

GL business unit Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit.*

GL entry template Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

global constraints In PeopleSoft Strategic Sourcing, these constraints apply across multiple Strategic Sourcing business units. Spend is tracked across all of the events from the multiple Strategic Sourcing business units.

group In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Enterprise 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 Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.

ideal response In PeopleSoft Strategic Sourcing, a question that requires the response to match the ideal value for the bid to be considered eligible for award. If the response does not match the ideal value, you can still submit the bid, but it will be disqualified and ineligible for award.

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, and user interaction objects.

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incentive rule In PeopleSoft Enterprise 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 Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

initiative In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access.*

institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

integration A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.

integration point An interface that a system uses to communicate with another PeopleSoft Enterprise 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 Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Enterprise 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 Enterprise 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.

itinerary In PeopleSoft Expenses, a collection of travel reservations. Itineraries can have reservations that are selected and reserved with the travel vendor. These itineraries are not yet paid for and can be referred to as *pending reservations.* Reservations that have been paid for are referred to as *confirmed reservations.*

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.

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keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

KVI Abbreviation for *Known Value Item.* Term used for products or groups of products where the selling price cannot be reduced or increased.

landlord In PeopleSoft Real Estate Management, an entity that owns real estate and leases the real estate to tenants.

LDIF file Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft Enterprise 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.

lease In PeopleSoft Real Estate Management, a legally binding agreement between a landlord and a tenant, where the tenant rents all or part of a physical property from the landlord.

lease abstract In PeopleSoft Real Estate Management, a summarized version of the complete lease contract with only the important terms. The lease abstract usually fits on one page and does not include legal terminology.

ledger mapping You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

line In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

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linked section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

LMS Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise 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 Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality In PeopleSoft Enterprise HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task In PeopleSoft Enterprise Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

mass change In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also *3C engine.*

match group In PeopleSoft Enterprise Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity In PeopleSoft Enterprise 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.

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meta-SQL Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook In PeopleSoft Enterprise 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 Enterprise 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.

NDP Abbreviation for *Non-Discountable Products.* Term used for products or groups of products where the selling price cannot be decreased.

need In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called *need analysis.*

node-oriented tree A tree that is based on a detail structure, but the detail values are not used.

Optimization Engine A PeopleTools component that Strategic Sourcing leverages to evaluate bids and determine an ideal award allocation. The award recommendation is based on maximizing the value while adhering to purchasing and company objectives and constraints.

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 Enterprise and non-PeopleSoft Enterprise content.

participant In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

participant object Each participant object may be related to one or more compensation objects.

See also *compensation object.*

partner A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle In PeopleSoft Enterprise 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 Enterprise 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.

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PeopleCode PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise 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 Enterprise applications wherever PeopleCode can be executed.

PeopleCode event See *event.*

PeopleSoft Pure Internet Architecture The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.

performance measurement In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.

period context In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.

person of interest A person about whom the organization maintains information but who is not part of the workforce.

personal portfolio In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.

phase A level 1 task, meaning that if a task had subtasks, the level 1 task would be considered the phase.

pickup quantity The product quantity that the customer is taking with them from the counter sales environment.

plan In PeopleSoft Enterprise 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 Enterprise 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

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	Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also *division* and *cohort.*
portal registry	In PeopleSoft Enterprise 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.
predecessor task	A task that you must complete before you start another task.
price breaks	In PeopleSoft Strategic Sourcing, a price discount or surcharge that a bidder may apply based on the quantity awarded.
price components	In PeopleSoft Strategic Sourcing, the various components, such as material costs, labor costs, shipping costs, and so on that make up the overall bid price.
price list	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	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 conditions	Conditions that select the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields relate to the transaction.
price rule key	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 Enterprise 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.

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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 Enterprise 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 appear with the product name and release number.

product adds The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as *giveaways*).

product bidding In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft 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 Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.

product line The name of a PeopleSoft Enterprise 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 Enterprise 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 Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Enterprise 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.

proxy bidding In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

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publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

record group A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

record input VAT flag Abbreviation for *record input value-added tax flag.* Within PeopleSoft Enterprise 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 Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

recname The name of a record that is used to determine the associated field to match a value or set of values.

recognition In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

reference data In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.

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 Enterprise 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.

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REN server Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reservations In PeopleSoft Expenses, travel reservations that have been placed with the travel vendor.

reversal indicator In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

RFI event In PeopleSoft Strategic Sourcing, a request for information.

RFx event In PeopleSoft Strategic Sourcing, a request for proposal or request for a quote event when bidders submit their overall best bids and during which bidders do not actively compete against one another.

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.

saved bid In PeopleSoft Strategic Sourcing, a bid that has been created but not submitted. Only submitted bids are eligible for award.

score In PeopleSoft Strategic Sourcing, the numerical sum of answers (percentages) to bid factors on an event. Scores appear only to bidders on auction events.

SCP SCBM XML message Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* 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.

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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.

sell event In PeopleSoft Strategic Sourcing, for event creators, the sale of goods or services most typically associated with forward auctions. For bidders, the purchase of goods or services.

serial genealogy In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Enterprise 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 Enterprise 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 Enterprise 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.

short-term customer A customer not in the system who is entered during sales order entry using a template.

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single signon With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise 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 Enterprise 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.

sourcing objective For constraints, the option to designate whether a business rule is required (mandatory) or is only recommended (target).

speed key See *communication key.*

SpeedChart A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

standard letter code In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Enterprise 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 Enterprise 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.

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summary tree A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.

system source The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).

When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).

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.

task A deliverable item on the detailed sourcing plan.

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 Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

tenant In PeopleSoft Real Estate Management, an entity that leases real estate from a landlord.

territory In PeopleSoft Enterprise 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 Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.

tiered pricing Enables different portions of a schedule to be priced differently from one another.

time span A relative period, such as year-to-date or current period, that various PeopleSoft General Ledger functions and reports can use when a rolling time frame, rather than a specific date, is required.

total cost In PeopleSoft Strategic Sourcing, the estimated dollar cost (sum of real price dollars and potential “soft” or non-price dollars) of a particular award approach.

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travel group In PeopleSoft Expenses, the organization's travel rules and polices that are associated with specific business units, departments, or employees. You must define at least one travel group when setting up the PeopleSoft Expenses travel feature. You must define and associate at least one travel group with a travel vendor.

travel partner In PeopleSoft Expenses, the travel vendor with which the organization has a contractual relationship.

3C engine Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

trace usage In PeopleSoft Enterprise 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 Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

tuition lock In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

unclaimed transaction In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

universal navigation header Every PeopleSoft Enterprise 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.

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	See also *inquiry access*.
user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise 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 Enterprise Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
weight or weighting	In PeopleSoft Strategic Sourcing, how important the line or question is to the overall event. Weighting is used to score and analyze bids. For RFx and RFI events, weightings may or may not appear to bidders.
work order	In PeopleSoft Enterprise 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 Enterprise Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.

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yield by operation In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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