ORACLE
PEOPLESOFT ENTERPRISE

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce

December 2006

ORACLE

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce
SKU HRCS9HAW-B 1206
Copyright © 1988-2006, Oracle. All rights reserved.

The Programs (which include both the software and documentation) contain proprietary information; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent, and other intellectual and industrial property laws. Reverse engineering, disassembly, or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. This document is not warranted to be error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose.

If the Programs are delivered to the United States Government or anyone licensing or using the Programs on behalf of the United States Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the Programs, including documentation and technical data, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement, and, to the extent applicable, the additional rights set forth in FAR 52.227-19, Commercial Computer Software--Restricted Rights (June 1987). Oracle Corporation, 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee's responsibility to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and we disclaim liability for any damages caused by such use of the Programs.

The Programs may provide links to Web sites and access to content, products, and services from third parties. Oracle is not responsible for the availability of, or any content provided on, third-party Web sites. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Oracle is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Oracle is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

Oracle, JD Edwards, PeopleSoft, and Siebel are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

Open Source Disclosure

Oracle takes no responsibility for its use or distribution of any open source or shareware software or documentation and disclaims any and all liability or damages resulting from use of said software or documentation. The following open source software may be used in Oracle's PeopleSoft products and the following disclaimers are provided.

Apache Software Foundation

This product includes software developed by the Apache Software Foundation (http://www.apache.org/). Copyright © 2000-2003. The Apache Software Foundation. All rights reserved. Licensed under the Apache License, Version 2.0 (the "License"); you may not use this file except in compliance with the License. You may obtain a copy of the License at http://www.apache.org/licenses/LICENSE-2.0.

Unless required by applicable law or agreed to in writing, software distributed under the License is distributed on an "AS IS" BASIS, WITHOUT WARRANTIES OR CONDITIONS OF ANY KIND, either express or implied. See the License for the specific language governing permissions and limitations under the License.

OpenSSL

Copyright © 1998-2005 The OpenSSL Project. All rights reserved.

This product includes software developed by the OpenSSL Project for use in the OpenSSL Toolkit (http://www.openssl.org/).

THIS SOFTWARE IS PROVIDED BY THE OpenSSL PROJECT "AS IS" AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE OpenSSL PROJECT OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

Loki Library

Copyright © 2001 by Andrei Alexandrescu. This code accompanies the book: Alexandrescu, Andrei. "Modern C++ Design: Generic Programming and Design Patterns Applied". Copyright © 2001 Addison-Wesley. Permission to use, copy, modify, distribute and sell this software for any purpose is hereby granted without fee, provided that the above copyright notice appear in all copies and that both that copyright notice and this permission notice appear in supporting documentation.

Helma Project

Copyright © 1999-2004 Helma Project. All rights reserved. THIS SOFTWARE IS PROVIDED "AS IS" AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE HELMA PROJECT OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

Helma includes third party software released under different specific license terms. See the licenses directory in the Helma distribution for a list of these license.

Sarissa

Copyright © 2004 Manos Batsis.

This library is free software; you can redistribute it and/or modify it under the terms of the GNU Lesser General Public License as published by the Free Software Foundation; either version 2.1 of the License, or (at your option) any later version.

This library is distributed in the hope that it will be useful, but WITHOUT ANY WARRANTY; without even the implied warranty of MERCHANTABILITY or FITNESS FOR A PARTICULAR PURPOSE. See the GNU Lesser General Public License for more details.

You should have received a copy of the GNU Lesser General Public License along with this library; if not, write to the Free Software Foundation, Inc., 59 Temple Place, Suite 330, Boston, MA 02111-1307 USA.

ICU

ICU License - ICU 1.8.1 and later COPYRIGHT AND PERMISSION NOTICE Copyright © 1995-2003 International Business Machines Corporation and others. All rights reserved.

Permission is hereby granted, free of charge, to any person obtaining a copy of this software and associated documentation files (the "Software"), to deal in the Software without restriction, including without limitation the rights to use, copy, modify, merge, publish, distribute, and/or sell copies of the Software, and to permit persons to whom the Software is furnished to do so, provided that the above copyright notice(s) and this permission notice appear in all copies of the Software and that both the above copyright notice(s) and this permission notice appear in supporting documentation. THE SOFTWARE IS PROVIDED "AS IS," WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO THE WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NONINFRINGEMENT OF THIRD PARTY RIGHTS. IN NO EVENT SHALL THE COPYRIGHT HOLDER OR HOLDERS INCLUDED IN THIS NOTICE BE LIABLE FOR ANY CLAIM, OR ANY SPECIAL INDIRECT OR CONSEQUENTIAL DAMAGES, OR ANY DAMAGES WHATSOEVER RESULTING FROM LOSS OF USE, DATA OR PROFITS, WHETHER IN AN ACTION OF CONTRACT, NEGLIGENCE OR OTHER TORTIOUS ACTION, ARISING OUT OF OR IN CONNECTION WITH THE USE OR PERFORMANCE OF THIS SOFTWARE. Except as contained in this notice, the name of a copyright holder shall not be used in advertising or otherwise to promote the sale, use or other dealings in this Software without prior written authorization of the copyright holder.

All trademarks and registered trademarks mentioned herein are the property of their respective owners.

Sun's JAXB Implementation – JDSDK 1.5 relaxngDatatype.jar 1.0 License

Copyright © 2001, Thai Open Source Software Center Ltd, Sun Microsystems. All rights reserved.

THIS SOFTWARE IS PROVIDED BY THE COPYRIGHT HOLDERS AND CONTRIBUTORS "AS IS" AND ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE REGENTS OR CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

W3C IPR SOFTWARE NOTICE

Copyright © 2000 World Wide Web Consortium, (Massachusetts Institute of Technology, Institut National de Recherche en Informatique et en Automatique, Keio University). All Rights Reserved.

Note: The original version of the W3C Software Copyright Notice and License could be found at http://www.w3.org/Consortium/Legal/copyright-software-19980720.

THIS SOFTWARE AND DOCUMENTATION IS PROVIDED "AS IS," AND COPYRIGHT HOLDERS MAKE NO REPRESENTATIONS OR WARRANTIES, EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO, WARRANTIES OF MERCHANTABILITY OR FITNESS FOR ANY PARTICULAR PURPOSE OR THAT THE USE OF THE SOFTWARE OR DOCUMENTATION WILL NOT INFRINGE ANY THIRD PARTY PATENTS, COPYRIGHTS, TRADEMARKS OR OTHER RIGHTS. COPYRIGHT HOLDERS WILL NOT BE LIABLE FOR ANY DIRECT, INDIRECT, SPECIAL OR CONSEQUENTIAL DAMAGES ARISING OUT OF ANY USE OF THE SOFTWARE OR DOCUMENTATION.

Contents

General Preface

About This PeopleBook Preface xxv

PeopleSoft Enterprise Application Prerequisites xxv

Application Fundamentals xxv

Documentation Updates and Printed Documentation xxvi

Obtaining Documentation Updates xxvi

Downloading and Ordering Printed Documentation xxvi

Additional Resources xxvii

Typographical Conventions and Visual Cues xxviii

Typographical Conventions xxviii

Visual Cues xxix

Country, Region, and Industry Identifiers xxix

Currency Codes xxx

Comments and Suggestions xxx

Common Elements Used in PeopleBooks xxx

Preface

PeopleSoft Enterprise Human Resources Administer Workforce Preface xxxiii

PeopleSoft Products xxxiii

PeopleSoft Enterprise HRMS Application Fundamentals xxxiii

PeopleBook Structure xxxiii

Chapter 1

Getting Started with Administer Workforce 1

Human Resources Administer Workforce Overview 1

Human Resources Administer Workforce Business Processes 2

Human Resources Administer Workforce Integrations 3

Human Resources Administer Workforce Implementation 3

Chapter 2

Setting Up the Administer Workforce Business Process 5

Defining Personnel Actions and Reasons 5

Understanding Personnel Action Reasons 5

Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Define Personnel Actions and Personnel Action Reasons.....7
Defining Personnel Actions.....7
Defining Personnel Action Reasons.....10
(USF) Defining Award Actions.....12
Pages Used to Define Award Actions.....13
Defining Award Codes.....13
Setting Up Template-Based Hire Templates.....14
Understanding Template-Based Hires.....15
Common Elements Used in this Section.....17
Pages Used to Set Up Template-Based Hire Templates.....18
Defining Template Records and Fields.....19
Setting Up Template Sections.....20
Defining Template Section Field Configurations.....22
Defining Hire Template Categories.....22
Creating a Hire Template.....23
Configuring a Hire Template.....23
Setting Up Hire Template Sections.....25
Setting Up Hire Template Person Rules.....26
Copying a Hire Template.....27
Defining Employee Identification.....28
Pages Used to Define Employee Identification.....28
Defining Visas and Work Permits.....28
Setting Up Military Data.....29
Understanding Military Ranking Structure.....30
Pages Used to Set Up Military Data.....31
Defining Military Service and Rank Structure.....31
Defining Service Ranks.....32
Associating Grades with Ranks.....33
Defining Additional Employment Setup Data.....34
Understanding Supervisor Levels.....34
Pages Used to Define Additional Employment Data.....35
Defining Ethnic Groups.....36
Setting Up Security Clearance Types.....37
Page Used to Set Up Security Clearance Types.....38
Defining Security Clearance Types.....38
Creating Checklists.....38
Understanding Checklists.....38
Pages Used to Create Checklists.....39
Setting Up Standard Checklists.....39
Setting Up Workforce Contracts.....41

Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Set Up Workforce Contracts....42
Defining Contract Types....42
Setting Up Standard Contracts....44
Define Contract Pay Types....45

Chapter 3
Setting Up Country-Specific Tables....47
Understanding Country-Specific Table Setup....47
(FRA) Setting Up French Workforce Tables....47
Understanding French Social Security Tracking Code Maintenance....48
Pages Used to Set Up French Workforce Tables....48
Maintaining INSEE Codes....49
Entering Salary and Social Security Ceiling Information....50
Defining Hours Type Codes....52
Entering French Occupational Illness Codes....52
(DEU) Setting Up German Workforce Tables....53
Understanding Accident Insurance....54
Pages Used to Set Up German Workforce Tables....54
Defining Accident Insurance Codes....55
Entering German Nation DEUEV Codes....56
(NLD) Setting Up Dutch SAMEN Countries....58
Understanding SAMEN Country Setup....58
Page Used to Set Up Dutch SAMEN Country Table....58
Updating the List of SAMEN Countries....58
(ITA) Setting Up Italian Workforce Tables....59
Pages Used to Set Up Italian Workforce Tables....59
Defining INPS Codes....62
Defining Seniority Notification Periods....64
(JPN) Setting Up Intercompany Transfer Company Data....64
Understanding Setup of Company Data for Intercompany Transfers....65
Pages Used to Set Up Intercompany Transfer Company Data....65
Setting Up Company Data for Intercompany Transfers....65
(MYS and SGP) Setting Up Festive Advance Religions Tables for Singapore and Malaysia....66
Page Used to Set Up Festive Advance Religions for Singapore and Malaysia....66
(NZL) Setting Up New Zealand Disability Codes....67
Page Used to Set Up New Zealand Disability Codes....67
(ESP) Setting Up Spanish Workforce Tables....67
Pages Used for Spanish Workforce Tables....68
Entering Country Codes for Social Security Reporting....69

Copyright © 1988-2006, Oracle. All rights reserved.

Entering Industry Activity Codes....69
Entering Insurance Company Descriptions and Address Information....70
Viewing Risk Codes....70
Defining Maximum and Minimum Social Security Ceilings....70
Defining Maximum and Minimum Social Security Bases by Work Group....71
Defining Contribution Rates and Percentages....73
Entering Social Security Company Information....75
Defining a Social Security Time Limit for FDI Data....76
Defining Spanish Hiring Centers....77
(BRA) Setting Up Brazilian Establishments....78
Pages Used to Set Up Establishments....79
Entering Types of Establishment ID Codes....79
Setting Up Establishments....80
Grouping Establishments for Centralized Data....85

Chapter 4
Understanding Organizational Relationships, Employment Record Numbers, and Multiple Jobs....87
Organizational Relationships....87
Personal Information Data for People with Organizational Relationships....88
Organizational Instances....88
Employment Record Numbers....91
Multiple Jobs....95
Multiple Employment Records Compared to Multiple Jobs....95
Multiple Jobs and PeopleSoft Human Resources....99
Multiple Jobs and Base Benefits....100
Multiple Jobs and PeopleSoft Benefits Administration....102
Multiple Jobs and PeopleSoft Payroll for North America....105
Multiple Jobs and PeopleSoft Pension Administration....106

Chapter 5
Adding a Person in PeopleSoft Human Resources....109
Adding a Person....109
Understanding Identification Assignment....109
Common Elements Used in This Component....110
Pages Used to Add a Person....110
Entering Name and Biographical Data....111
Entering Contact Information....115

Copyright © 1988-2006, Oracle. All rights reserved.

Entering Country-Specific Person Data....116
Creating Organizational Relationships and Maintaining Checklists....126
Controlling Data Access for POIs Without Jobs....128
Understanding Security for POIs Without Jobs....129
Pages Used to Control Access to the Data of POIs Without Jobs....129
Adding and Maintaining POI Types....129

Chapter 6
Increasing the Workforce....133
Understanding Job Data....133
Prerequisites....145
Adding Organizational Instances for Employees, Contingent Workers, and POIs....146
Common Elements Used in this Section....146
Pages Used to Add Organizational Instances for Employees, Contingent Workers, and POIs....147
Entering Employee Job Location and Position Information....152
Entering Job Information....160
Entering National Labor Agreement Data....171
Entering Payroll Processing Data....175
Entering Salary Plan Information....179
Entering Compensation Information....181
Entering Optional Employment-Related Data....185
Distributing Job Earnings....193
Specifying Benefit Program Enrollment....196
Creating a Person Checklist....197
Defining Applicant Referral Information....198
Creating an Employee Checklist....199
Adding Additional Assignments....200
Understanding the Process of Adding Additional Jobs....200
Working with Multiple Benefit Record Numbers....201
Prerequisites....202
Pages Used to Add Concurrent Jobs....202
Entering Additional Assignments....203
Adding Job Applicants....204
Pages Used to Add Job Applicants....205
Managing Hires....205
Reviewing Hire Details....206
Reviewing Organizational Relationships....208
Page Used to View a Person's Organizational Relationships....208
Viewing a Person's Organizational Relationships....208

Copyright © 1988-2006, Oracle. All rights reserved.

Increasing the Workforce Through Templates and Job Applicants....208
Understanding Template-Based Hires....209
Prerequisite....214
Pages Used to Increasing the Workforce Through Templates....220
Adding a Template-Based Hire....222
Entering Hire Details....222
Entering Employee Information....223
Completing the Hire when a Person Match is Found....226
Viewing the Status of a Template Based Hire....226
Managing Hires....227
(BRA) Running Brazil Employment Reports....228
Understanding the CAGED Report....228
Understanding Employee Registration....229
Pages Used to Run Brazil Employment Reports....229
Generating CAGED Reports....229
Generating Employee Registry Reports....230
(CAN) Running the Canadian Hire List Report....232
Page Used to Run the Canadian Hire List Report....232
(NLD) Running the First Day Notification....232
Understanding First Day Notifications....232
Pages Used to Set Up and Generate First Day Notifications....233
Setting Up the First Day Notification....233
Generating First Day Notifications....234
Viewing the First Day Notification Results....235

Chapter 7
(USF) Adding an Employment Instance....237
Understanding U.S. Federal Hiring....237
Common Elements Used in This Chapter....239
Adding an Employment Instance....239
Understanding Adding an Employment Instance....240
Pages Used to Add an Employment Instance....242
Creating a New Employment Instance....245
Entering Information for the Employment Instance....245
Entering PAR Remarks....247
Entering Job Tracking Information....248
Entering Employee Personal Information....249
Entering Birth Information....251
Entering Address Information....252

Copyright © 1988-2006, Oracle. All rights reserved.

Entering Veteran Information....252
Entering Marital Information....253
Entering Education Details....254
Entering Job Information....255
Specifying Benefit Programs....257
Entering Retirement Data....258
Tracking Information for Employees on Assignment....261
Entering NFC Job Information....261
Entering Position Information....263
Entering Employee Compensation Information....265
Entering Additional Compensation Information....267
Viewing Pay Rate and Compensation Calculations....268
Viewing Job Earnings Distributions....270
Entering Current and Historical Employment Information....271
Entering Expiration Dates....274
Entering Appointment Limits....274
Entering Additional Employment Information....275
Tracking Probation Dates....276
Tracking Nonpay Status Information....277
Entering Financial Disclosure Information....277
Viewing Component Interface Exceptions....278
Assigning Employees to Positions....279
Hiring Job Applicants....279
Printing Appointment Affidavits and Preliminary Employment Data Forms....279
Pages Used to Print the Forms....280

Chapter 8
Entering Additional Data in Human Resources Records....281
Understanding Additional Worker Data....281
Locating Personnel Records....282
Pages Used to Locate Personnel Records....282
Searching with the Search Dialogue....282
Searching for Person Information....284
Searching by National ID....284
Tracking Workforce Contracts....284
Pages Used to Track Workforce Contracts....286
Adding Basic Contract Information....286
Adding Special Contract Clause Information....289
Viewing Task Order Information....293

Copyright © 1988-2006, Oracle. All rights reserved.

Adding Signature Date, Responsible Party, and Probation Information....294
Generating the Contract Information Report....295
Entering Temporary Assignments....295
Understanding Temporary Assignments and Substantive Jobs....295
Pages Used to Process Temporary Assignments....297
Entering a Temporary Assignment....297
Running the Temporary Assignment Termination and Substantive Job Reactivation Process....298
Adding a Partial Temporary Assignment....298
Tracking Disabilities....299
Pages Used to Track Disabilities....299
Entering Disability Information....300
Documenting Disability Accommodations....307
(ITA) Running the ITA Disability Report....307
Handling Company Credit Cards....308
Understanding Credit Card Encryption....309
Prerequisite....309
Pages Used to Handle Company Credit Cards....310
Entering Credit Card Vendors....310
Assigning Cards to Workers....310
Encrypting Preexisting Credit Card Numbers....311
Handling Company Property....312
Pages Used to Handle Company Property....313
Identifying Company Property....313
Assigning Values to Company Property....314
Assigning Company Property to Workers....315
Tracking Dependent and Beneficiary Data....315
Understanding Dependent and Beneficiary Data....316
Pages Used to Track Dependent Identification Data....316
Entering Dependent and Beneficiary Name Information....317
Entering Dependent Address Information....319
Entering Dependent and Beneficiary Information....320
Entering Information About Court-Ordered Benefits for Dependents....327
(NLD) Viewing an Employee's Dependents and Beneficiaries....328
Entering Dependent Citizenship and Passport Information....329
Entering Dependent Visa and Permit Data....330
Tracking Emergency Contacts....331
Pages Used to Track Emergency Contacts....332
Entering Primary Address and Phone Information for Emergency Contacts....332
Managing Citizenship and Visa or Permit Information....334
Common Elements Used to Manage Citizenship and Visa or Permit Information....334

Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Manage Citizenship and Visa or Permit Information.....335
Tracking Employee Passport and Citizenship Information.....336
Entering an Employee's Visa or Permit Information.....337
Managing Driver's License Information.....338
Page Used to Manage Driver's License Information.....339
Entering License Numbers and Other Driving Record Information.....339
Entering Bank Account Information.....340
Pages Used to Enter Bank Account Information.....340
Recording a Person's Bank Account Information.....341
(GBR) Entering a Worker's Building Society Roll Number and Name.....344
(MEX) Specifying the Inter-bank Payment Code.....344
Tracking Volunteer Activity.....345
Page Used to Track Volunteer Activity.....345
Entering Information on Worker Volunteer Activities.....345
Setting Up and Tracking Military Service Availability and Job Update Approvals.....346
Pages Used to Enter and Track Military Service Availability and Job Update Approvals.....347
Entering Military Service Availability.....348
Tracking Approvals for Mass or Individual Job Updates.....348
Entering and Tracking Additional Workforce Data.....349
Pages Used to Enter and Track Additional Workforce Data.....350
Recording Badge Numbers.....350
Tracking a Worker's Business Expenses.....351
Tracking Prior Work Experience.....352
Entering Worker Images.....354
Setting Up and Tracking Security Clearance and Badge Access.....354
Understanding Security Clearance and Badge Access.....354
Pages Used to Track Security Clearance and Badge Access.....355
Setting Up Security Clearance.....355
Tracking Badge History.....357
Tracking Security Clearance History.....357
Setting Up Expiration Notification.....358
Searching for Pending Expirations.....358

Chapter 9
(BEL) Entering Additional Data for Belgian Workers.....361
Tracking Claeys Formula Calculations.....361
Pages Used to Track Claeys Formula Calculations.....362
Entering Codes for Events and Conditions that Result in Terminating Employment Contracts.....363
Defining Reason Codes for Ending Employment Contracts.....363

Copyright © 1988-2006, Oracle. All rights reserved.

Setting Up Belgian Employment Contract Statutes for Claeys Calculations....364
Linking Contract Statutes to RSZ Categories....365
Recording Information that Is Necessary for Terminating a Belgian Worker....366
Entering a Replacement Worker for the Employment Contract....367
Preparing for Severance Calculations....369
Understanding How Claeys Calculates Severance....369
Understanding How to Prepare for the Claeys Calculation....369
Pages Used to Prepare for Severance Calculations....370
Tracking Additional Seniority....370
Entering Protected Job Leave Information....371
Performing the Claeys Calculation....372
Pages Used to Perform the Claeys Calculation....373
Reviewing Claeys Calculation Variables....373
Calculating the Severance Amount....376
Running the Notification Report....378
Generating DIMONA Notifications....378
Understanding DIMONA Notifications....378
Pages Used to Generate DIMONA Notifications....379
Creating DIMONA Notifications....379
Reviewing DIMONA Notifications....380
Running the Social Report....381
Page Used to Run the Social Report....382

Chapter 10
Managing Country-Specific Workforce Data....383
(BRA) Providing Additional Information for Brazilian Employees....383
Page Used to Enter Additional Data for Brazilian Employees....383
(CAN) Providing Additional Information for Canadian Employees....383
Pages Used to Provide Additional Information for Canadian Employees....385
Entering OEEC Workforce Survey Responses....386
Recording Employee-Level Information About Official Language Use....386
(CHE) Running the Company Statistics Report....387
Page Used to Run the Company Statistics Report....387
(FRA) Providing Additional Information for French Workers....388
Pages Used to Provide Additional Information for French Workers....388
Tracking Mandate Information....388
Entering Worker Military Service Information....388
(NLD) Recording and Reporting SAMEN Diversity Information for Dutch Workers....390
Understanding the SAMEN Diversity Law and SAMEN Registration....390

Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Record and Report SAMEN Diversity Information for Dutch Workers.....390
Establishing a Worker's Ethnic Status.....391
Running the NLD Law SAMEN Statistics Report.....392
(ITA) Recording Additional Hiring Data for Italian Workers.....392
Pages Used to Record Additional Hiring Data for Italian Workers.....393
Running the Matricula Book Calculation Process.....393
(ITA) Recording End of Employment Information for Italian Workers.....394
Page Used to Record End of Employment Information for Italian Workers.....394
Recording Employee Resignation Dates and Normal Notice Periods.....395
(ITA) Running the Equal Opportunities Report.....395
Page Used to Run the Equal Opportunities Report.....396
Running the Equal Opportunities Report.....396
(USA) Managing I-9 Information.....398
Understanding I-9 Information Management.....398
Pages Used to Manage I-9 Information.....399
Completing and Submitttting Section 1 of the I-9 Form.....399
Completing the Preparer/Translator Certification.....401
Completing Sections 2 and 3 of the I-9 Form.....402
Updating or Requesting a New I-9 Form.....405
Printing I-9 Forms.....407
Running the I-9 Receipt/Expiration Report.....407
Archiving I-9 Data.....408
(USA) Determining U.S. Residency Status for Foreign Nationals.....408
Page Used to Determine U.S. Residency Status for Foreign Nationals.....408
Running the Substantial Presence Test.....408

Chapter 11
(ESP) Managing Spanish Reporting.....411
Setting Up XML Files.....411
Understanding XML File Setup.....411
Pages Used to Set Up XML Files.....414
Setting Up XML Code Tables.....414
Defining XML Sets.....415
Setting Up XML Node Tables.....415
Setting Up Node Mapping.....419
Defining XML Templates.....421
Mapping Contracts to XML Nodes.....422
Managing Contrata Communications.....422
Understanding Contrata Communication Management.....423

Copyright © 1988-2006, Oracle. All rights reserved.

Steps to Manage Contrata XML File Generation....425
Prerequisites....426
Pages Used to Manage Contrata XML File Generation....427
Defining the XML File....427
Generating the XML File for Contrata Reporting....428
Viewing Employee Details for Contrata Reporting....431
Previewing XML Files....432
Managing Response Files....433
Viewing Contrata Errors....433
Managing Delta Communications....434
Understanding Delta Communication Management....434
Steps to Manage Industrial Accident Information....436
Prerequisites....438
Pages Used to Manage Delta Communications....438
Defining the XML File....440
Generating the XML File for Delta Reporting....441
Viewing Employee Details for Delta Reporting....444
Previewing XML Files....445
Confirming the Sending of XML Files....446
Page Used to Confirm the Sending of XML Files....447
Confirming XML Files....447
Printing Contracts....448
Understanding Contract Printing....449
Understanding Contract Printing XML Setup....450
Understanding Contract Generation....451
Page Used To Print Contracts....453
Mapping Contract Types to XML Nodes....453
Creating PDF Form Definitions....454
Defining PDF Form Details....456
Mapping PDF Form Fields to XML Nodes....457
Generating and Printing Contracts for Employees....459
Reviewing and Editing Contract Data....461
Running the Batch Contract Printing Process....463
Generating AFI Flat Files....463
Understanding the AFI Process....464
Pages Used to Generate AFI Flat Files....465
Maintaining Employee AFI Data....465
Maintaining Detailed AFI Data for Employees....467
Creating the AFI File....470
Creating Employee Inquiries on the AFI Report....472

Copyright © 1988-2006, Oracle. All rights reserved.

Creating Company Inquiries on the AFI Report.....473
Reviewing Employee Data on AFI Files.....474

Chapter 12
(JPN) Tracking Additional Appointments (Kenmu).....477
Understanding Additional Appointments.....477
Internal and External Companies.....477
Setting Up Codes for Tracking Additional Appointments.....478
Understanding Dummy Codes.....478
Understanding Setup Steps for Additional Appointments.....479
Prerequisites.....480
Pages Used to Set Up Codes for Managing Additional Appointments.....481
Setting Up a Dummy Business Unit, Company, Department, and Location.....481
Designating Job Record Codes for Additional Appointments.....482
Setting Up Security for Tracking Additional Appointments.....482
Understanding Security for Additional Appointments.....483
Pages Used to Set Up Security for Additional Appointments.....484
Setting Up Additional Appointment Security.....484
Selecting Reports that Use Additional Appointment Security.....484
Setting Up to Handle Additional Appointment Terminations.....485
Recording and Viewing Employee Additional Appointments Data.....486
Pages Used to Record and View Employee Additional Appointments Data.....486
Adding, Changing, or Releasing Additional Appointments.....486
Recording Additional Appointment Details.....487
Distributing Cost.....489

Chapter 13
(JPN) Tracking Intercompany Transfers (Shukkou).....491
Understanding the Tracking of Intercompany Transfers.....491
Summary of Home and Host Data for Intercompany Transfers.....491
Prerequisites.....494
Setting Up Employee Data for Intercompany Transfers.....495
Tracking Intercompany Transfers.....495
Indicating the Home or Host Compensation Owner.....496
Entering and Maintaining Home and Host Data for Intercompany Transfers.....496
Single Company Using a Single PeopleSoft Enterprise HRMS Database: Scenarios A1-8.....497
Multiple Companies Using a Single PeopleSoft Enterprise HRMS Database: Scenarios B1-6.....501
Multiple Companies Using a Single HRMS Database: Scenarios C1-6.....505

Copyright © 1988-2006, Oracle. All rights reserved.

Working with Search Page Security....508
Running the Intercompany Transfer Report....510
Page Used to Run the Intercompany Transfer Report....510

Chapter 14
(JPN) Mass Organization Change....511
Understanding Mass Organization Change....511
Changing Plans for Restructuring an Organization....512
Understanding Change Plans for Restructuring An Organization....512
Pages Used to Change Plans for Restructuring an Organization....513
Creating an Organization Plan....513
Specify Headcount Plan by Department....514
View the Headcount Plan Listing....515
Aligning Employee Placement Plans with the New Organization Structure....516
Understanding Employee Placement Plans....516
Pages Used For Employee Placement Plans....517
Listing Ido Candidates....517
Transferring Entries by Department....518
Transferring Entries by Using Trees....519
Selecting *Tamatsuki* Transfer Candidates....521
Entering *Tamatsuki* Transfers....521
Listing *Tamatsuki* Placements....522
Transferring *Tamatsuki* Data to the Job Record....523
Deleting and Maintaining Transfer Data....523
Finalizing Organization and Employee Placement Plans....524
Understanding Finalizing Organization and Employee Placement Plans....524
Pages Used For Finalizing Organization and Employee Placement Plans....525
Creating an Organization Plan Checklist....525
Creating a Headcount Plan Listing....526
Running the Future Employee Assignment List....527
Running the Transfers After Organization Change Query....527
Running the Ido Employee Listing Report....527
Running the Mass Employee Transfer Process....528
Cleaning Up Temporary Data....528

Chapter 15
Updating Person and Job Information....531
Understanding the Process of Updating Person and Job Information....531

Copyright © 1988-2006, Oracle. All rights reserved.

Changing Personal Data....532
Changing Job Data....532
Locating Personnel Records....534
Changing and Deleting IDs....534
Understanding ID Modification....534
Pages Used to Change and Delete Employee IDs....535
Modifying IDs....535
Viewing the ID Change and Delete Process Log....536
Deleting Employment Record Numbers (ERNs)....537
Understanding the Delete ERNs Component....537
Pages Used to Delete ERNs....539
Defining Person ID/Empl_Rcd Field Names Maintained in the System....539
Defining Exceptions for Record Processing....540
Defining Exception Tables for ERN Deletion....542
Processing ERN Deletions....544
Listing and Reviewing ERN Deletion Results....545
Updating Personal Data....547
Understanding Types of Personal Data....548
Pages Used to Update Personal Data....548
Updating Effective-Dated Personal Information....549
Using Workflow to Update Person Addresses....550
Updating Emergency Contact Information....550
Modifying Addresses....550
Running Personal Data Reports....551
Pages Used to Run Personal Data Reports....551
Updating Job Data....552
Understanding Updating Effective-Dated Job Data....552
Understanding Security for Updating Job Data....553
Understanding Personnel Actions and Human Resources and Payroll Status....553
Pages Used to Update Job Data and Salary Data....556
Updating Effective-Dated Job Data....557
Entering Promotions....558
Entering Departmental Transfers....559
Entering Pay Rate Changes....560
Tracking Leaves of Absence....563
Entering Terminations and Retirements....564
Entering Deaths....565
Entering Rehires....566
Assigning Workers to Different Positions....566
Paying Workers on Disability....568

Copyright © 1988-2006, Oracle. All rights reserved.

Updating Military Ranks....568
Understanding Military Rank Updates in Job Data....568
Understanding Rank Tracking in Manage Profiles....569
Page Used to Synchronize Ranks in Job Data with Manage Profiles....569
Updating Organizational Instance and Assignment Relationships....570
Understanding Organizational Instance and Assignment Relationships....570
Prerequisites....570
Pages Used to Modify Organizational Instance and Assignment Relationships....571
Promoting an Assignment....571
Moving an Assignment to Another Instance....572
Demoting an Instance....573
Updating Salary Information....575
Pages Used to Update Salary Information....575
Refreshing Compensation....575
Page Used to Refresh Compensation....576
Running Job Data Reports....576
(JPN) Understanding Reporting Appointments for Job Data Changes....576
Common Element Used in This Section....578
Pages Used to Run Job Data Reports....578
(JPN) Running the Appointment Notification Report....580
(JPN) Running the Appointment List Report....582
(JPN) Running the Employee Assignment List Report....584
Viewing a Summary of All Job Records....585
Page Used to View a Summary of All Job Records....585
Refreshing Tables to Facilitate Reporting....585
Understanding the Process of Refreshing the Employees Table....585
Understanding the Process of Refreshing the Personal Data Table....587
Common Element Used in This Section....587
Pages Used to Refresh Tables to Facilitate Reporting....587
Running Database Audits....588
Page Used to Run Database Audits....588

Chapter 16
Viewing Summary Workforce Information....589
Viewing Worker Job History....589
Pages Used to View Employee Job History....589
Viewing Worker Job History....590
Viewing Compensation Information....593
(USF) Viewing Employee Personal and Job Data....595

Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to View Personal and Job Data....596
Viewing Employee Personal Data....596
Viewing Employee Job Data....597
Viewing Employee Benefit Programs....598
Viewing Other Summary Pages in PeopleSoft Enterprise Human Resources....599

Chapter 17
(USF) Administering Personnel Action Requests....601
Understanding the Administering PAR System....601
Common Elements Used in This Chapter....602
Prerequisites....602
Understanding Workflow....603
Tracking and Routing a PAR Through Reviews and Completion....603
Adding and Updating Data....604
Processing of PAR Actions....608
Initiating and Requesting Personnel Actions....608
Authorizing and Approving Personnel Actions....608
Processing Human Resources Personnel Actions....609
Canceling or Correcting a Personnel Action Request....609
Printing Request for Personnel Action (SF-52) and Notice of Personnel Action (SF-50) Reports....610
Pages Used to Print a Request for Personnel Action/Notice of Personnel Action....611
Printing an Action Request (SF-52)....612
Running the Personnel Action Report....612
Viewing Summary Pages....614
Generating a Personnel Action History Report....614
Page Used to Run the Personnel Actions History Report....615
Generating a Wage and Separation Report....615
Pages Used to Set Up and Run the ES-931 Wage and Separation Report....616
Entering ES-931 Employee Identification Information....616
Entering ES-931 Annual Leave Information....617
Entering ES-931 Severance Pay Information....618
Generating the ES-931 Report....619

Chapter 18
(USF) Processing Personnel Action Requests....621
Understanding PARs....621
Personnel Action Requests....621
Sample Setup of Pages Used by Employees and Supervisors....622

Copyright © 1988-2006, Oracle. All rights reserved.

Personnel Actions and Employee Status....624
Importance of Effective Dates....626
Multiple Actions with the Same Effective Date....627
Performing Common Personnel Actions....628
Page Used to Grant Performance Awards....629
Granting Performance Awards....629
Entering Promotional Information....631
Requesting Departmental Reassignments....632
Requesting Leave of Absence....633
Entering Terminations and Retirement Requests....634
Requesting a Supplemental or Correction Individual Retirement Record....634
Requesting Terminations Due to Death....634
Requesting to Rehire an Employee....635

Chapter 19
(USF) Processing Automatic Actions for Probation, Tenure, and WGIs....637
Understanding Automatic Action Processing....637
Prerequisites....637
Processing Automatic Actions....638
Performing Automatic Actions....639
Understanding the Menus and Pages Used for Each Automatic Action Process....639
Pages Used to Perform Automatic Actions....640
Processing Automatic Actions....640
Running the Load Within Grade Increases Process....641
Administering Probation Termination Automatic Actions....641
Running the Probation Termination Automatic Action....642
Administering Tenure Conversion Automatic Actions....643
Running the Tenure Conversion Automatic Action....643
Understanding Changes Made to Employee Records During Tenure Conversion....644
Administering WGIs....645
Understanding the 60 Day WGI Notices....645
Understanding the Load Within Grade Increases Process....646
Running the WGI Automatic Action....647
Entering Data That Affects WGI Automatic Actions....648

Chapter 20
(USF) Managing Leave....651
Understanding Leave Administration....651

Copyright © 1988-2006, Oracle. All rights reserved.

Prerequisites....651
Automatic Leave Enrollment Administration....651
Leave Transfer Management....652
Administering Automatic Leave Enrollment....652
Pages Used to Administer Automatic Leave Enrollment....653
Setting Up the Leave Class Rules Template....653
Setting Up Leave Class Rule Criteria....655
Processing Auto Leave Enrollment....657
Reviewing Auto Leave Enrollment....657
Manually Entering or Adjusting Leave Enrollment....658
Setting Up Leave Transfer Programs....660
Pages Used to Set Up Leave Transfers....660
Setting Up Denial Codes and Denial Notification Letter Text....661
Setting Up Leave Transfer Programs....661
Setting Up Earnings Codes for Leave Transfer....662
Setting Up Earnings Accrual Classes for Leave Transfer....664
Setting Up Leave Class Rules for Leave Transfer....666
Administering Leave Donations....666
Pages Used to Administer Leave Donations....667
Entering Employee Requests To Contribute Leave To A Leave Bank Or Emergency Leave Transfer Program....667
Entering Employee Donations to Voluntary Leave Transfer Program....669
Entering Employee Requests To Donate To Another Agency's Leave Transfer Program....670
Running the Leave Bank and Transfer Process....670
Administering Leave Recipients....670
Page Used to Administer Leave Recipients....671
Enter Employee Requests to Receive Hours From Any of the Leave Program Types....671
Enrolling Recipients in the Leave Program Accrual Class....672
Running the Leave Bank and Transfer Process for Approved Recipients....672
Viewing the Data Entered by the Leave Bank and Transfer Process....673
Viewing Recipient Accrual Balances....673
Viewing Leave Transfer Data....673
Pages Used to View Leave Transfer Data....674
Viewing Leave Donations to Leave Bank and Emergency Leave Transfer Programs....674
Viewing Leave Donations to Voluntary Leave Transfer Programs....675
Viewing Donor and Recipient Accrual Summaries....675
Viewing Donor Contributions or Hours Received by Recipients....676
Viewing a Summary of Participation in a Leave Transfer Program....676
Reporting on Leave Transfer Programs....677

Copyright © 1988-2006, Oracle. All rights reserved.

Chapter 21
(USF) National Finance Center Processing.....679
Understanding NFC Processing.....679
Common Elements Used in this Chapter.....679
Understanding the Process Flow for the SINQ Import Process.....680
Understanding the Process Flow for SINQ Transactions.....683
Setting Up NFC Document Types.....685
Page Used to Set Up NFC Document Types.....685
Setting Up NFC Document Types.....685
Setting Up NFC SINQ Import Process Parameters.....686
Pages Used to Set Up NFC SINQ Import Process Parameters.....687
Defining NFC SINQ Import Documents to Process from the PACT Import File.....687
Defining System User IDs on the PACT File that Need Special Processing by the Import Process.....688
Running the NFC SINQ Import Process.....689
Page Used to Run the NFC SINQ Import Process.....689
Running the NFC SINQ Import Process.....689
Administering SINQs.....691
Pages Used to Administer SINQs.....691
Administering PACT SINQs.....691
Administering PMSO SINQs.....693
Working with SINQ Assignments.....694
Pages Used to Work with SINQ Assignments.....695
Working with PACT SINQ Assignments.....695
Working with PMSO SINQ Assignments.....696

Glossary of PeopleSoft Enterprise Terms.....697

Index 723

Copyright © 1988-2006, Oracle. All rights reserved.

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.

Copyright © 1988-2006, Oracle. All rights reserved.

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

Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your PeopleBook CD-ROM, Oracle makes PeopleSoft Enterprise documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

Downloading PDF Files

You can download PDF versions of PeopleSoft Enterprise documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, http://www.oracle.com/technology/documentation/psftent.html.

Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021

Copyright © 1988-2006, Oracle. All rights reserved.

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

Copyright © 1988-2006, Oracle. All rights reserved.

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 (|).

Copyright © 1988-2006, Oracle. All rights reserved.

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.

Copyright © 1988-2006, Oracle. All rights reserved.

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.

Copyright © 1988-2006, Oracle. All rights reserved.

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.

Copyright © 1988-2006, Oracle. All rights reserved.

Copyright © 1988-2006, Oracle. All rights reserved.

PeopleSoft Enterprise Human Resources Administer Workforce Preface

This preface discusses:

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

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

PeopleSoft Products

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

PeopleSoft Enterprise HRMS Application Fundamentals

The *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce* provides you with implementation and processing information for your PeopleSoft Human Resources Administer Workforce system.

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft HRMS product line. No matter which PeopleSoft HRMS products you are implementing, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

See Also

PeopleSoft Enterprise HRMS 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.

Copyright © 1988-2006, Oracle. All rights reserved.

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

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

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

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

Copyright © 1988-2006, Oracle. All rights reserved.

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

Copyright © 1988-2006, Oracle. All rights reserved.

Copyright © 1988-2006, Oracle. All rights reserved.

CHAPTER 1

Getting Started with Administer Workforce

This chapter discusses:

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

Human Resources Administer Workforce Overview

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

The Administer Workforce business process includes five basic steps:

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

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

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

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

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

3. Entering additional data into the record.

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

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

Copyright © 1988-2006, Oracle. All rights reserved.

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

4. Updating the record.

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

5. Viewing and reporting on worker data.

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

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Labor Administration, "Getting Started with Manage Labor Administration"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Compensation and Budgeting, "Understanding Base Compensation and Budgeting"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements

Human Resources Administer Workforce Business Processes

PeopleSoft Enterprise Human Resources Administer Workforce provides these business processes:

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

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

 Copyright © 1988-2006, Oracle. All rights reserved.

Human Resources Administer Workforce Integrations

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

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

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

Human Resources Administer Workforce Implementation

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

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

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

Component	Component Interface	References
CHKLST_ITEM_TBL	CI_CHKLST_ITEM_TBL	See Chapter 2, "Setting Up the Administer Workforce Business Process," Creating Checklists, page 38.
CNT_CLAUSE_TABLE	CNT_CLAUSE_TABLE	See Chapter 8, "Entering Additional Data in Human Resources Records," Pages Used to Track Workforce Contracts, page 286.
SALARY_PLAN_TABLE	SALARY_PLAN	See Chapter 6, "Increasing the Workforce," Common Elements Used in this Section, page 146.

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

Copyright © 1988-2006, Oracle. All rights reserved.

Copyright © 1988-2006, Oracle. All rights reserved.

CHAPTER 2

Setting Up the Administer Workforce Business Process

This chapter discusses how to:

- Define personnel actions and reasons.
- (USF) Define award actions.
- Set up template–based hire templates.
- Define employee identification.
- Set up military rank information.
- Define additional employment data.
- Create checklists.
- Set up workforce contracts.

Defining Personnel Actions and Reasons

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

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

- Define personnel actions.
- Define personnel action reasons.

Understanding Personnel Action Reasons

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

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

Copyright © 1988-2006, Oracle. All rights reserved.

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

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

Positions and Action Reasons

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

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

Global Assignments and Action Reasons

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

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

 Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Define Personnel Actions and Personnel Action Reasons

Page Name	Object Name	Navigation	Usage
Actions	ACTION_TBL_GBL	Set Up HRMS, Product Related, Workforce Administration, Actions, Actions	Define or review an action code and its values
Reason Summary	ACTION_TBL2	Set Up HRMS, Product Related, Workforce Administration, Actions, Reason Summary	Display the list of reasons for a specific action code
FPS Action	FPMACTION_PNL2	Set Up HRMS, Product Related, Workforce Administration, Actions, FPS Action	(French Public Sector). This page is displayed if you have French Public Sector selected on the Installation table. Use this page to assign the FPS components that can use the action code. This page is discussed in the *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage French Public Sector.* See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage French Public Sector*, "Setting Up French Public Sector Tables," Setting Up Actions.
Action Reason	ACTION_REASON_TBL	Set Up HRMS, Product Related, Workforce Administration, Action Reasons	Define or modify personnel action reasons.
Action Reason Table	RUN_PER710	Set Up HRMS, Product Related, Workforce Administration, Action Reason Report	Run the Action Reason Table report (PER710). This report lists the reason codes for each personnel action code and arranges them alphabetically by action.

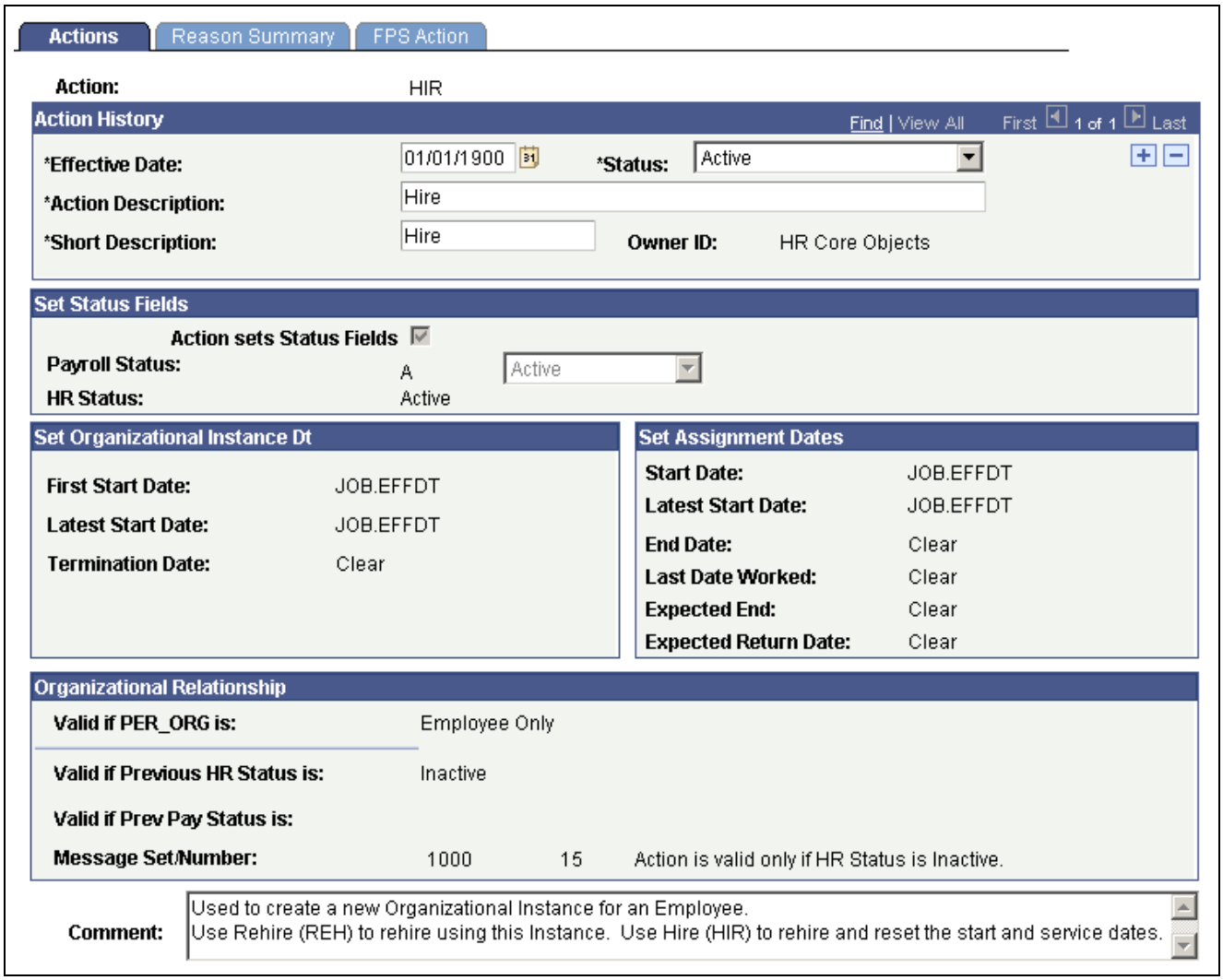
See Also

Chapter 8, "Entering Additional Data in Human Resources Records," Entering Temporary Assignments, page 295

Defining Personnel Actions

Access the Actions page.

Copyright © 1988-2006, Oracle. All rights reserved.



Actions page

Set Status Fields

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

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

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

Set Organizational Instance Dt (Set Organizational Instance Date)

First Start Date and **Latest Start Date** Select the action table value to use when this action causes the job record for a person to be updated. The First Start Date is the first date that this instance is active for a person receiving this action. For example, in an employee

 Copyright © 1988-2006, Oracle. All rights reserved.

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

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

Set Assignment Dates

Start Date Select the action table value used to determine how to set the date on which an individual assignment starts. The Hire (HIR), Add Contingent Worker (ADD), and Add Person of Interest (POI) actions, as well as the Additional Job (ADL) and Assignment (ASG) actions, set this value

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

Latest Start Date Select the action table value used to determine how to set the date on which an individual assignment is restarted. The Rehire (REH) and Renewal (RNW) actions, as well as all the actions that set the start date, set this value.

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

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

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

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

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

Organizational Relationship

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

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

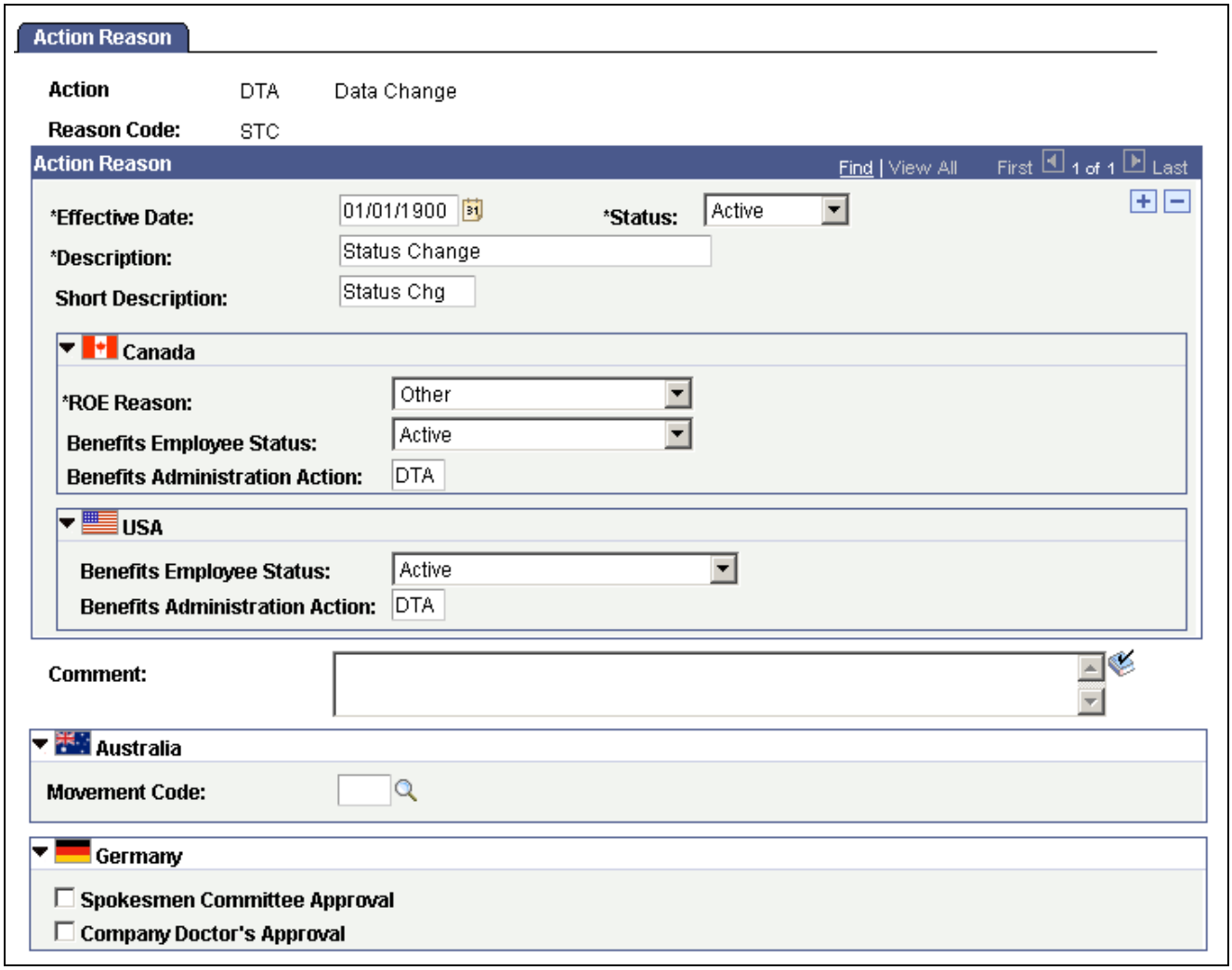
Valid if Prev Pay Status is (Valid if Previous Pay Status is): Indicate that this action is only valid if the job assignment is in the selected status. For example, a return from leave action can only be entered if the previous pay status in a Leave status. The values are: *P/L – Any Leave, P/L – Disability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

Copyright © 1988-2006, Oracle. All rights reserved.

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

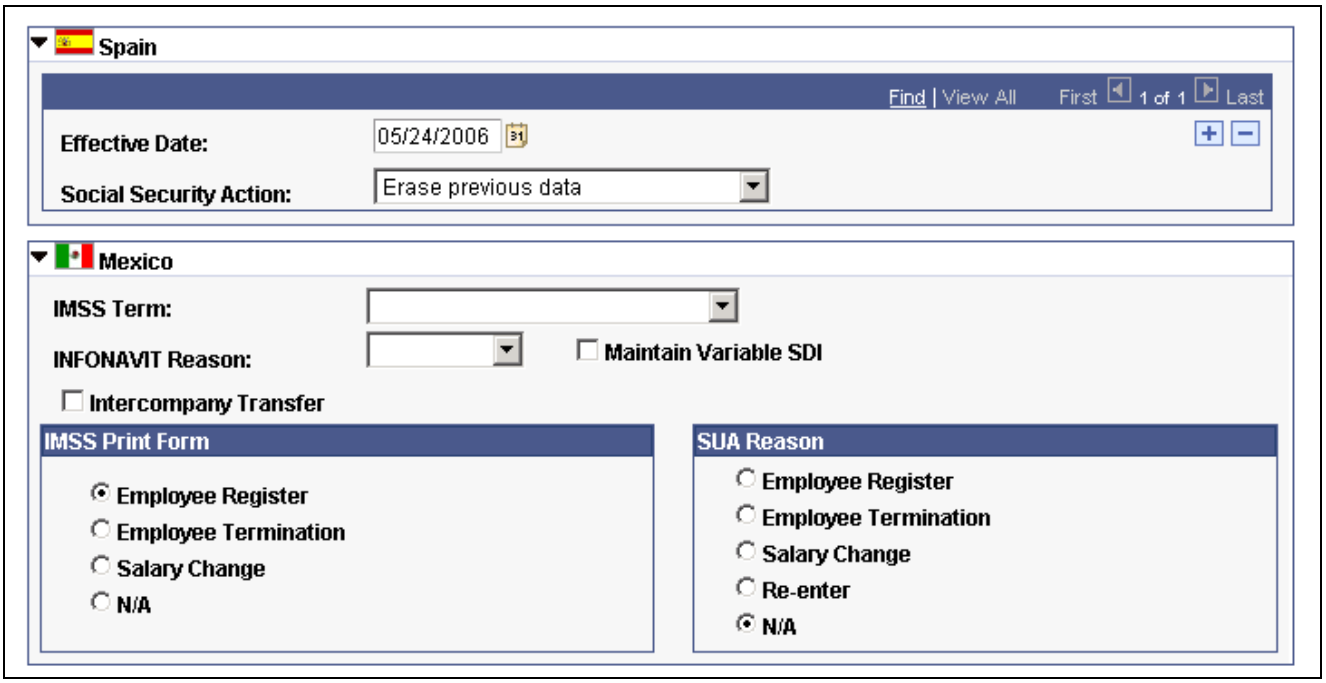
Defining Personnel Action Reasons

Access the Action Reason page.



Action Reason page (1 of 2)

Copyright © 1988-2006, Oracle. All rights reserved.



Action Reason page (2 of 2)

(CAN) Canada

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

Benefits Employee Status — Select the status associated with this action.

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

(USA) United States

Benefits Employee Status — Select the status associated with this action.

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

(AUS) Australia

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

Copyright © 1988-2006, Oracle. All rights reserved.

(DEU) Germany

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

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

(ESP) Spain

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

(MEX) Mexico

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

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

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

Maintain Variable SDI Select this check box to maintain variable SDI.

Intercompany Transfer Select this check box to indicate that the action and reason code combination is valid for processing of inter-company transfers in Global Payroll for Mexico. The Inter-Company Transfer Application Engine process (GPMX_INTERC) triggers for processing only the action and reason code combinations that you indicate by selecting this check box.

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

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

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Labor Administration, "Setting Up Labor Administration Data"

(USF) Defining Award Actions

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

This section discusses how to set up award actions.

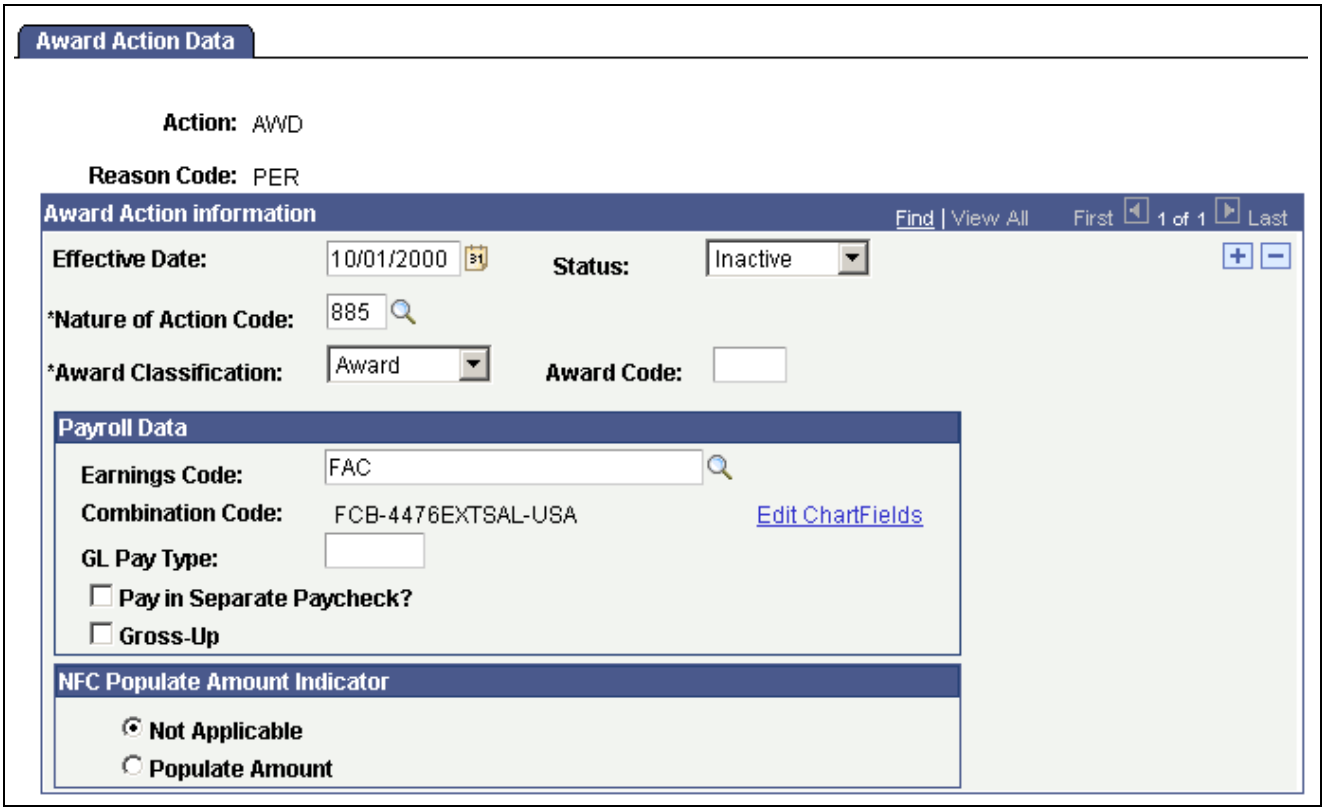
 Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Define Award Actions

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

Defining Award Codes

Access the Award Action Data page.



Award Action Data page

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

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

Award Code Enter the NFC-defined code that identifies the bonus or award. The entry in this field becomes the default value on the Award Data page for this action reason and is read only.

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

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

Copyright © 1988-2006, Oracle. All rights reserved.

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

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

NFC Populate Amount Indicator

Not Applicable or**Populate Amount** The default selection is Not Applicable.

Select Populate Amount to define a relocation or recruiting bonus that is granted to an employee though a personnel action:

- For a relocation bonus, this setting triggers the system to populate the *GVT_NFC_RELBON_AMT* NFC-specific export field with the award amount when the action code is *BON* (bonus) and the reason code is *REL* (relocation).
- For a recruiting bonus, this setting triggers the system to populate the *GVT_NFC_RECBON_AMT* NFC-specific export field with the award amount when the action code is *BON* (bonus) and the reason code is *REF* (referral).

Note. These fields are not visible to the user.

See Also

Chapter 18, "(USF) Processing Personnel Action Requests," Granting Performance Awards, page 629

Setting Up Template-Based Hire Templates

To set up template-based hire templates, use the Template Record/Field (HR_TBH_RECDEFN), Template Section (HR_TBH_SECDEFN), Template Creation (HR_TBH_CREATION), Copy Template (HR_TBH_COPY), and Template Category Table (HR_TBH_CTG_TBL) components.

This section provides an overview of setting up hire templates for template-based hires and discusses how to:

- Define template records and fields.
- Set up template sections.
- Define template section field configurations.
- Define hire template categories.
- Create a hire template.
- Configure a hire template.
- Set up hire template sections.
- Set up hire template person rules.
- Copy a hire template.

 Copyright © 1988-2006, Oracle. All rights reserved.

Understanding Template-Based Hires

Template-based hiring is a simplified and streamlined approach to completing the hiring process. Hiring templates are created and configured by a Template Administrator, someone who is very familiar with the hiring process used by your organization. After the Template Administrator has created and tested templates, they can be used by line managers or HR (Human Resources) representatives, based on the security rules that you establish.

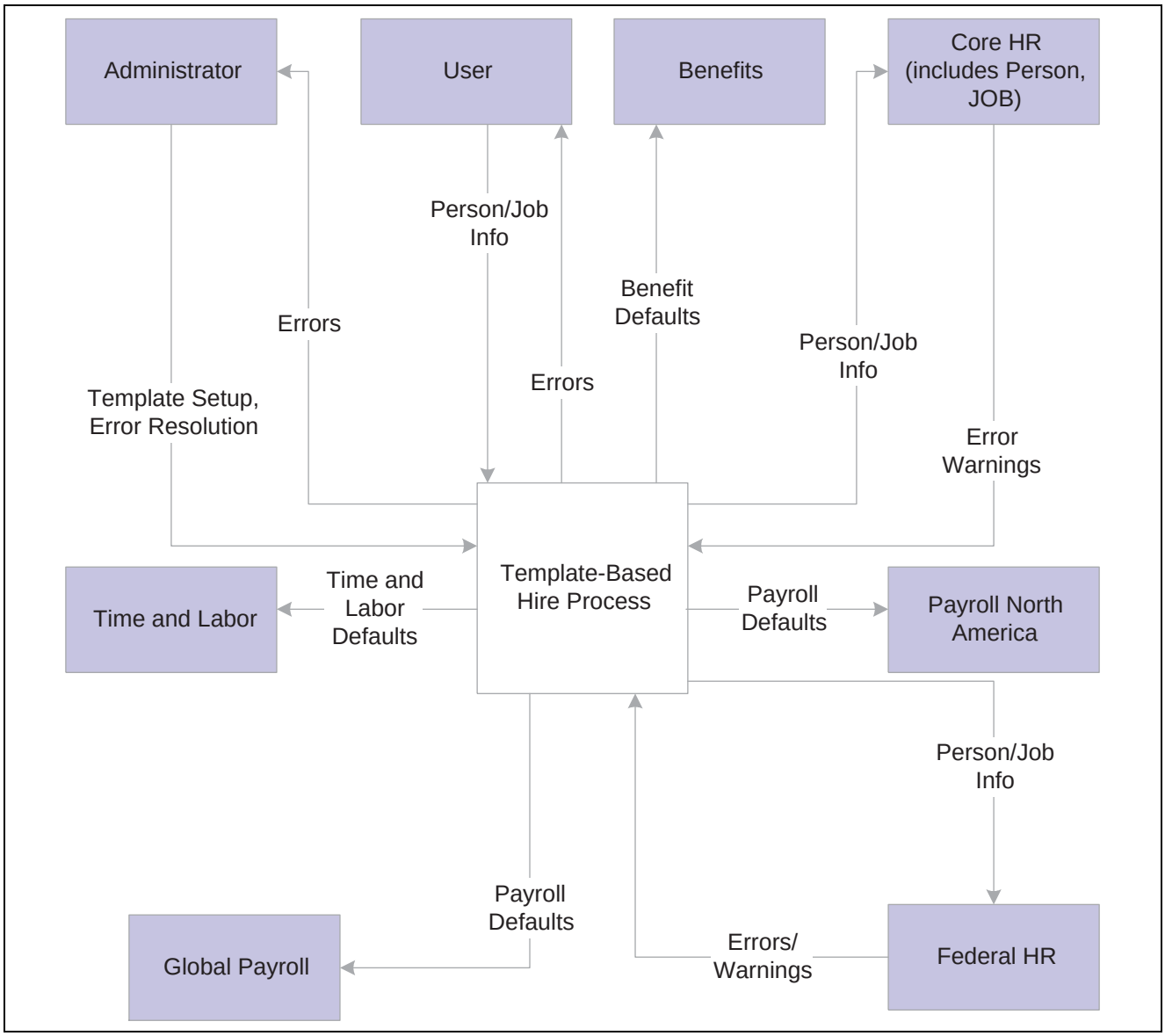
The Template Administrator determines the following aspects of each hiring template:

- The sections, or logical groupings of fields, that are included in a template, and their sequence.
- The sequence of fields within a section.
- Default values for fields.
- Hidden fields.
- Display-only fields.
- If data entered by the end user can be directly submitted for processing or must be reviewed by an HR Administrator.

The Template Administrator can test a template by performing a mock hire without actually hiring a person into the system.

This diagram shows the integration between the Template–based Hire process and other products.

Copyright © 1988-2006, Oracle. All rights reserved.



Template - based Hire Process Flow Diagram

Template-Based Hire Template Security

Security for setting up template-based hire components is implemented using PeopleTools permission lists and roles. This table lists the role, permission list and components:

Role	Permission List	Components
HR Template Setup	HCCPHR3321	HR_TBH_RECDEFN HR_TBH_SECDEFN

Note. The Template Setup components have no row-level security.

Security for using the template–based hire templates is implemented using the existing Human Capital Management and Campus Solutions row– level security. Template-Based Hire uses the following fields for security: Template ID, Organizational Relationship (Employee or Contingent Worker) Country, and Category.

Copyright © 1988-2006, Oracle. All rights reserved.

See Chapter 6, "Increasing the Workforce," Understanding Template-Based Hires, page 209.

Common Elements Used in this Section

Hiring template (or template) A pre-configured template that enables end users enter a subset of the data required for a hire. Other data is pre-entered by the Template Administrator during the template creation process.

End user For the template-based hire process, the end user is typically a line manager or HR (Human Resources) representative in the field. This person is usually not familiar with the details of the hiring process. Whenever complex issues arise, the process is handed over to a centralized HR Administrator.

HR Administrator The HR Administrator is somebody who knows the hiring process very well and can easily deal with any level of complexity. This person reviews the data entered by end users and takes over the hiring process whenever errors occur or issues arise.

Template Administrator The person in your organization who knows the hiring process very well (may be an HR Administrator). The person assigned this role sets up and maintains hiring templates to be made available to end users.

Implementer For the template-based hire process, the implementer is typically an IT (Information Technology) specialist who works closely with the HR Administrator and Template Administrator to review the delivered template records/fields and sections and modifies them, if necessary.

Template section (or section) The fields available for the templates will be grouped into sections. For example, the Work Location section will include the following fields (all on the Job record): Regulatory Region, Company, Business Unit, Department, Department Entry Date, Location, Establishment ID. Sections are the building blocks for creating templates, not the individual records/fields. PeopleSofl delivers these sections as system data, but the implementer can modify them, delete them, or add new sections.

Template page (or pages) The dynamically generated data entry page visible to the end user, consisting of one or more template sections. The Template Administrator decides whether the sections are displayed in one long page or divided into smaller pages.

Template category The Template Administrator assigns each template to a category. The category provides row-level security for a template and can be used to group templates. A category may represent a specific department, location, business unit, region, and so forth.

Auto-update flag Determines whether data entered by the end user can be directly submitted for processing (Auto-update is turned on) or will need to be reviewed by an HR administrator (Auto-Update is turned off). This flag is set by the Template Administrator (the end user is not able to change it).

Search Match Parameters The Template Administrator can associate a search match rule with a template to determine if the person to be hired already exists in the system. This search is done in the background and the results are displayed using the Search Match Results page.

Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Set Up Template-Based Hire Templates

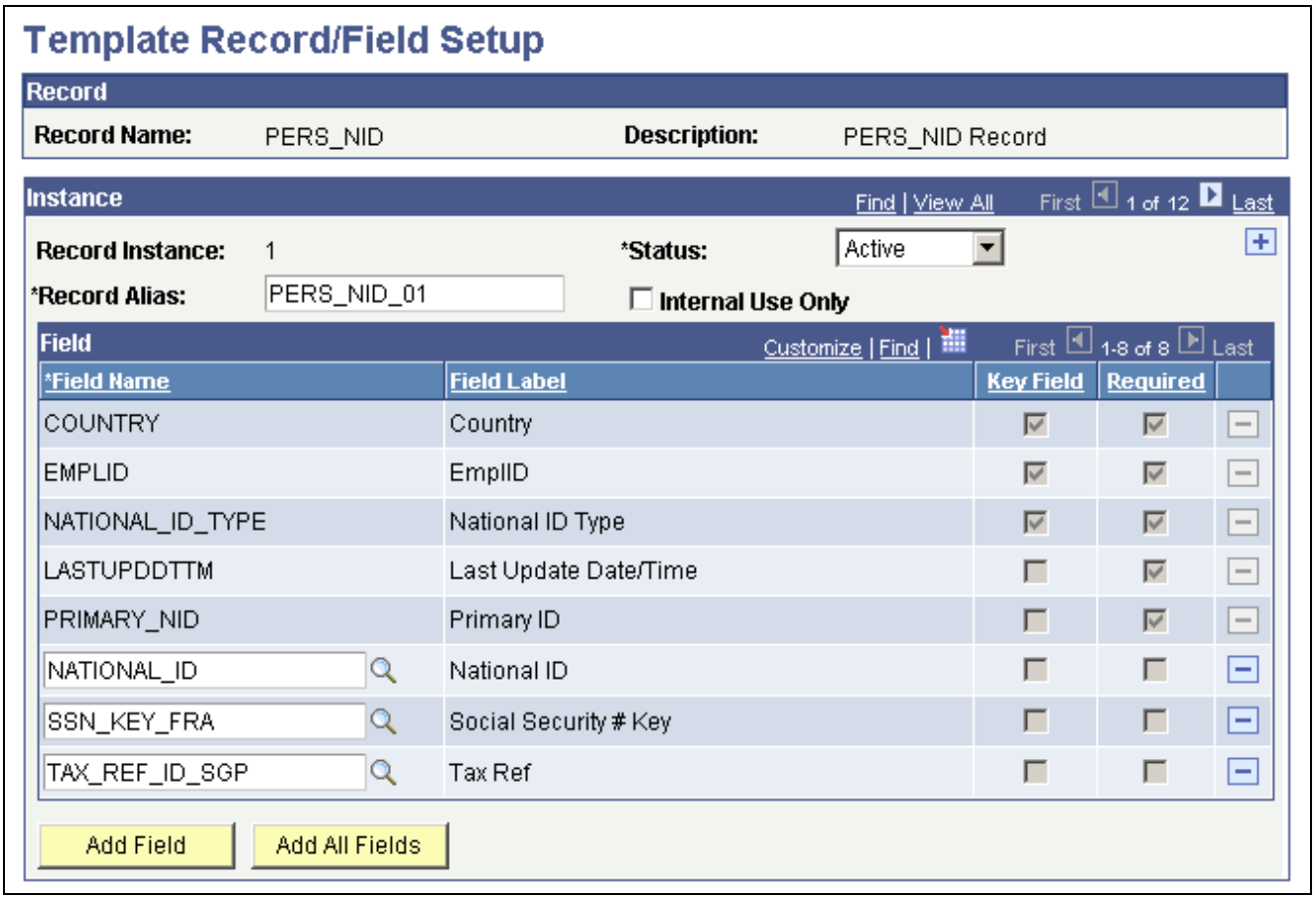
Page Name	Object Name	Navigation	Usage
Template Record/Field Setup	HR_TBH_RECDEFN	Set Up HRMS, Product Related , Workforce Administration , Template-Based Hire, Template Record/Field, Template Record/Field Setup	Set up and maintain the records and fields to be used in the Template-based Hire process. The records/fields that should be available to be included in the templates will be stored in the Template Record Setup Table (HR_TBH_RECDEFN) and Template Field Setup Table (HR_TBH_RECDTL). The Template Record Setup Table contains one row for each table currently included in the core Hire process with at least one enterable field (except for tables with multiple instances, such as phone numbers, email addresses, and so forth, where more than one row exists).
Template Section Setup	HR_TBH_SECDEFN	Set Up HRMS, Product Related, Workforce Administration, Template-Based Hire, Template Section, Template Section Setup	Identify and configure sections, and list and configure the fields contained in a section.
Template Section Field Configuration	HR_TBH_SECDTL	Click the Field Configuration link on the Template Section Setup page.	Add additional user exit information for field changes and field prompts.
Template Category Table	HR_TBH_CTG_TBL	Set Up HRMS, Product Related, Workforce Administration, Template-Based Hire, Template Category Table, Template Category Table	Set up template categories for grouping templates, and for row-level security.
Template Creation	HR_TBH_TMPL_HDR	Set Up HRMS, Product Related, Workforce Administration, Template-Based Hire, Template Creation, Template Creation	Create and modify templates.
Configuration	HR_TBH_TMPL_CFG	Set Up HRMS, Product Related, Workforce Administration, Template-Based Hire, Template Creation, Configuration	Set up general options and the Search page configuration for a template.

Copyright © 1988-2006, Oracle. All rights reserved.

Page Name	Object Name	Navigation	Usage
Sections	HR_TBH_TMPL_SEC	Set Up HRMS, Product Related, Workforce Administration, Template-Based Hire, Template Creation, Sections	Add and configure template sections.
Person Rules	HR_TBH_TMPL_PER	Set Up HRMS, Product Related, Workforce Administration, Template-Based Hire, Template Creation, Person Rules	Enable or disable Search Match for a template and define options for handling existing person data and employment instances in the database.
Copy Template	HR_TBH_COPY	Set Up HRMS, Product Related, Workforce Administration, Template-Based Hire, Copy Template	Copy and modify an existing template.

Defining Template Records and Fields

Access the Template Record/Field Setup page.



Template Record/Field Setup page

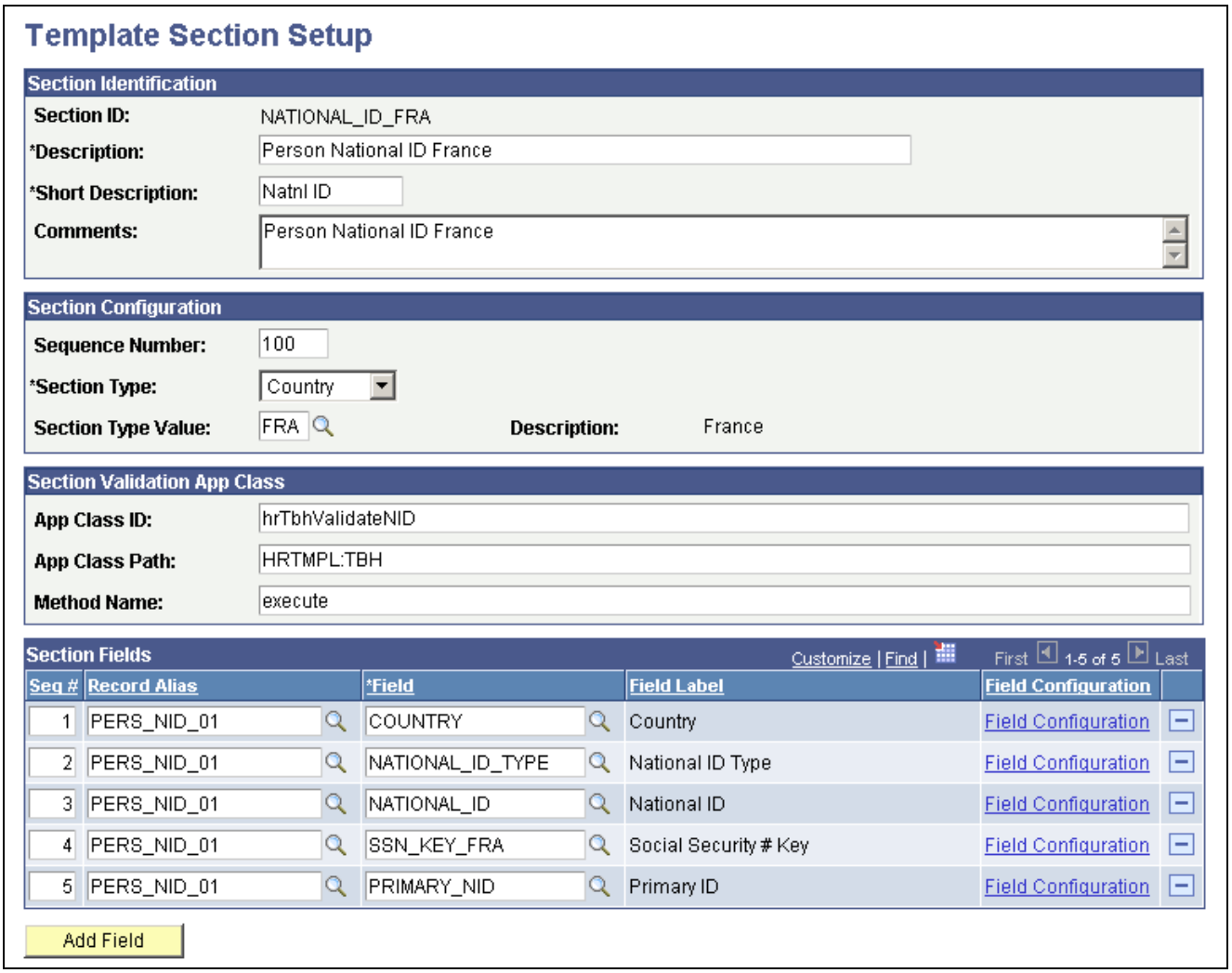
Copyright © 1988-2006, Oracle. All rights reserved.

Record Name	Name of the table to be included. (Prompted from the same field in the PeopleTools Record Definition table.)
Record Instance	Instance number of the record. Defaults to one. Used for records with more than one instance, such as phone numbers, email addresses, and so forth.
Record Name Alias	Alternative name of the table to be included. Defaults to the Record Name. This field allows the implementer to differentiate between two different instances of the same record. For example, business address (ADDRESSES_1) from mailing address (ADDRESSES_2). This is the prompt shown for the record when adding a new record/field to a section.
Internal Use Only	Select this check box to designate fields that are used in the Template-Based Hire process but are not passed to the Services/Ci.
Key Field	This check box is selected (in PeopleCode) if the field is defined as a key field at the system level (in the PeopleTools Record Field table PSRECFIELD). This field cannot be changed by the Implementer (display-only).
Required	This check box is selected by default (in PeopleCode) and is based on the PeopleTools Record Field table PSRECFIELD. This field cannot be changed by the Implementer (display-only).

Setting Up Template Sections

Access the Template Section Setup page.

 Copyright © 1988-2006, Oracle. All rights reserved.



Template Section Setup page

Sequence Number Determines the order of sections on the end user data entry page.

Section Type Specifies the type of the section. Valid values are *General*, *Country*, *Name*, *Address*, and *Federal*.

Note. (USF) U.S. Federal customers will only see National Finance Center (NFC) interface fields if the database is federalized and Payroll Interface is selected on the HR Installation table.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HRMS".

Section Type Value For Name sections, this field stores the name format code. For the Country-specific and Address sections, the appropriate country code is stored. The field is empty for Federal and General sections.

Add Field Click this button to add new rows for additional fields in the section.

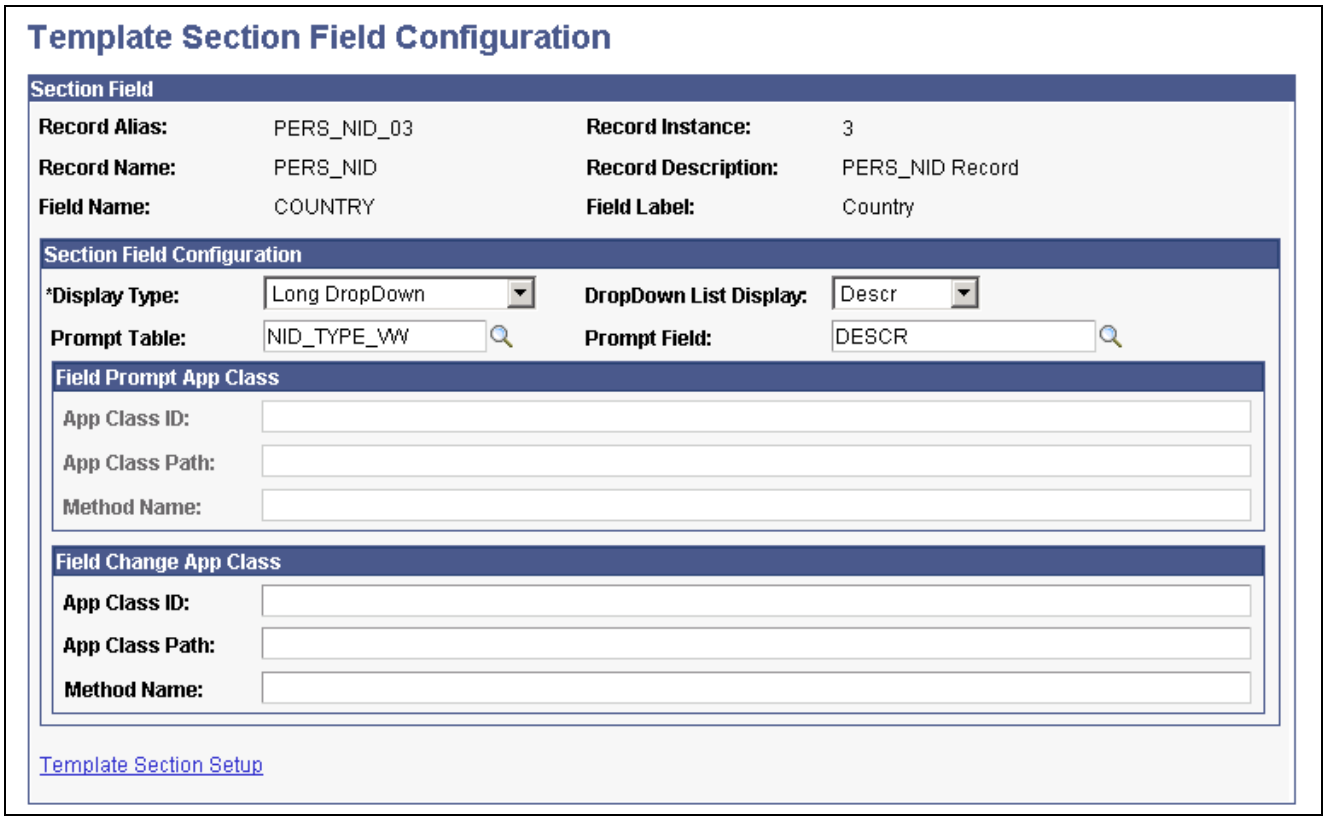
Copyright © 1988-2006, Oracle. All rights reserved.

Section Validation App Class

A user-exit is provided for each section for validation that might be required by your organization. These are implemented as application class methods routines and appear in the App Class ID, App Class Path, and Method Name fields. There are three section validation methods delivered as system data, for National Id's, Addresses and Names. .

Defining Template Section Field Configurations

Access the Template Section Field Configuration page.



Template Section Field Configuration page

Display Type, DropDown List Display, Prompt Table and **Prompt Field** Select the field types that will appear on the template to an end-user.

Defining Hire Template Categories

Access the Template Category Table page.

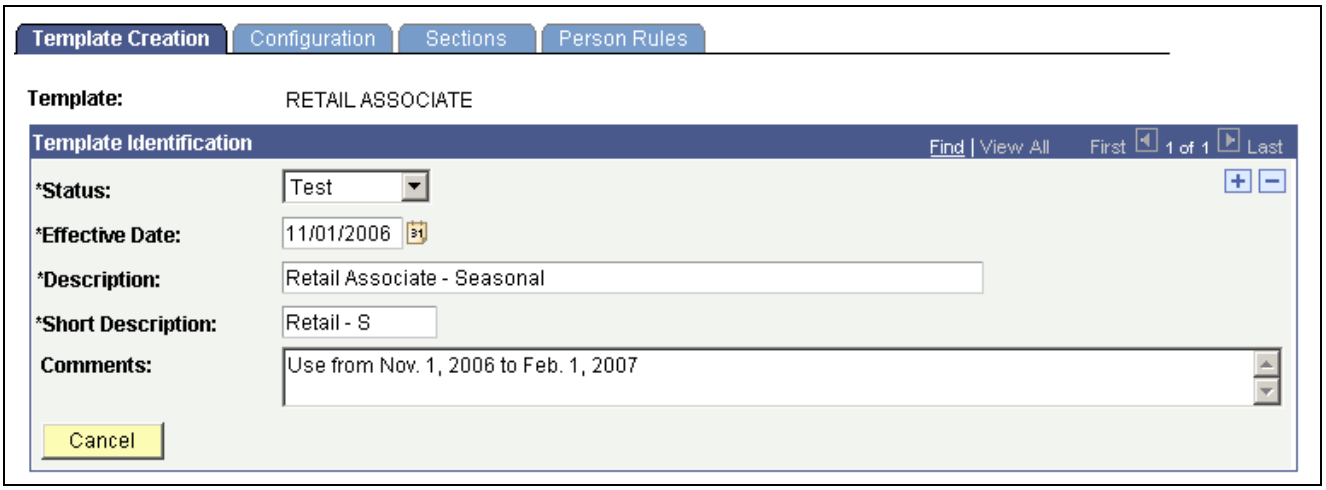
Copyright © 1988-2006, Oracle. All rights reserved.



Template Category Table page

Creating a Hire Template

Access the Template Creation page.



Template Creation page

Template The Template Administrator defines this field.

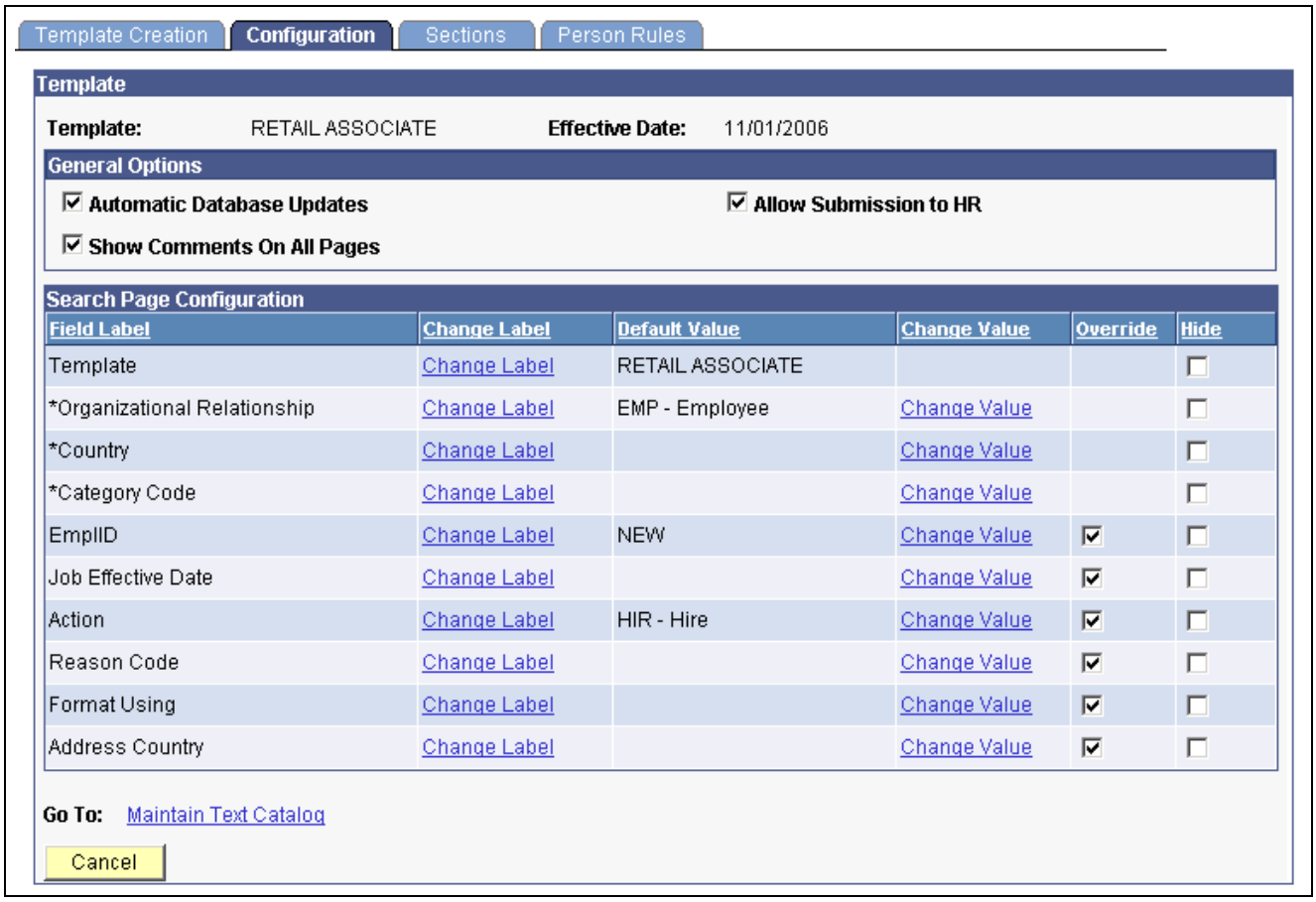
Status The default option for this field is *Test* when creating a new template. The Administrator can change the value to *Active* when it's time to be published, or *Inactive* when the template is no longer necessary.

Effective Date The default value for this field is today's date. The Administrator determines the effective date of a template.

Configuring a Hire Template

Access the Configuration page.

Copyright © 1988-2006, Oracle. All rights reserved.



Configuration page

The Template ID, Org Relationship, Country, and Category Code fields are used as part of row-level security. These fields are used to determine to which templates end-users will have access.

Automatic Database Updates

If selected, the data entered by the end user is automatically updated to the database. When the check box is cleared, data entered by the end user is sent to an HR Administrator for final processing.

Allow Submission to HR

If Automatic Database Updates is selected, the following rules apply:

- The Submit to HR button appears on the Template Based Hire page. This allows the end-user to submit incomplete data to HR without entering all the required fields (although First Name and Last Name are required).
- When the button is clicked, the hire request is sent to HR in HR Action Required status for HR to complete final processing.
- The Save and Submit button is displayed. When this button is clicked, data is automatically updated to the database (when no errors are encountered).

Organizational Relationship

The default option for this field is *Employee*. The other available option is *Contingent Worker*.

Note. Person of Interest is not an option.

Country

- The country you select impacts country defaults and what sections appear on the template.

Copyright © 1988-2006, Oracle. All rights reserved.

- (USF) The Country field default to *USA* for U.S. Federal installations.

Job Effective Date The Template Administrator usually selects the Override check box for this field and sets the default value to blank so the end-user will provide the hire date. Some business processes require a fixed effective date, such as in the case of seasonal hiring.

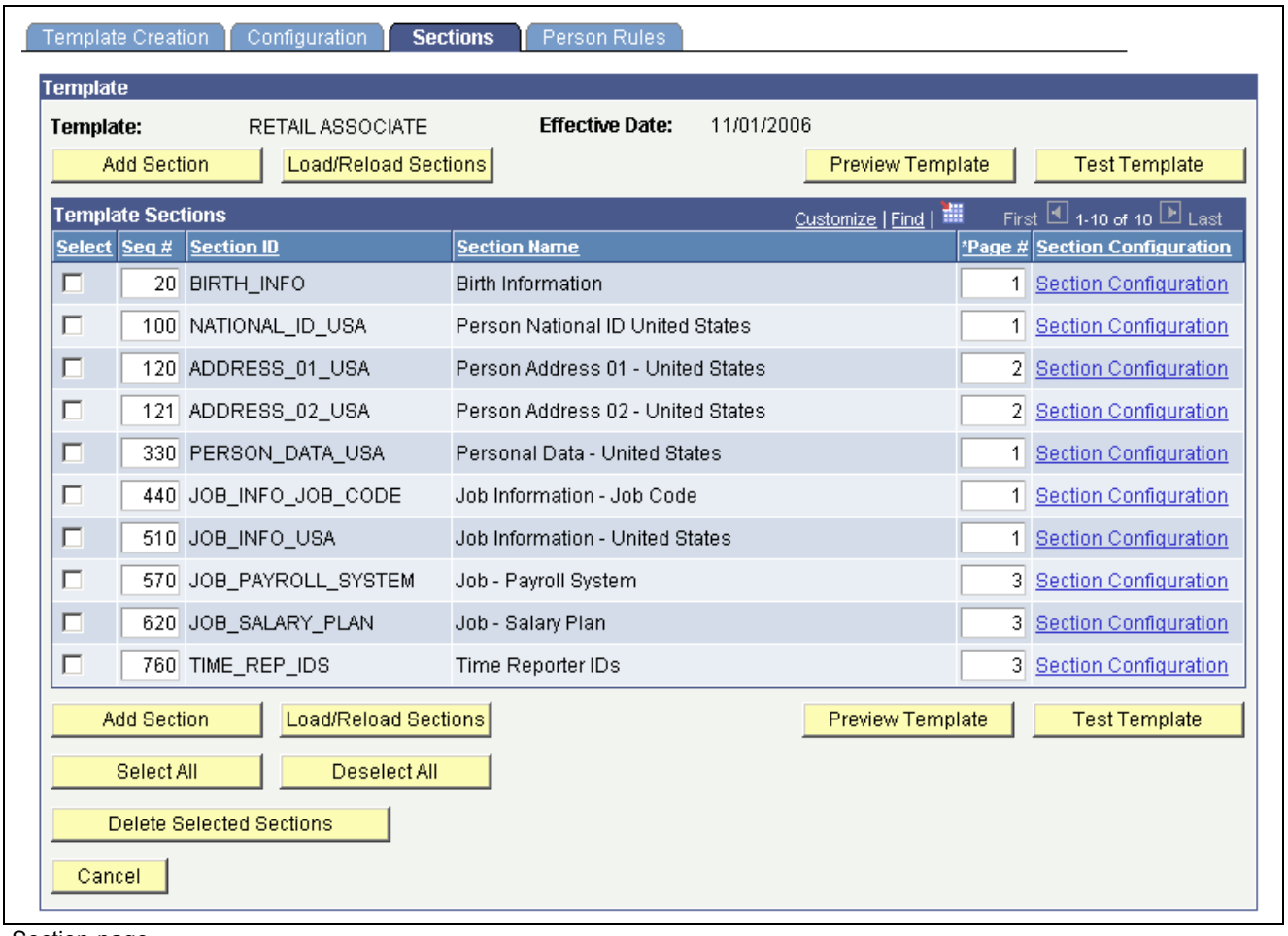
Format Using The name format that you select impacts the actual hire page. Template Administrators may choose to hide this field from the end user if they do not want the end-user to select a different name format.

Address Country The country address format that you select impacts the actual hire page. Template Administrators may choose to hide this field from the end user if they do not want the end-user to select a different address format.

Maintain Text Catalog Click this link to open the Text Catalog – Maintain page in a new browser window. Use the Text Catalog –Maintain page to change the label sections.

Setting Up Hire Template Sections

Access the Sections page.



Section page

Copyright © 1988-2006, Oracle. All rights reserved.

The Template Administrator has access to all commercial fields and U.S. Federal fields which can be entered as part of the hire process in the Personal Data and Job Data components. The administrator organizes the fields into sections, ranging from one field in a section to ten or more fields in a section, and determines which sections are hidden from the end user during the hire process for each template.

Note. If a Position Number is selected on the template definition it will not populate values from Position Management. The Administrator must hide fields that are populated by position number because they are overridden at the time the position number is loaded in Job Data and defaults are automatically entered. Here is a list of those fields (from Position Data—does not include what may also be defaulted in the JOB code):

Add Section Click this button to add a new row for a new section.

Load/Reload Sections Click this button to add all sections to the template. The system looks at the values that were entered for the Country, Format Using, Address Country, and at the U.S. Federal flag to determine which sections to load.

If a section is already present, it is not overwritten.

If the Template Administrator changes the country on a template, existing country-specfic sections are deleted and new country sections is loaded.

If the Template Administrator changes the Name Format or Address Country on a template, existing name format- and address county-specific sections are deleted and new sections are loaded.

If the U.S. Federal flag changes, all existing sections are deleted and new ones are loaded.

Preview Template Click this button to open a new browser window to preview the template. Preview mode displays each template page and the sections on those pages.

Test Template Click this button to validate if the template is set up correctly. The Template Administrator enters a person's data as an end-user would and then clicks the Test Template button. If the template is set up correctly, the Successful confirmation page appears. If the template is not set up correctly, the Error confirmation page appears with a link to view the errors that the template encountered.

Note. Testing a template does not update Personal Data and Job Data.

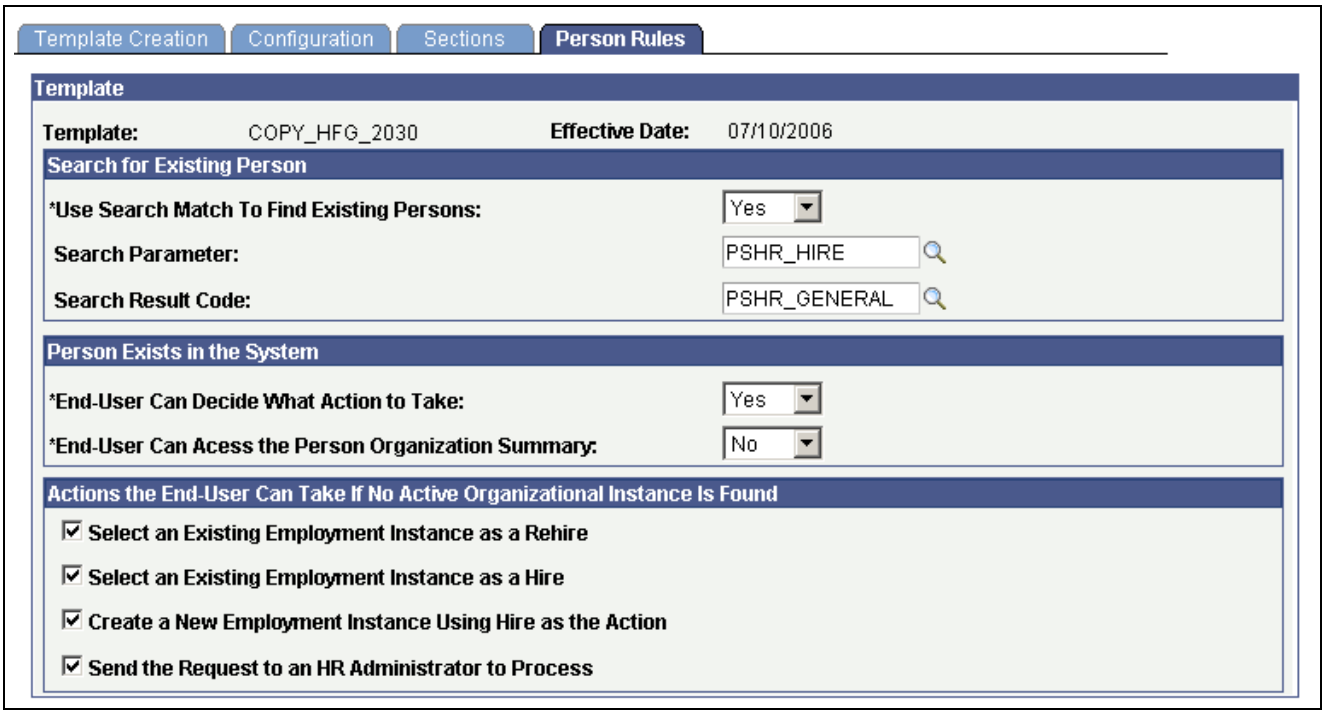
Seq # Enter a sequential number to reorder sections.

Page # Assign sections to a page number to group sections together or separate them on to different pages.

Setting Up Hire Template Person Rules

Access the Person Rules page.

 Copyright © 1988-2006, Oracle. All rights reserved.



Person Rules page

Search for Existing Person

Use these fields to enable or disable Search Match.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Working with Search/Match".

Actions the End-User Can Take If No Active Organizational Instance Is Found

Select one or more check boxes to enable functionality for the end user for the template.

Copying a Hire Template

Access the Copy Template page.



Copy Template page

Copyright © 1988-2006, Oracle. All rights reserved.

Country Changes

If you copy a country template and save it for another country, only the related country sections appear on the page. The original country sections and their defaults are hidden. For example, if a template for France (FRA) is copied and you change the country for the new template to Spain (ESP), the FRA sections are removed; the ESP sections appear, are blank, and ready for input.

Defining Employee Identification

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

This section discusses how to:

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

Pages Used to Define Employee Identification

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

Defining Visas and Work Permits

Access the Visa/Permit Table page.

Copyright © 1988-2006, Oracle. All rights reserved.



Visa/Permit Table page

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

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

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

Setting Up Military Data

To set up military data tables, use the Service Components (MIL_SVC_COMPONENT), Component Categories (MIL_CMP_CAT_DEFN), Military Service (MIL_SERVICE_DEFN), Worn Rank Types (MIL_WRN_TYPE_DEFN), and Skill Grades (MIL_SKL_GRD_DEFN) components.

This section provides an overview of military ranking structure and discusses how to:

- Establish military service details.
- Define service ranks.
- Associate grades with ranks.

Copyright © 1988-2006, Oracle. All rights reserved.

Understanding Military Ranking Structure

In a military organization, rank defines the hierarchy and organization of its personnel and represents seniority and command. Rank is also an attribute used to drive pay and is used in force planning, reporting, movement, and assignments. Once military functionality is enabled on the Installation table and the military tables set up in PeopleSoft Human Resources system, you can associate military service and rank with positions or track the movement of service members between active (or inactive) duty, reserve call-ups, and so forth in Job Data.

PeopleSoft Human Resources provides the Military Service table to track the various services, ranks, and hierarchical structures for a country (for example, the U.S. has four services that have different ranks). Within this table, military organization's can use sequence numbers and the National Atlantic Treaty Organization (NATO) rank codes to define a service structure's order for ranks. Rank structure is also broken down according to the following rank categories: Officers (OF), Other Ranks (OR), and Warrant Officers (WO). Within each of the three rank categories, ranks are graded numerically, as shown in this table:

Rank Category	Numerical Grade	Details
Officers	OF-01 to OF-10	
Other Ranks	OR–01 to OR–09	Other Ranks may include a sub-categorization of Non-Commissioned Officer or Enlisted personnel. These sub-categorizations vary by country. For NATO purposes, rank grades OR-05 to OR-09 inclusive are considered to be Non-Commissioned Officers.
Warrant Officers	1 to 4	Typically represent a hierarchy between non-commissioned officers and commissioned officers.

Military organizations use the general salary plan tables to set up the general salary structures, for example Officers, Warrant Officers, Enlisted salary and other structures. Once salary plans and grades are established in the system, an organization can assign different salary grades to a rank for the purpose of calculating pay and seniority. When an individual is assigned a rank in Job Data, only those salary grades associated with their rank or worn rank are eligible pay structures.

PeopleSoft delivers the *RANK* content type to integrate a person's job with the Manage Profile feature. A profile integration update service, when set up accordingly in the Event Manager, updates a person's profile in Manage Profiles from Job Data when there's a rank change.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles*, "Setting Up Profile Management".

 Copyright © 1988-2006, Oracle. All rights reserved.

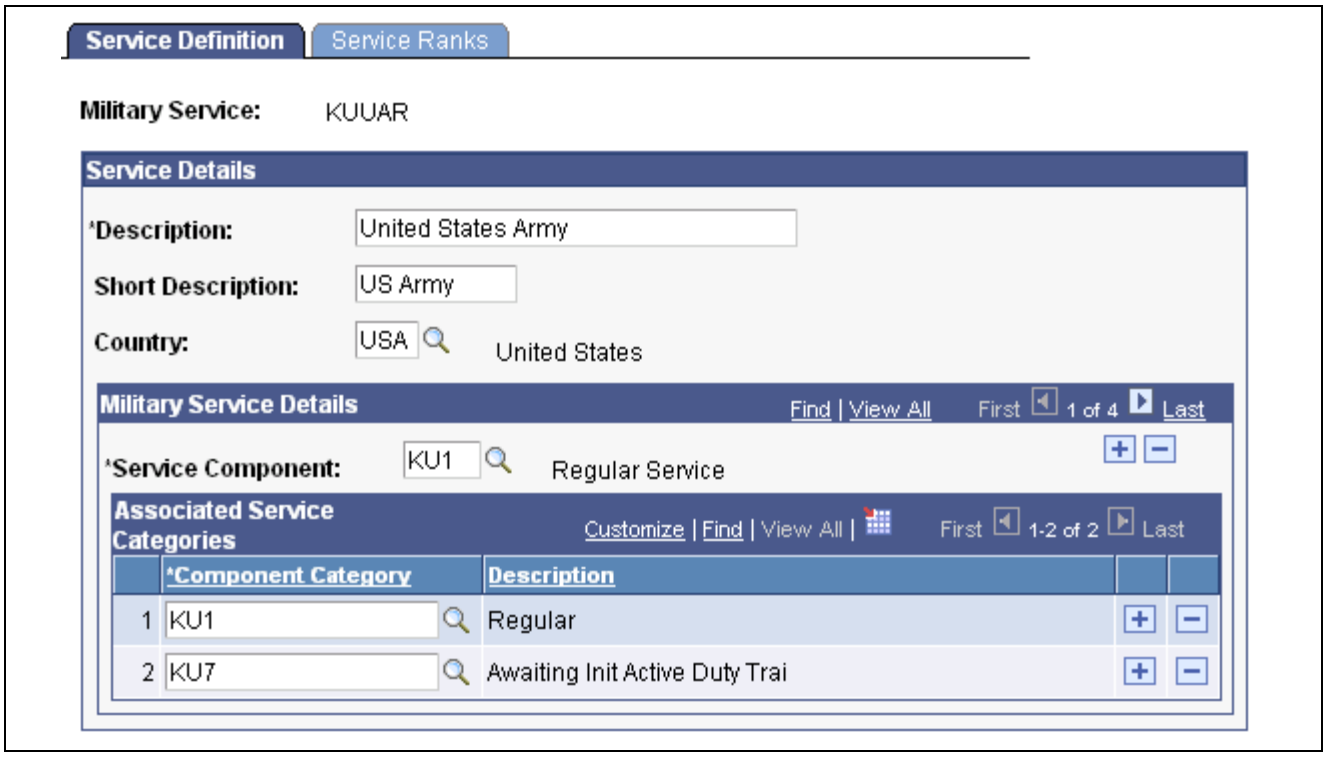
Pages Used to Set Up Military Data

Page Name	Object Name	Navigation	Usage
Service Components	MIL_SVC_CMP_DEFN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Service Components, Service Components	Enter service types (Regular, Active Reserve, Inactive Reserve or Emergency Reserve, or Guard, for example).
Component Categories	MIL_CMP_CAT_DEFN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Component Categories, Component Categories	Create categories that further define military service components (Supplemental, Weekend Training, or Permanent, for example)
Service Definition	MIL_SERVICE_DEFN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Military Service, Service Definition	Associate service components and categories to a military service and country.
Service Ranks	MIL_SERVICE_RANKS	Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Military Service, Service Ranks	Define ranks that you will later associate with military service members. Identify the hierarchy and structure of the ranks within a specified military service.
Grades Associated with Ranks	MIL_RANK_GRADE_SEC	Select the Salary Grade link on the Service Ranks page.	Select the salary plans and grades that fit the pay attributes of a rank.
Worn Rank Types	MIL_WRN_TYPE_DEFN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Worn Rank Types, Worn Rank Types	Identify rank insignias that a service member is allowed to wear on his uniform while serving in a particular post.
Skill Grades	MIL_SKL_GRD_DEFN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Skill Grades, Skill Grades	Create skill grade levels for which a service member can be evaluated. Skill grades, along with ranks, may be components of someone's pay and relevant in some payroll processing systems.

Defining Military Service and Rank Structure

Access the Service Definition page.

Copyright © 1988-2006, Oracle. All rights reserved.



Service Definition page

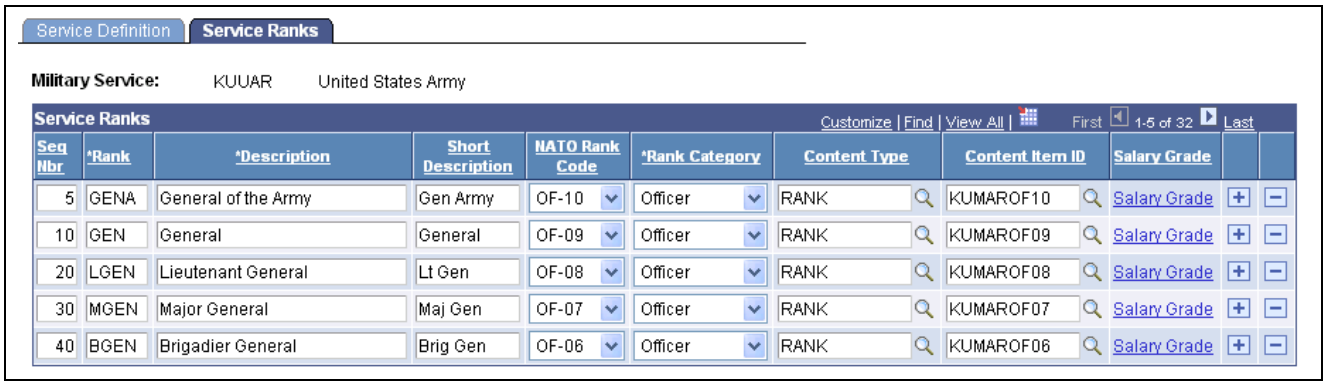
Country Enter the country to which this military service applies.

Service Component Select one or multiple service components related to this military service. When a user associates a military service with a position or military service member, only those service components associated with that military service are available to the user.

Component Category Associate service categories to service components. When a user associates a service component with a military service member, only those component categories associated with that service component are available to the user.

Defining Service Ranks

Access the Service Ranks page.



Service Ranks page

Copyright © 1988-2006, Oracle. All rights reserved.

Seq Nbr (sequence number) Specify the overall rank sort order to specify the military's hierarchical structure. This field enables users to sort rank codes where these service ranks have the same NATO ranks, such as the OF-1 (1st and 2nd Lieutenant ranks). This field also enables you to specify individual rank order sequences for military services that are not part of the NATO structure and hierarchy.

Rank Define rank code designations specific to this military service.

NATO Rank Code Select the NATO code associated with this rank, if available. Valid values are provided using translate values. This field is optional since it does not apply to all militaries, such as the US Warrant Officer rank categories.

The system displays a warning message upon saving if the NATO rank code is blank and the Military Rank Category is *Officer* or *Other Ranks*.

Rank Category Categorizing ranks based on NATO's definitions. Valid values are *Officer, Other Ranks,* and *Warrant Officer.*

Content Type Enter the content type that defines the rank (for example, rank, competency, degree). The PeopleSoft system delivers the content type *RANK* to record ranks.

When a military service member's rank is updated in Job Data the system will update that person's profile, if an organization has set up the Event Manager accordingly.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles*, "Setting Up the Content Catalog".

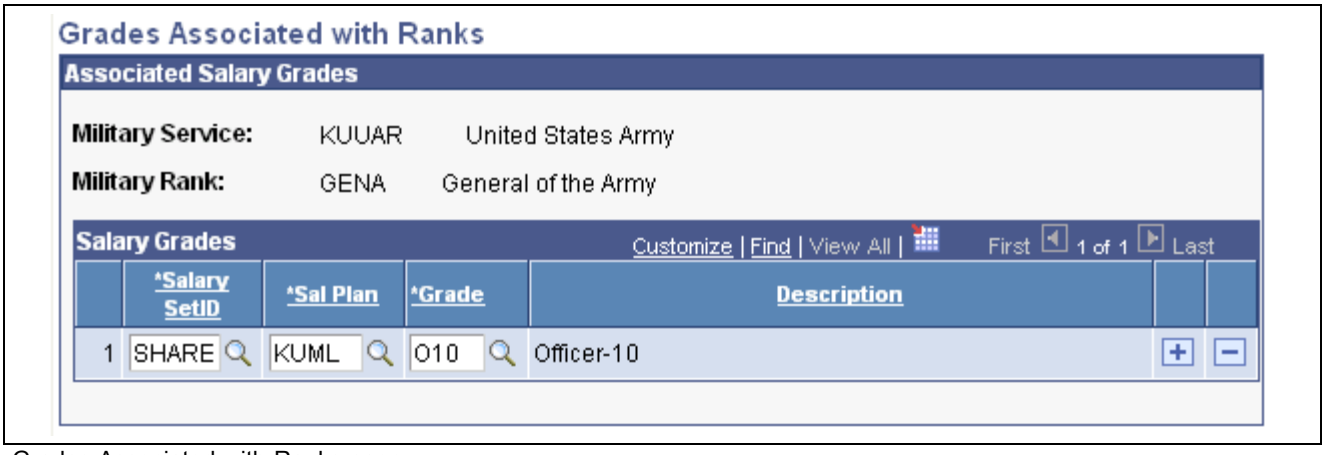
Content Item ID Select a content item to that further defines the content type. The system uses this information to manage a persons job profile.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles*, "Setting Up the Content Catalog".

Salary Grade Click to access the Grades Associated with Ranks page and define which salary plans and grades fit the pay attributes of this respective rank code.

Associating Grades with Ranks

Access the Grades Associated with Ranks page.



Grades Associated with Ranks page

Copyright © 1988-2006, Oracle. All rights reserved.

When a rank is associated with a service member in Job Data, the system returns only those salary plans and grades that are applicable to the rank, as defined on this page.

Defining Additional Employment Setup Data

To set up the additional employment setup data tables, use the Ethnic Groups (ETHNIC_GROUP_GBL), Non-Employee Provider (NEE_PROVIDER_TBL), Religions (RELIGION_TBL_GBL), Supervisor Levels (SUPVSR_LVL_TBL), Temporary Duties (TEMP_DUTIES_TBL), Volunteer Organizations (VOLUNTEER_ORG_TBL), and Employee Class (EMPL_CLASS_TABLE) components.

This section provides and overview of supervisor levels and discusses how to define ethnic groups.

Understanding Supervisor Levels

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

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

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

Table 1: Supervisor Levels

Supervisor Level	Description
01	Director
02	Senior Manager

Table 2: Departments

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

 Copyright © 1988-2006, Oracle. All rights reserved.

Table 3: Position, Supervisor Level, and Departments

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

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

Pages Used to Define Additional Employment Data

Page Name	Object Name	Navigation	Usage
Ethnic Groups	ETHNIC_GROUP_TBL	Set Up HRMS, Product Related, Workforce Administration, Ethnic Groups, Ethnic Groups	Define ethnic groups. Regulations in some countries require ethnic group tracking by employers. The system tables contain predetermined values for defining ethnic groups and religions. You can add or edit values and descriptions.
Provider Info (provider information)	NEE_PROVIDER_TBL	Set Up HRMS, Product Related, Workforce Administration, Non-Employee Provider, Provider Info	Define the provider, agency, or employer of a contingent worker. Link this information to a worker on the Employment Information page or Contract Data page.
Religions	RELIGION_TBL	Set Up HRMS, Product Related, Workforce Administration, Religions, Religions	Define religions.

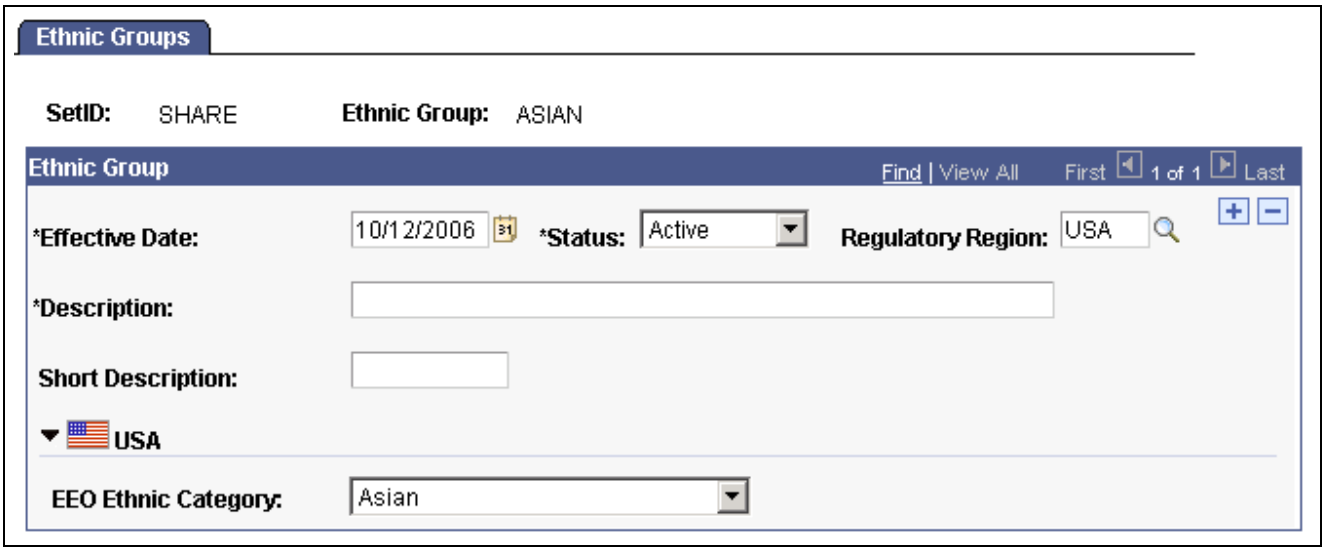
Copyright © 1988-2006, Oracle. All rights reserved.

Page Name	Object Name	Navigation	Usage
Supvsr Lvl Tbl (supervisor level table)	SUPVSR_LVL_TBL	Set Up HRMS, Product Related, Workforce Administration, Supervisor Levels, Supvsr Lvl Tbl	Add and modify supervisor level data.
Duties Type	TEMP_DUTIES_TBL	Set Up HRMS, Product Related, Workforce Administration, Temporary Duties, Duties Type	Define or modify duty types for temporary assignments. This field only appears on the Job Code page of Job Data when the action is Temporary Assignment (TAS) and the Installation table has Auto Job Suspend selected. The value can indicate what type of duties are included in the assignment. See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements*, "(GBR) Meeting Regulatory Requirements for the United Kingdom," Running the Northern Ireland Report.
Volunteer Organization Table	VOLUNTEER_ORG_TABL	Set Up HRMS, Product Related, Workforce Administration, Volunteer Organizations, Volunteer Organization Table	Add volunteer organization data that your company recognizes or sponsors.
Empl Class Table (employee class table)	EMPL_CLASS_TABLE	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Employee Class, Empl Class Table	Set up employee classes to further categorize your workforce. Employee classes are assigned on the Job Data - Job Information page (JOB_DATA_JOBCODE). **Note.** (GBR) The Northern Ireland Fair Employment Monitoring report (UKNI001) uses the employee class to determine the classification for workers. If your organization submits this report, you must use the required employee classes for the report to work correctly.

Defining Ethnic Groups

Access the Ethnic Groups page.

Copyright © 1988-2006, Oracle. All rights reserved.



Ethnic Groups page

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

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

Values include:

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

Setting Up Security Clearance Types

To set up the security clearance types, use the Security Clearance Type (SEC_CLR_TYP_TBL) component.

This section discusses how to set up security clearance types.

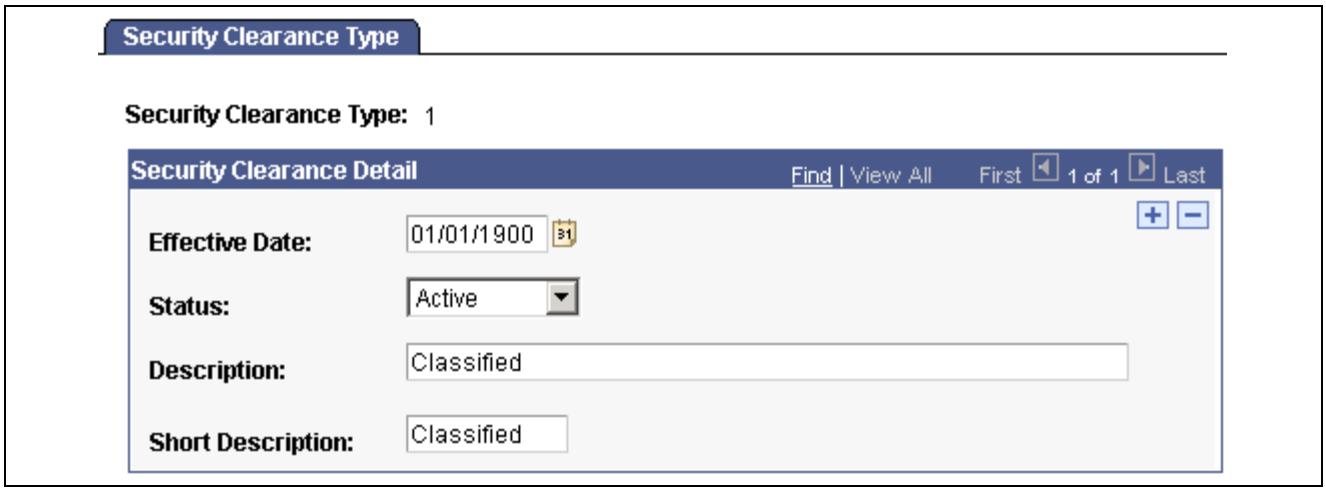
Copyright © 1988-2006, Oracle. All rights reserved.

Page Used to Set Up Security Clearance Types

Page Name	Object Name	Navigation	Usage
Security Clearance Type	SEC_CLR_TYP_TBL	Set Up HRMS, Product Related, Workforce Administration, Security Clearance Type	Set up security clearance types.

Defining Security Clearance Types

Access the Security Clearance Type page.



Security Clearance Type page

Effective Date The date the security clearance type becomes effective.

Status Provide the status of the security clearance. Valid values are *Active* or *Inactive.*

Description Provide the long description of the security clearance type.

Short Description Provide the short description of the security clearance type.

Creating Checklists

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

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

Understanding Checklists

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

Copyright © 1988-2006, Oracle. All rights reserved.

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

To make a checklist:

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

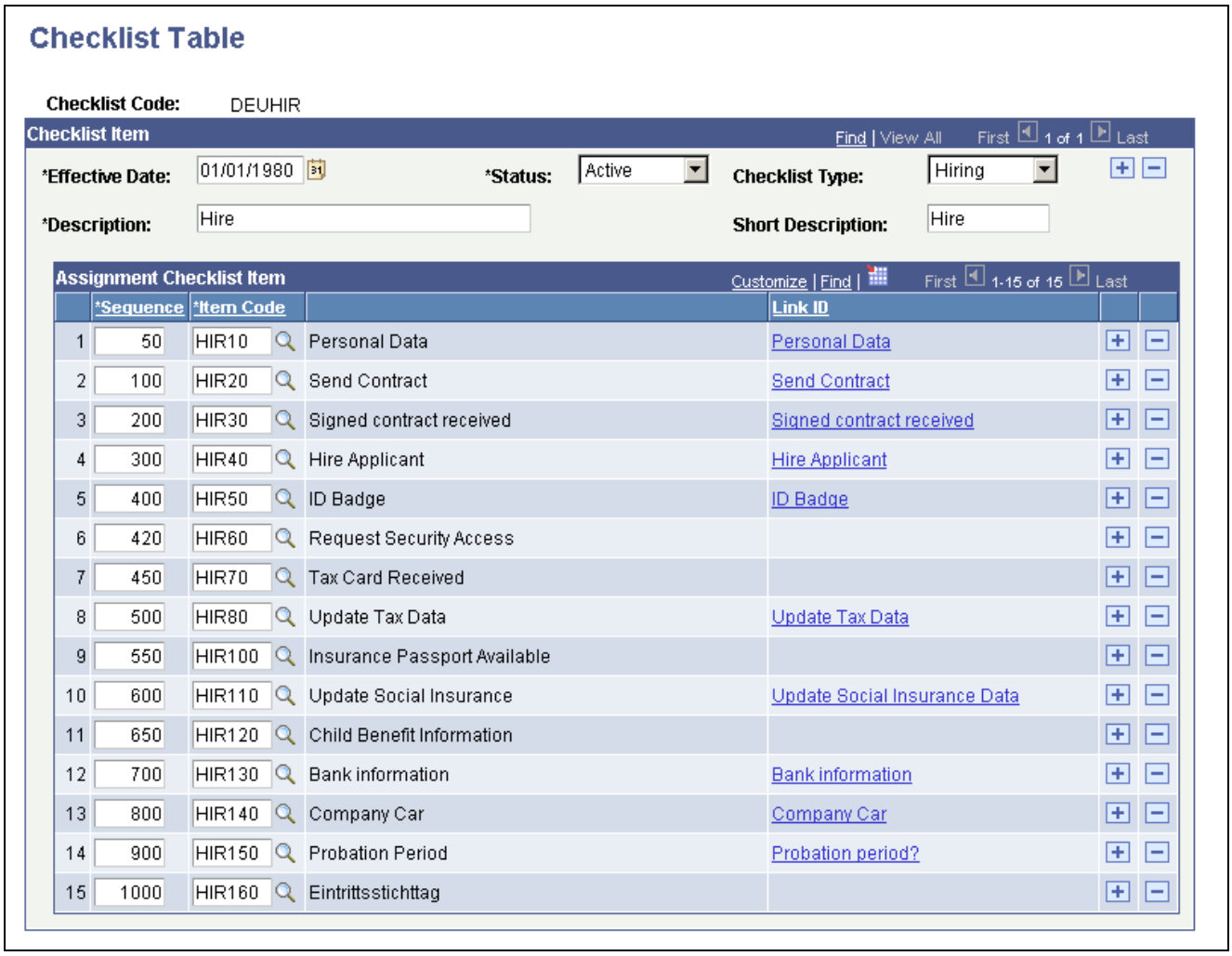
Pages Used to Create Checklists

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

Setting Up Standard Checklists

Access the Checklist Table page.

Copyright © 1988-2006, Oracle. All rights reserved.



Checklist Table

Checklist Code: DEUHIR

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

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

*Description: Hire Short Description: Hire

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

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

Checklist Table page

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

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

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

Copyright © 1988-2006, Oracle. All rights reserved.

Setting Up Workforce Contracts

Use the Define Contract Types component (CONTRACT_TYPE_TBL), Contract Type Groups component (CNTRCT_TYPE_GRP), Contract Clause Table component (CNT_CLAUSE_TABLE), Contract Template Table component (CNT_TEMPLATE_TABLE), and Contract Pay Type CAN & USA component (CONTRACT_PAY_TYPE) to set up contracts for your workforce.

This section discusses how to:

- Define contract types.
- Set up standard contracts.
- Define contract pay types.

Copyright © 1988-2006, Oracle. All rights reserved.

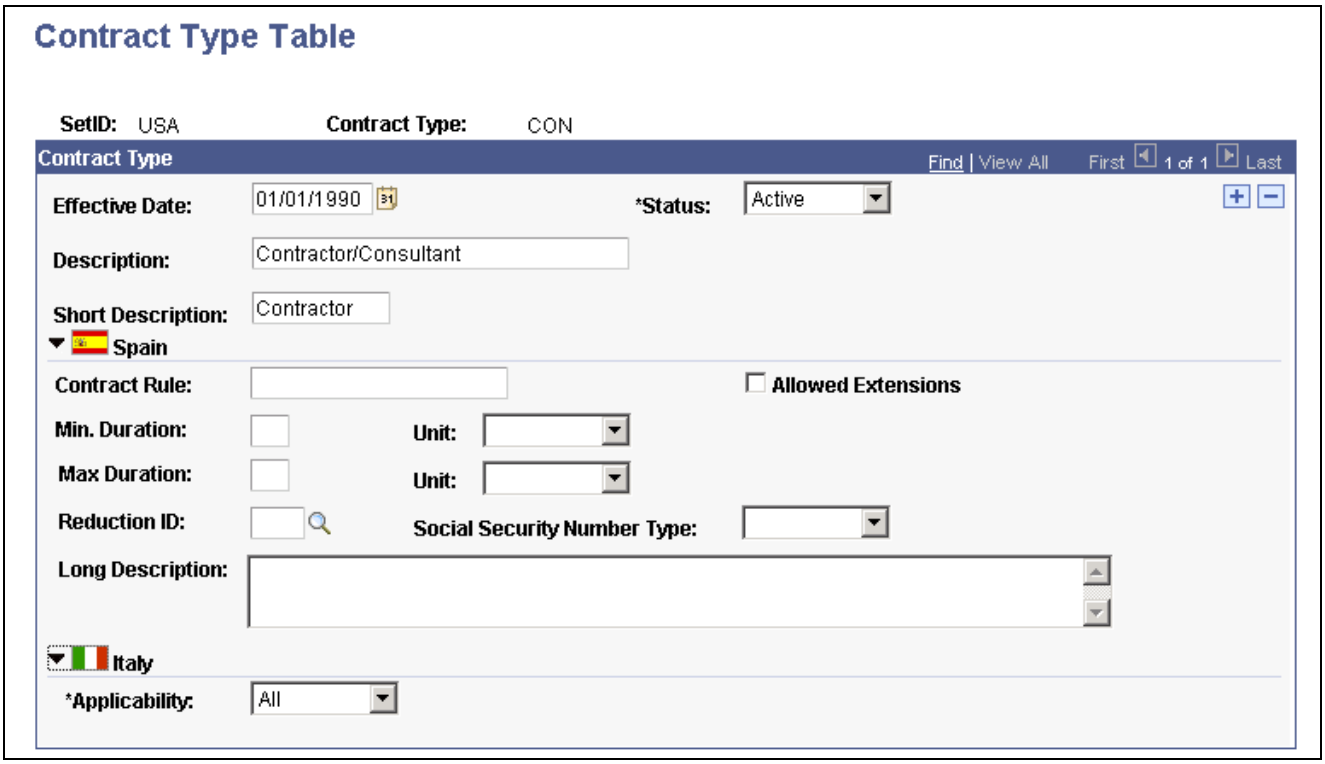
Pages Used to Set Up Workforce Contracts

Page Name	Object Name	Navigation	Usage
Contract Type Table	CONTRACT_TYPE_TBL	Workforce Administration, Job Information, Contract Administration, Define Contract Types, Contract Type Table	Define contract types.
Contract Type Group	CNTRCT_TYPE_GRP	Set Up HRMS, Product Related, Workforce Administration, Contract Administration, Contract Type Groups, Contract Type Group	Group contract types together.
Contract Clause Table	CNT_CLAUSE_TABLE	• Set Up HRMS, Product Related, Workforce Administration, Contract Administration, Contract Clause Table, Contract Clause Table • Workforce Administration, Job Information, Contract Administration, Define Contract Clauses, Contract Clause Table	Define special languages and riders that can be added to the main body of a workforce contract.
Contract Template Table	CNT_TEMPLATE_TABLE	• Set Up HRMS, Product Related, Workforce Administration, Contract Administration, Contract Template Table, Contract Template Table • Workforce Administration, Job Information, Contract Administration, Define Contract Templates, Contract Template Table	Set up all of your organization's standard workforce contracts. Use the information that you define here when you assign contracts to employees and contingent workers in your organization.
Contract Pay Type	CONTRACT_PAY_TYPE	Set Up HRMS, Product Related, Workforce Administration, Contract Administration, Contract Pay Type CAN & USA, Contract Pay Type	Define types of contract pay.

Defining Contract Types

Access the Contract Type Table page.

Copyright © 1988-2006, Oracle. All rights reserved.



Contract Type Table page

(ESP) Spain

Contract Rule

Enter the number of the law that governs this kind of contract. A typical law number includes the type of law, law number, and year—for example, RD 3290/1997 or Ley 22/1995.

The system doesn't edit your entry.

Allowed Extensions

Select to permit extensions to be added to this type of contract.

Min. Duration (minimum duration), **Max Duration** (maximum duration), and **Unit**

Specify the minimum and maximum length that is allowed for this type of contract. Enter a quantity in the Min. Duration and Max Duration fields and use the Unit field to select a unit of time. For example, if the minimum contract duration is six months, enter 6 in the Min. Duration field, then select *Months* from the available options in the Unit field.

Reduction ID

This field is active only if PeopleSoft Enterprise Global Payroll for Spain is installed. Select the reduction ID that corresponds to the contract type. The reduction ID identifies the specific reduction definition or rule that applies to an employer. In certain limited cases—such as when a company hires employees with disabilities, or hires workers older than 45 years of age—the employer may qualify for a reduction in the amount of social security contributions.

Soc. Sec. Nbr. For Employer Type (social security number for employer type)

Select a social security number type from the available options: none, *Part Time*, *Regular*, and *Training*.

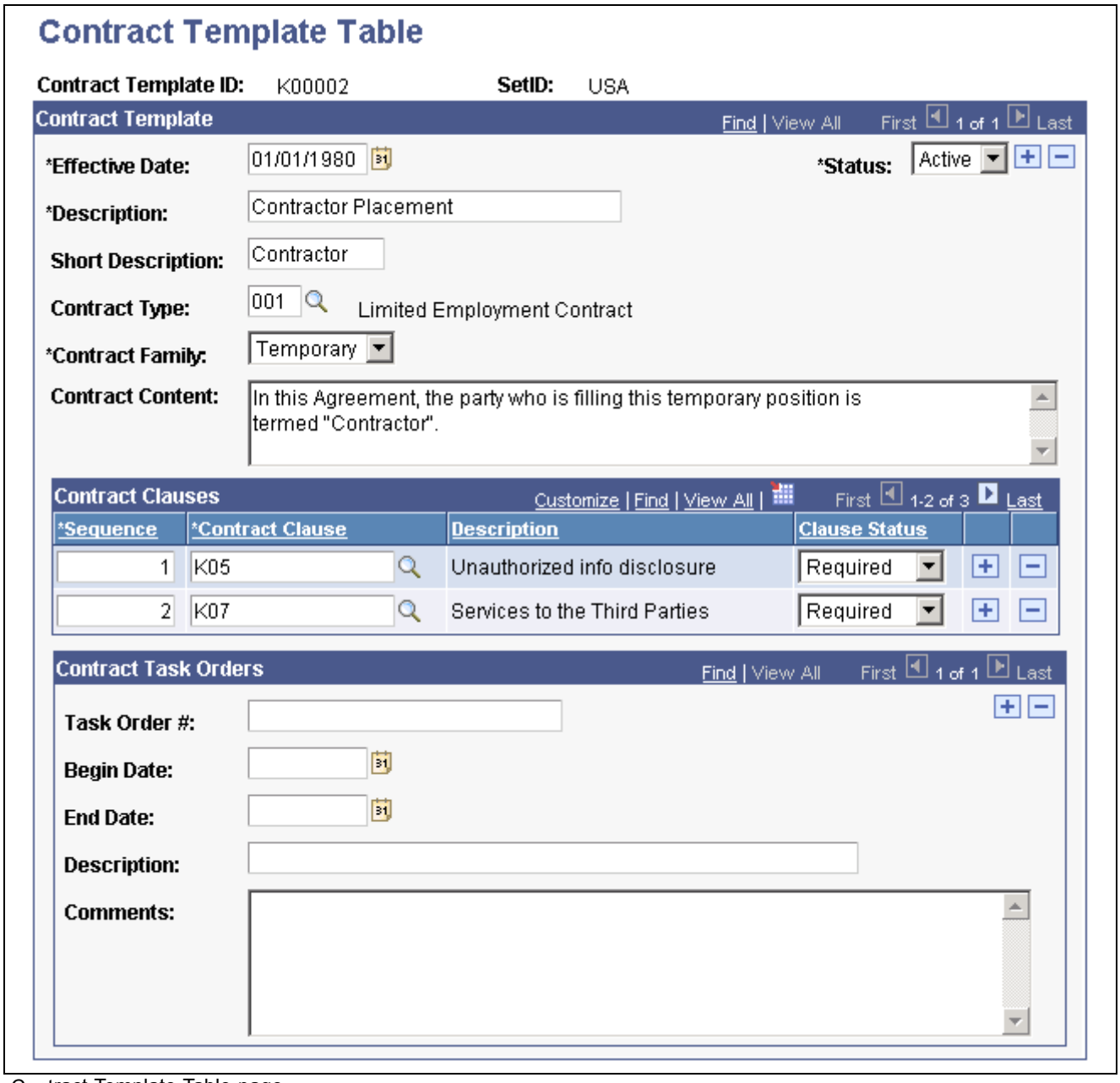
Copyright © 1988-2006, Oracle. All rights reserved.

(ITA) Italy

Applicability Select whether this contract type is applicable to employees, contingent workers, or both.

Setting Up Standard Contracts

Access the Contract Template Table page.



Contract Template Table page

Contract Type Select the contract type for this template from the contract types you have set up on the Contract Type Table page.

Copyright © 1988-2006, Oracle. All rights reserved.

Contract Family Enables you to group a class of contracts. For example, you may have one contract family for regular employee contracts and another for contingent worker contracts. Tying contracts to a contract family helps you narrow your search criteria when you select a contract template.

Contract Clauses

Use this group box to define any special contract clauses that should be attached as riders to this contract template.

Sequence Enter the order in which to add the contract clauses to the contract.

Contract Clause Select a contract clause from among those you've defined on the Contract Clause Table page. For example, a contract for a limousine driver requires that the employee have a driver's license.

Clause Status Indicate if the clause is *Optional* or *Required*.

Define Contract Pay Types

Access the Contract Pay Type page.



Contract Pay Type page

Payment Term Select:

- *Pay Over 12 Months*

  Pay contracts over 12 months, starting on or before the contract begin date, and ending on or after the contract end date.

- *Pay Over Contract*

  Pay contacts over the length of the contract, as defined on the Contract Status/Content page (CONTRACT1).

See Chapter 8, "Entering Additional Data in Human Resources Records," Adding Basic Contract Information, page 286.

Copyright © 1988-2006, Oracle. All rights reserved.

- *Pay Over X Months*

  Pay contracts over a greater time period than the contract period, but less than a year.

- *Pay with Lump Sum*

Monthly Frequency Select the frequency with which payments will be made for this contract pay type.

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "(E&G) Administering Contract Pay"

Copyright © 1988-2006, Oracle. All rights reserved.

CHAPTER 3

Setting Up Country-Specific Tables

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

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

Understanding Country-Specific Table Setup

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

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

See Also

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

(FRA) Setting Up French Workforce Tables

To set up the French workforce tables, use the APE Table (APE_TABLE_FRA), the INSEE Table (INSEE_TABLE_FRA), the External Variables (EXTERNAL_VARIABLES), URSSAF Table (URSSAF_TABLE_FRA), FRA CPAM Table (CPAM_TABLE_FRA), FRA CRAM table (CRAM_TBL_FRA), Hour Type table (HOUR_TYPE_TABLE), and Occupational Illness (OCC_ILLNESS_FRA) components.

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

- Maintain INSEE codes.

Copyright © 1988-2006, Oracle. All rights reserved.

- Enter salary and social security ceiling information.
- Define hours type codes.
- Enter French occupational illness codes.

Understanding French Social Security Tracking Code Maintenance

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

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

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

Track and report on occupational injuries for French workers using the Monitor Health and Safety business process in PeopleSoft Enterprise Human Resources.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Monitor Health and Safety, "Creating and Tracking Incidents"

Pages Used to Set Up French Workforce Tables

Page Name	Object Name	Navigation	Usage
APE Table	APE_INDSTRY_CD_FRA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, APE Table	Maintain APE codes for your French organization. APE codes are used to classify the type of industry (such as software, banking, and insurance) that a company represents. APE codes are a normalized set of codes that are required by law and are used on Training Report 2483 (TRN029).
Insee Table Fra	INSEE_TABLE_FRA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, INSEE Table	Maintain INSEE codes for your French organization.

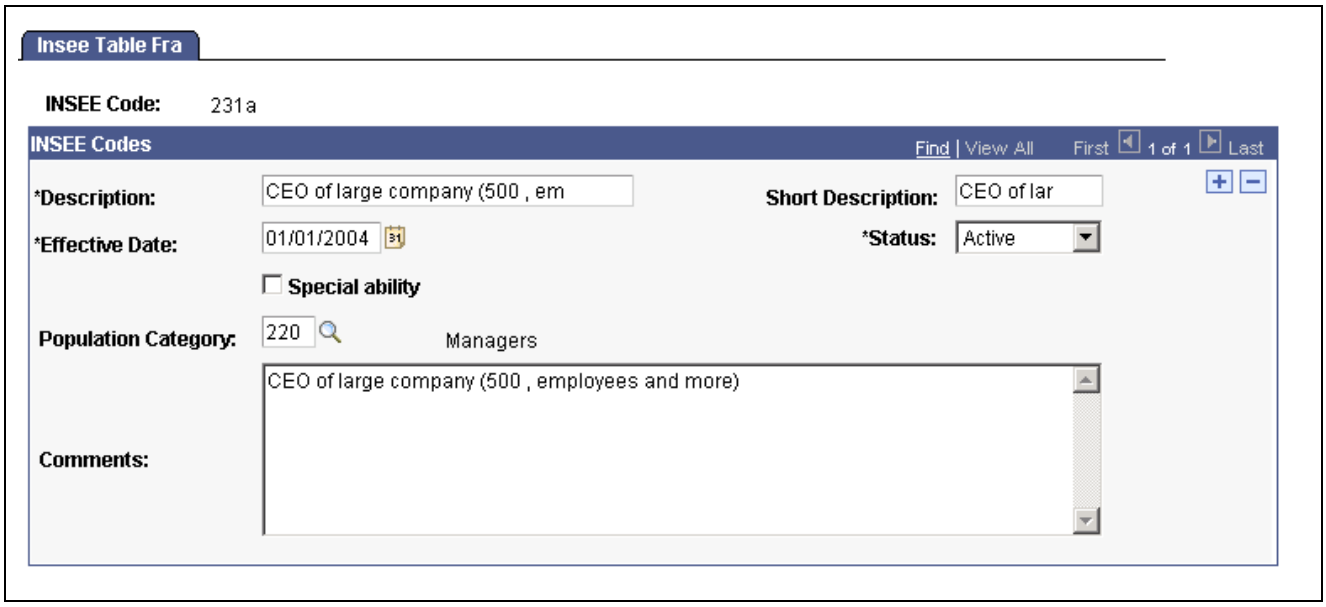
Copyright © 1988-2006, Oracle. All rights reserved.

Page Name	Object Name	Navigation	Usage
External Variables	EXT_PARM_CD_FRA	• Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, External Variables • Set Up HRMS, Product Related, Workforce Monitoring, Regulatory Requirements FRA, External Variables	Enter information that is related to the salaries and Social Security ceilings that are established by the French government each year.
URSSAF Table	URSSAF_TABLE_FRA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, URSSAF Table	Set up URSSAF codes. The URSSAF is a French administration that collects the worker and employer contributions for Social Security. This table stores the codes for the local URSSAF offices.
FRA CPAM Table	CPAM_TABLE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, CPAM Table, FRA CPAM Table	Modify or add a CPAM ID to your human resources system.
FRA CRAM Table	CRAM_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, CRAM Table, FRA CRAM Table	Modify or add a CRAM code to your human resources system.
Hour Type Table	HOURS_TYPE_FRA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data FRA, Hours Type, Hour Type Table	Define hours type codes that you'll use to track job hours information for French workers.
Occupational Illness	OCC_ILLNESS_FRA	Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Occupational Illness Tbl - FRA, Occupational Illness	Enter French occupational illness codes.

Maintaining INSEE Codes

Access the Insee Table Fra page.

Copyright © 1988-2006, Oracle. All rights reserved.



Insee Table Fra page

The system displays the description that you enter for this code on pages or reports in PeopleSoft Enterprise Human Resources that reference the INSEE code.

These values are set by the INSEE and classify job codes. Link INSEE codes to job codes that are used in French organizations on the Job Data - Evaluation Criteria page.

Special ability Select if this INSEE code represents a job that requires a special ability.

An worker who is assigned (through the job code) an INSEE code with this check box selected can't be listed as disabled on the French Disability report.

Population Category Select the population category associated with this INSEE code. Population codes are used in the definition of contingency contracts to identify the population covered by a contract. Population codes are also used by the DUCS reporting in PeopleSoft Enterprise Global Payroll for France.

See Also

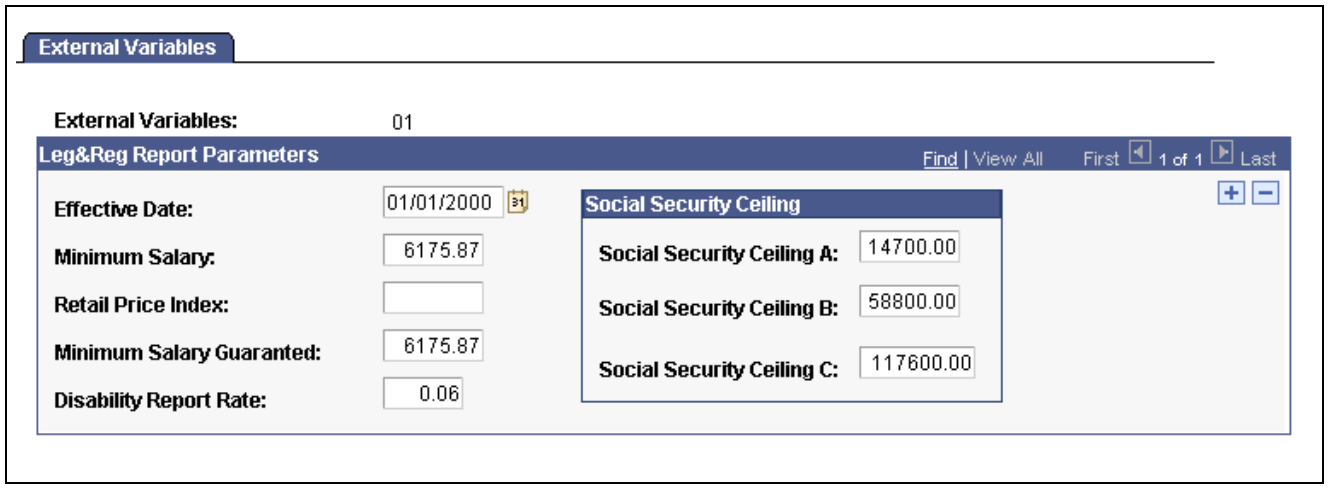
PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up Jobs," Classifying Jobs

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements, "(FRA) Meeting Regulatory Requirements for France," Setting Up French Regulatory Requirements

Entering Salary and Social Security Ceiling Information

Access the External Variables page.

 Copyright © 1988-2006, Oracle. All rights reserved.



External Variables page

The values that you enter act as a reference for salary and payroll processing in PeopleSoft Human Resources.

Leg&Reg Report Parameters (legislative and regulatory report parameters)

Minimum Salary, Retail Price Index, and **Minimum Salary Guaranteed**

Enter a minimum salary, retail price index, and guaranteed minimum salary for this external variable. The French government sets the amounts.

Disability Report Rate

Prior to launching the Disability report (DIS001), enter a disability report rate. The rate is set by the French government, and the current rate is 6 percent (a field value of *0,06*). The disability report rate is set up in the External Variables Table.

Social Security Ceiling

These ceiling values are determined every year by the French Social Security Administration; the values that you enter are the ceiling values that define different income brackets for French workers. They are also used as a reference for payroll calculations for French workers because many types of Social Security contributions are calculated based on the Social Security income bracket into which an worker's salary falls.

For example, if you enter the following Social Security ceilings for Social Security Ceiling A, B, and C, and the tax rates for each bracket of income are as shown:

	Bracket A	Bracket B	Bracket C	Above
Ceiling	2279 EUR	9116 EUR	18233 EUR	
Tax Rate	10%	15%	18%	20%

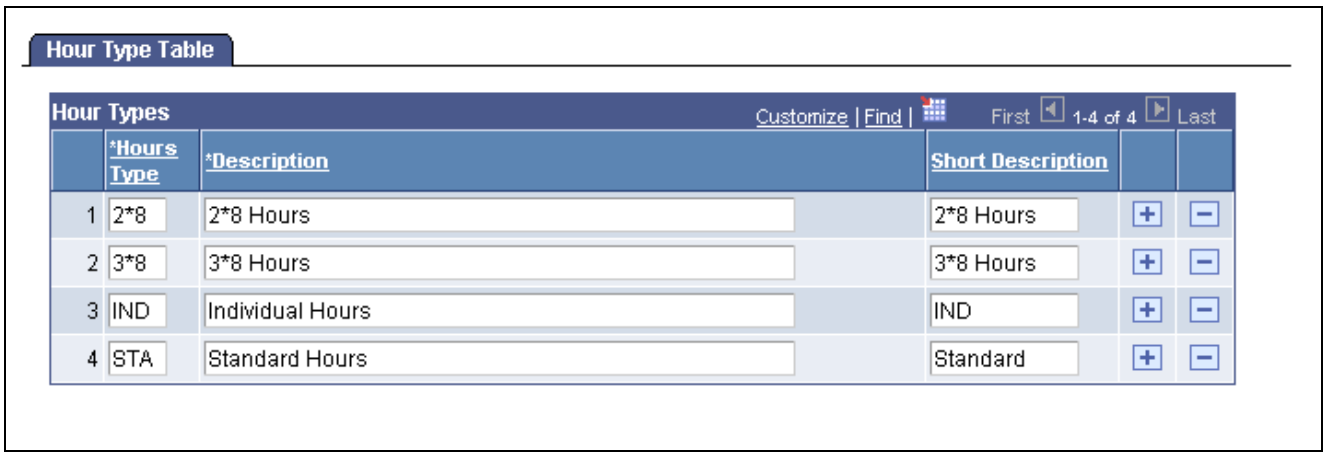
Then an worker whose salary is 31000 EUR per month, based on this Social Security and tax rate scenario, is required to pay the following Social Security premium:

(2,279 X 10%) + (9,116 X 15%) + (18,233 X 18%) + (1,372 X 20%)

Copyright © 1988-2006, Oracle. All rights reserved.

Defining Hours Type Codes

Access the Hour Type Table page.



Hour Type Table page

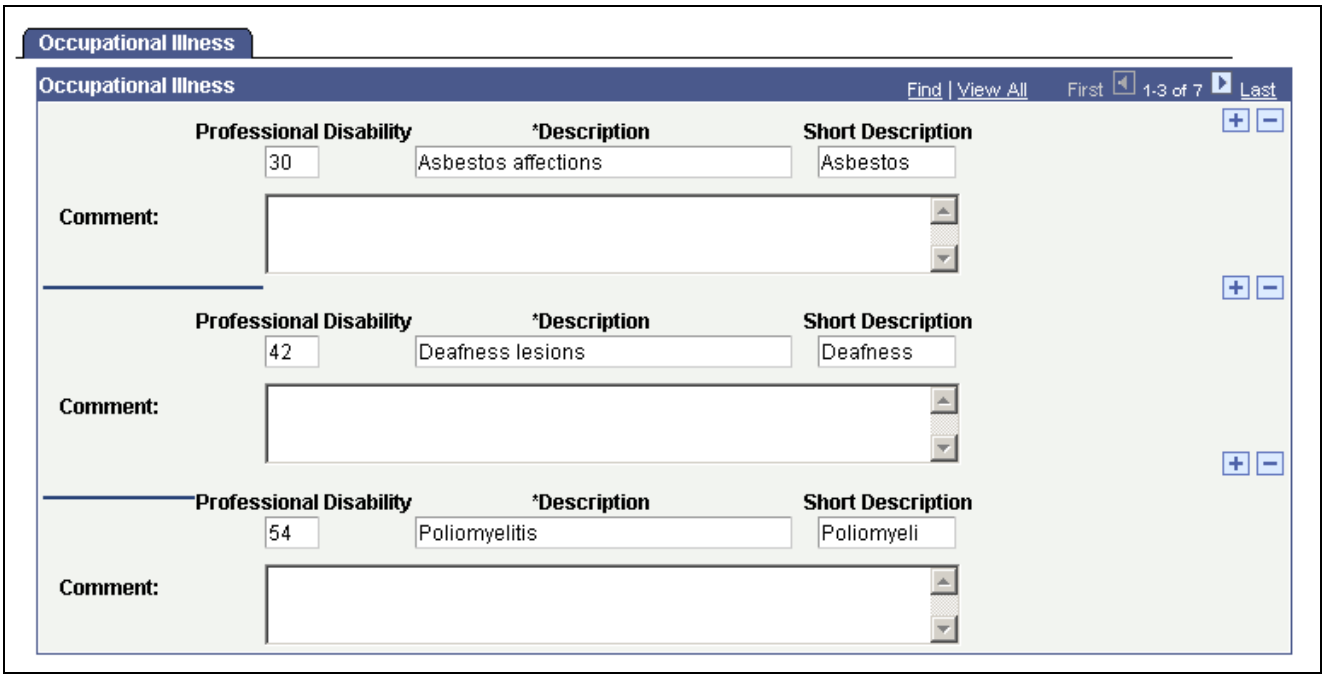
Hours Type Enter the hours type code you are defining. Add rows to define as many hours type codes as needed.

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

Entering French Occupational Illness Codes

Access the Occupational Illness page.

Copyright © 1988-2006, Oracle. All rights reserved.



Occupational Illness page

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

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

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

(DEU) Setting Up German Workforce Tables

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

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

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

Copyright © 1988-2006, Oracle. All rights reserved.

Understanding Accident Insurance

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

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

Pages Used to Set Up German Workforce Tables

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

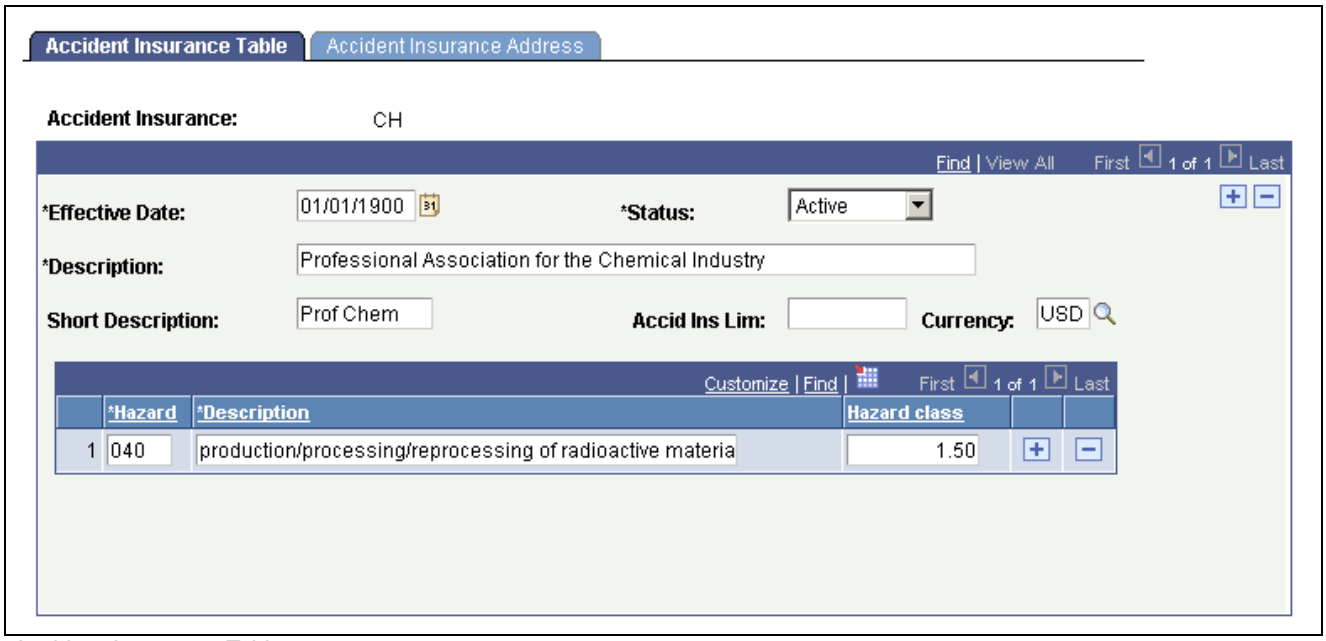
Copyright © 1988-2006, Oracle. All rights reserved.

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

Defining Accident Insurance Codes

Access Accident Insurance - Accident Insurance Table page.

Copyright © 1988-2006, Oracle. All rights reserved.



Accident Insurance Table page

Hazard Enter the code for the hazard type.

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

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

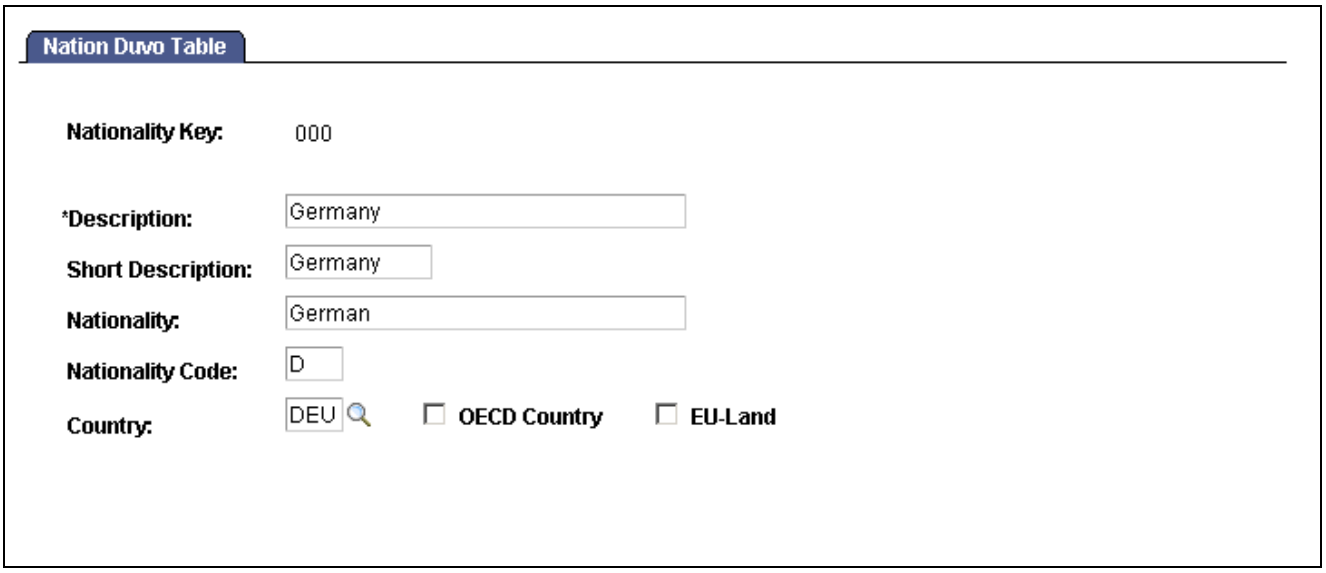
Entering German Nation DEUEV Codes

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

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

Access the Nation Duvo Table page.

Copyright © 1988-2006, Oracle. All rights reserved.



Nation Duvo Table page

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

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

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

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

OECD Country (Organization of Economic Cooperation and Development country) — Select to indicate the nationality key is for an OECD country. Germany carefully regulates the types of industries in which citizens of non-OECD countries, like Iraq, can work. For example, non-OECD nationals are restricted from working in defense-related industries or for companies that produce products involving protected trade technologies.

Note. There isn't always a one-to-one correspondence between ISO countries on the Country table and the nationality keys on the Nation DEUEV table. The German DEUEV Directive makes nationality distinctions that have no direct relationship to ISO country standards.

EU-Land (European Union country) — Select to indicate this is European Union country. Workers from European Union nations are tracked for purposes of reporting to the German Social Insurance administration.

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

Copyright © 1988-2006, Oracle. All rights reserved.

(NLD) Setting Up Dutch SAMEN Countries

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

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

Note. From December 31, 2003 the SAMEN law is no longer a legislative requirement. However, we continue to provide the ability to track employees' national origin to enable you to monitor workforce diversity.

Understanding SAMEN Country Setup

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

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

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

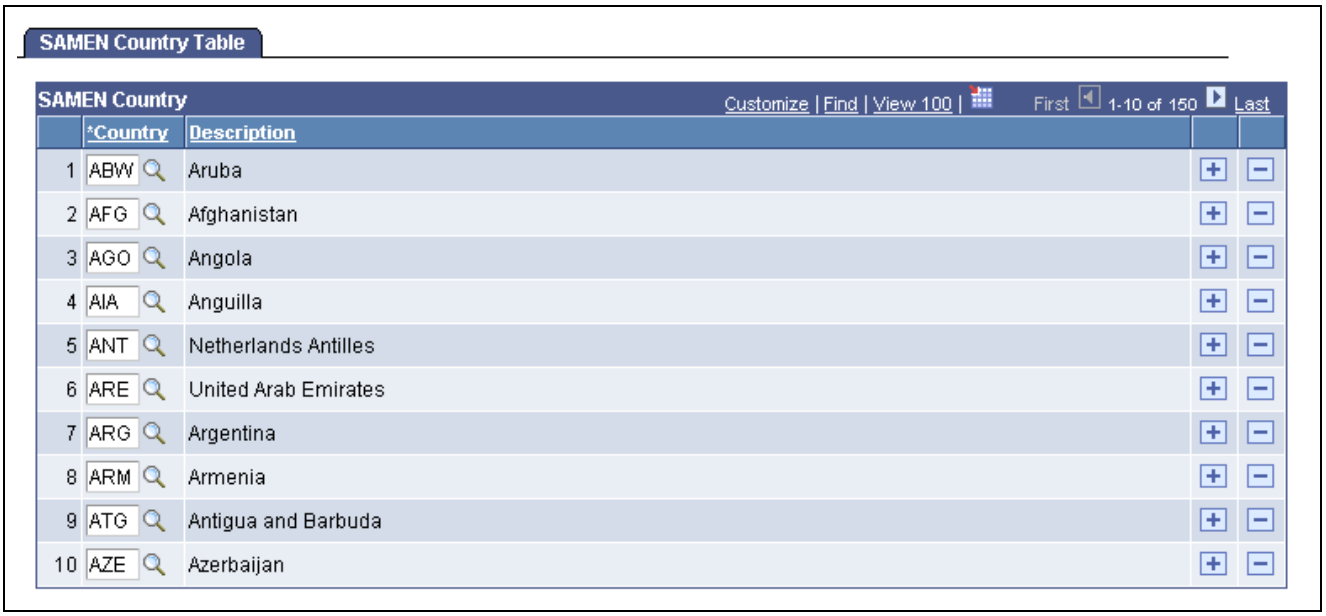
Page Used to Set Up Dutch SAMEN Country Table

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

Updating the List of SAMEN Countries

Access the SAMEN Country Table page.

 Copyright © 1988-2006, Oracle. All rights reserved.



SAMEN Country Table page

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

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

(ITA) Setting Up Italian Workforce Tables

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

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

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

Pages Used to Set Up Italian Workforce Tables

Page Name	Object Name	Navigation	Usage
ITA C.I.A. Table (*Contratto Integrativo Aziendale*)	CIA_TBL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, C.I.A., ITA C.I.A. Table	Enter company integrative contract information.

Copyright © 1988-2006, Oracle. All rights reserved.

Page Name	Object Name	Navigation	Usage
ITA City Table	CITY_TABLE_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Cities, ITA City Table	Use the Italian City Table page to maintain the city data. Update the table by downloading the file supplied annually from the *Ministero delle Finanze* website and the running the Italian City Update process. You can enter the postal codes for cities to expedite data entry during the hiring process.
ITA INAIL Table	INAIL_TBL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, INAIL Codes, ITA INAIL Table	Define the INAIL (*Istituto Nazionale per l'Assicurazione degli Incidenti sul Lavoro*) position code and rate for INAIL contribution.
ITA INPDAI Table	INPDAI_TBL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, INPDAI Codes, ITA INPDAI Table	Define the INPDAI (*Istituto Nazionale di Previdenza per I Dirigenti di Aziende Industriali*) position codes for pension funds. **Note.** The INPDAI codes are used for historical data only. The INPDAI is no longer a legal body in Italy and these codes are no longer required.
INPS Site	INPS_SITE_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, INPS Sites, INPS Site	Set up INPS (*Istituto Nazionale per la Previdenza Sociale*) site codes. Link INPS sites to INPS codes on the ITA INPS Table page.
ITA INPS Table	INPS_TBL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, INPS Codes, ITA INPS Table	Define INPS data for social security contributions and information needed for social security reporting (DM10).
ITA PREV Table	PREV_TBL_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, PREV Codes, ITA PREV Table	Define PREVINDAI codes, descriptions, and PREVINDAI position codes.
Company Codes - INPS Codes	COMP_INPS_ITA	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ITA, Company Codes, INPS Codes	Link the company with INPS codes.

Copyright © 1988-2006, Oracle. All rights reserved.

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

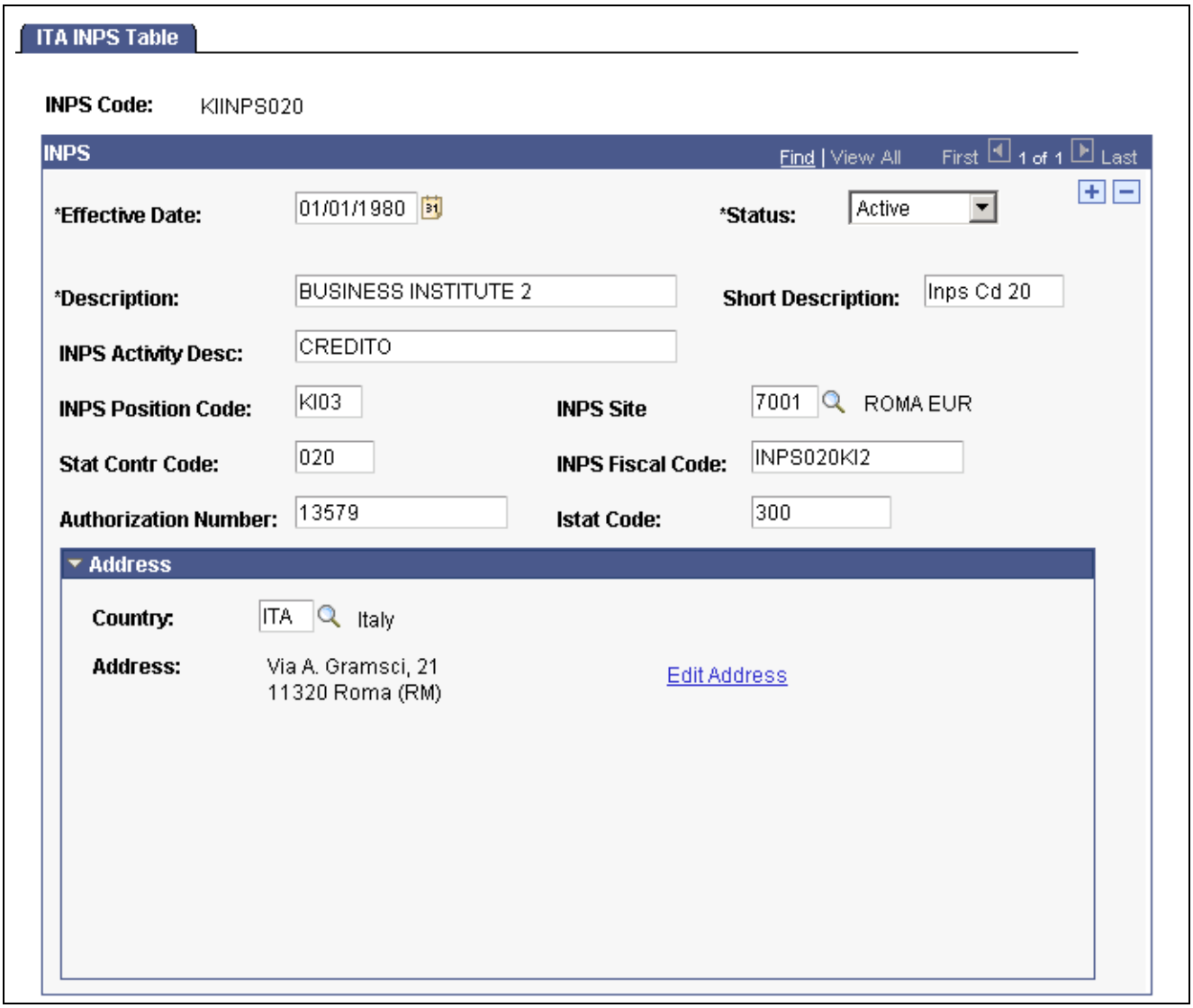
Copyright © 1988-2006, Oracle. All rights reserved.

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

Defining INPS Codes

Access the ITA INPS Table page.

Copyright © 1988-2006, Oracle. All rights reserved.



ITA INPS Table page

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

INPS Position Code Enter the company INPS position codes.

INPS Site Select the INPS site to which the company must send declarations. Set up INPS site codes on the INPS Site page.

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

INPS Fiscal Code Enter the company fiscal code.

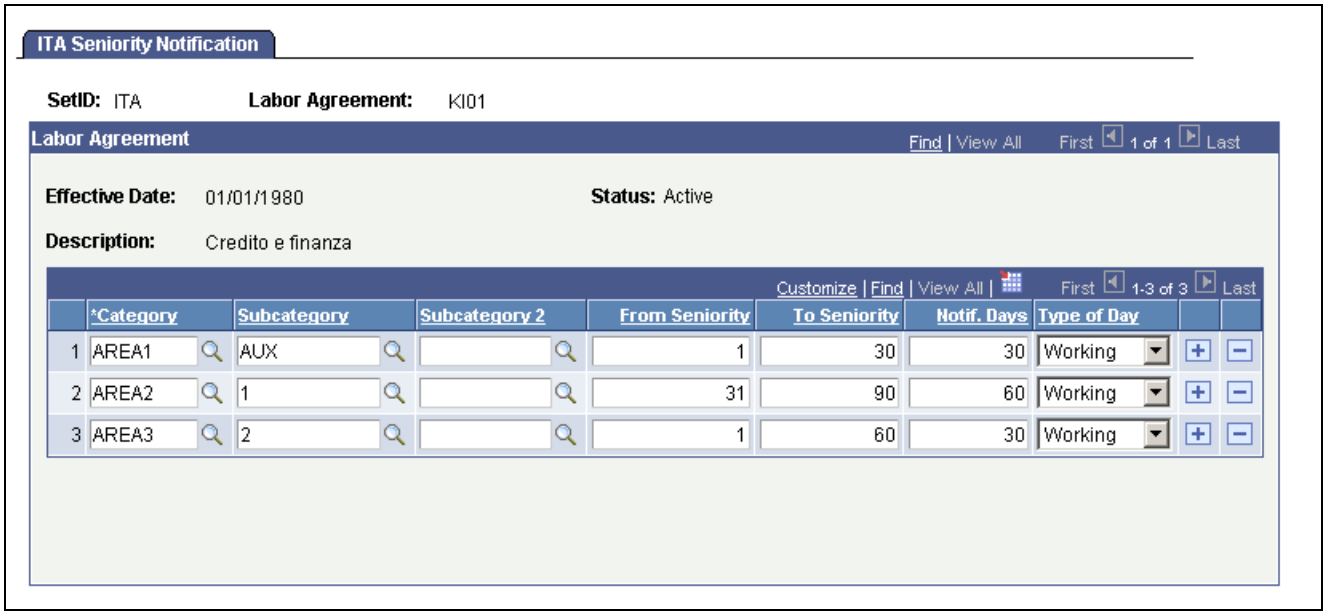
Authorization Number Enter the authorization codes to be reported on the INPS declarations.

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

Copyright © 1988-2006, Oracle. All rights reserved.

Defining Seniority Notification Periods

Access the ITA Seniority Notification page.



ITA Seniority Notification page

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

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

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

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

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

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

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

(JPN) Setting Up Intercompany Transfer Company Data

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

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

Copyright © 1988-2006, Oracle. All rights reserved.

Understanding Setup of Company Data for Intercompany Transfers

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

To set up company data for intercompany transfers for Japan:

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

See Also

Chapter 2, "Setting Up the Administer Workforce Business Process," Understanding Supervisor Levels, page 34

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

Chapter 13, "(JPN) Tracking Intercompany Transfers (Shukkou)," Indicating the Home or Host Compensation Owner, page 496

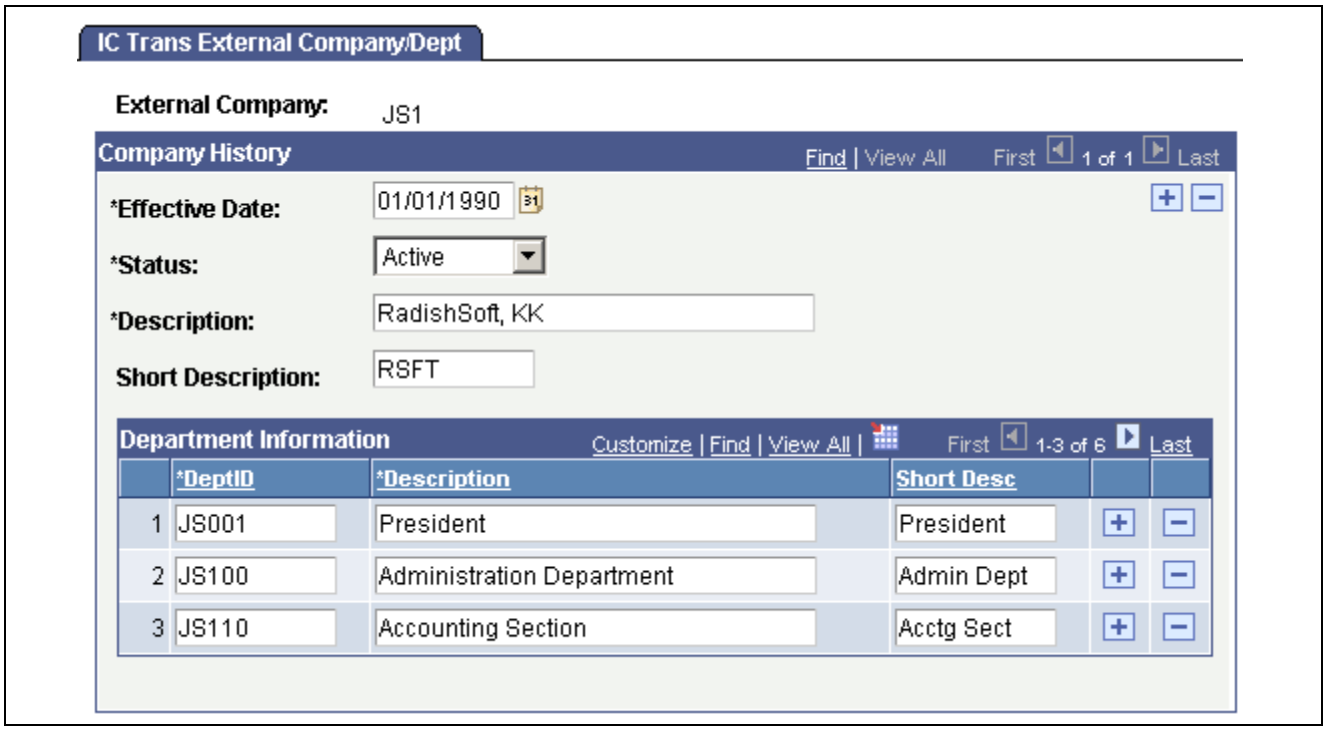
Pages Used to Set Up Intercompany Transfer Company Data

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

Setting Up Company Data for Intercompany Transfers

Access the IC Trans External Company/Dept page.

Copyright © 1988-2006, Oracle. All rights reserved.



IC Trans External Company/Dept page

The Effective Date must be prior to any intercompany transfer effective dates to transfer to the external company, and the Status option must be *Active*.

Enter required rows in the Department Information group box.

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

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

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

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

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

Copyright © 1988-2006, Oracle. All rights reserved.

(NZL) Setting Up New Zealand Disability Codes

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

Page Used to Set Up New Zealand Disability Codes

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

(ESP) Setting Up Spanish Workforce Tables

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

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

This section discusses how to:

- Enter Country codes for social security reporting.
- Enter Industry Activity codes.
- Enter insurance company descriptions and address information.
- View risk codes.
- Define maximum and minimum social security ceilings.
- Define maximum and minimum social security bases by work group.
- Define contribution rates and percentages.
- Enter company information needed for Social Security reporting.
- Define a social security time limit for FDI data.
- Define Spanish hiring centers.

Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used for Spanish Workforce Tables

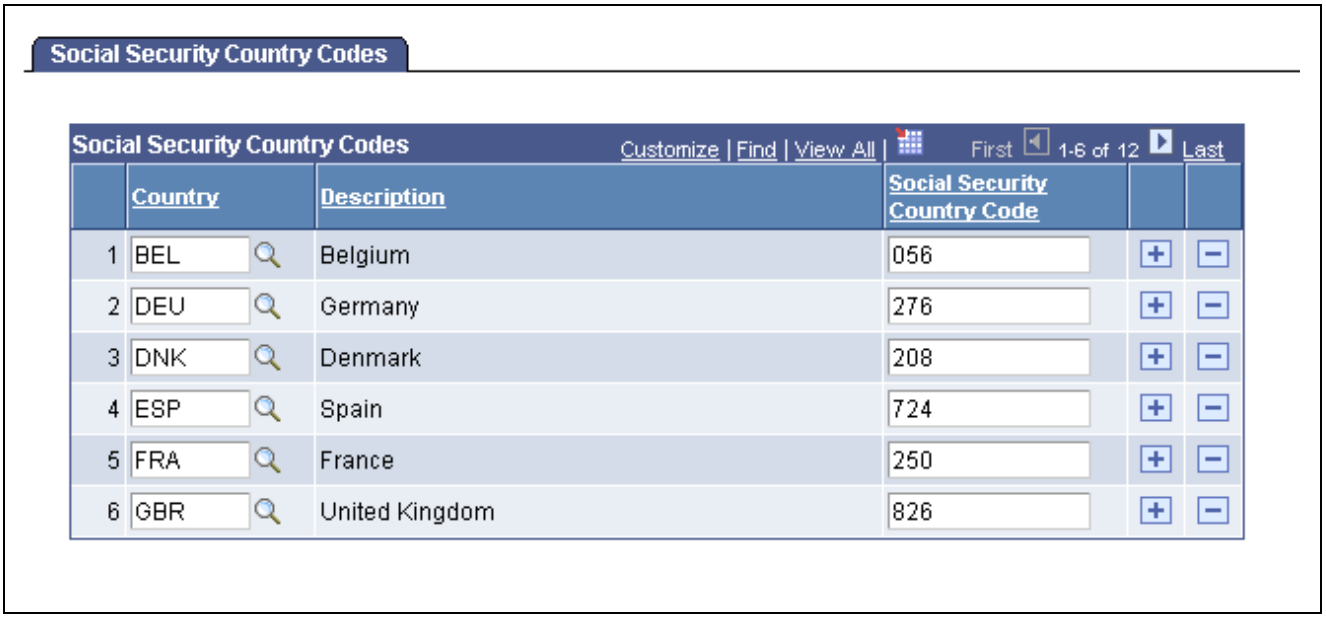
Page Name	Object Name	Navigation	Usage
Social Security Country Codes	SOCS_CNTRY_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Country Codes Table, Social Security Country Codes	Enter country codes valid for social security reporting purposes.
Industry Activity	INDUSTRY_ACT_CD_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Industry Activity Table, Industry Activity	Enter industry activity codes and descriptions. The industry activity code helps determine the employer social security number.
Insurance Company	INSUR_COMP_CD_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Insurance Company Table, Insurance Company	Enter insurance company descriptions and address information.
Social Security Risk Code	SOCS_RISKCD_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Social Security Risk Code, Social Security Risk Code	View the risk codes that can apply to employees in your organization.
Scheme	SOCS_SCHEME_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Social Security Scheme Table, Scheme	Review or define maximum and minimum social security ceilings, as well as review or define the minimum hourly rate for each social security scheme.
Work Group	SOCS_WRKGRP_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Social Security Scheme Table, Work Group	Define maximum and minimum social security bases by work group, as well as the minimum hourly rate used to calculate the base for part-time employees.
Contribution	SOCS_CONTRIB_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP,Social Security Scheme Table, Contribution	Define the contribution rates and percentages for both employees and employers used in the social security calculation.
Company Setup	SOCS_SETUP_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Social Security Company Setup, Company Setup	Enter specific company information, including data needed for social security purposes.

Copyright © 1988-2006, Oracle. All rights reserved.

Page Name	Object Name	Navigation	Usage
Social Security Data	SOCS_DATA_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Social Security Data, Social Security Data	Define a time limit for transferring FDI medical report data to the social security agency.
Hiring Center	HIRING_CENTER_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Hiring Center Table, Hiring Center	Define the hiring centers you will attach to employee personnel records on the Contract Data page. You connect every Spanish employee with a hiring center.

Entering Country Codes for Social Security Reporting

Access the Social Security Country Codes page.



Social Security Country Codes page

Country Enter the standard ISO country code.

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

Entering Industry Activity Codes

Access the Industry Activity page.

Enter the effective date, status, description, and short description of the industry activity.

Copyright © 1988-2006, Oracle. All rights reserved.

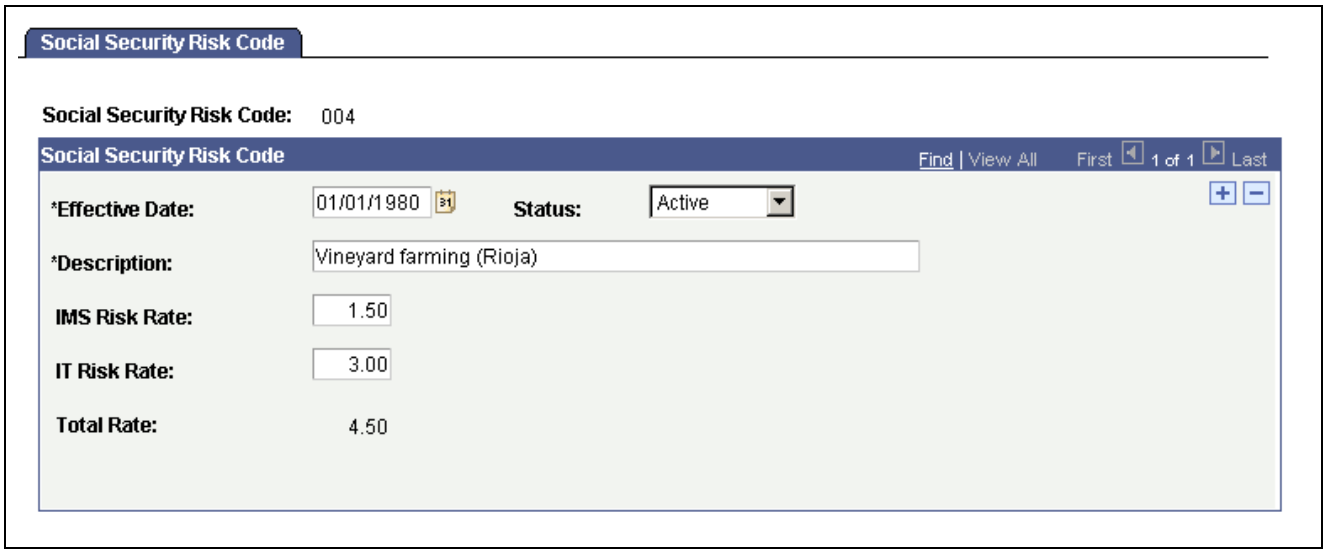
Entering Insurance Company Descriptions and Address Information

Access the Insurance Company page.

Edit Address Click to enter or modify address information.

Viewing Risk Codes

Access the Social Security Risk Code page.



Social Security Risk Code page

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

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

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

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

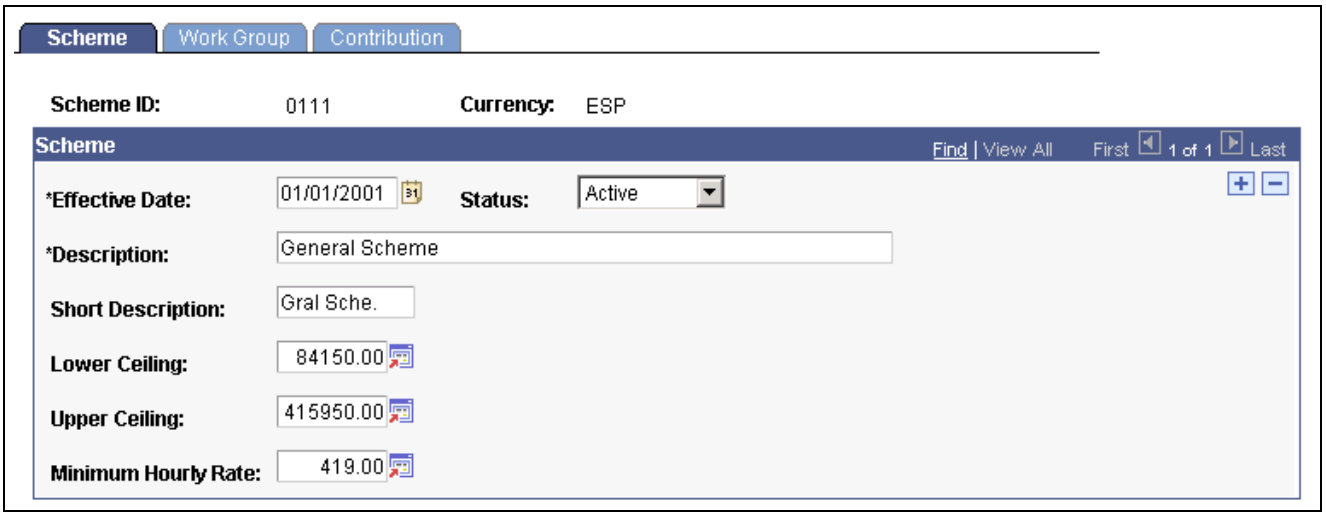
IT Risk Rate (*Riesgo de Incapacidad Temporal*) Displays the IT risk rate that applies to this social security risk code. The Spanish government assigns IT risk rate codes to assess the risk of work-related temporary disability, such as respiratory problems for miners or injuries for construction workers.

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

Defining Maximum and Minimum Social Security Ceilings

Access the Scheme page.

Copyright © 1988-2006, Oracle. All rights reserved.



Scheme page

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

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

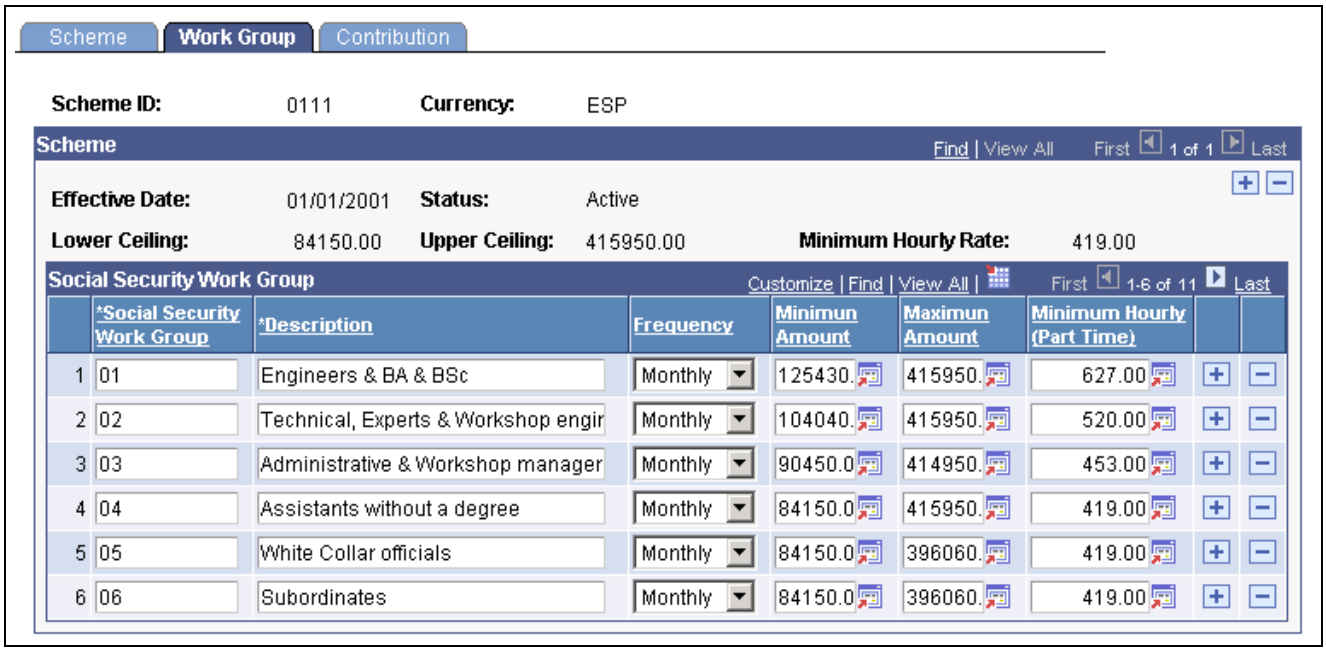
Minimum Hourly Rate Enter the amount used to calculate the professional contingencies funding base in the case of employees working part-time.

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

Defining Maximum and Minimum Social Security Bases by Work Group

Access the Work Group page.

Copyright © 1988-2006, Oracle. All rights reserved.



Work Group page

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

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

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

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

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

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

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

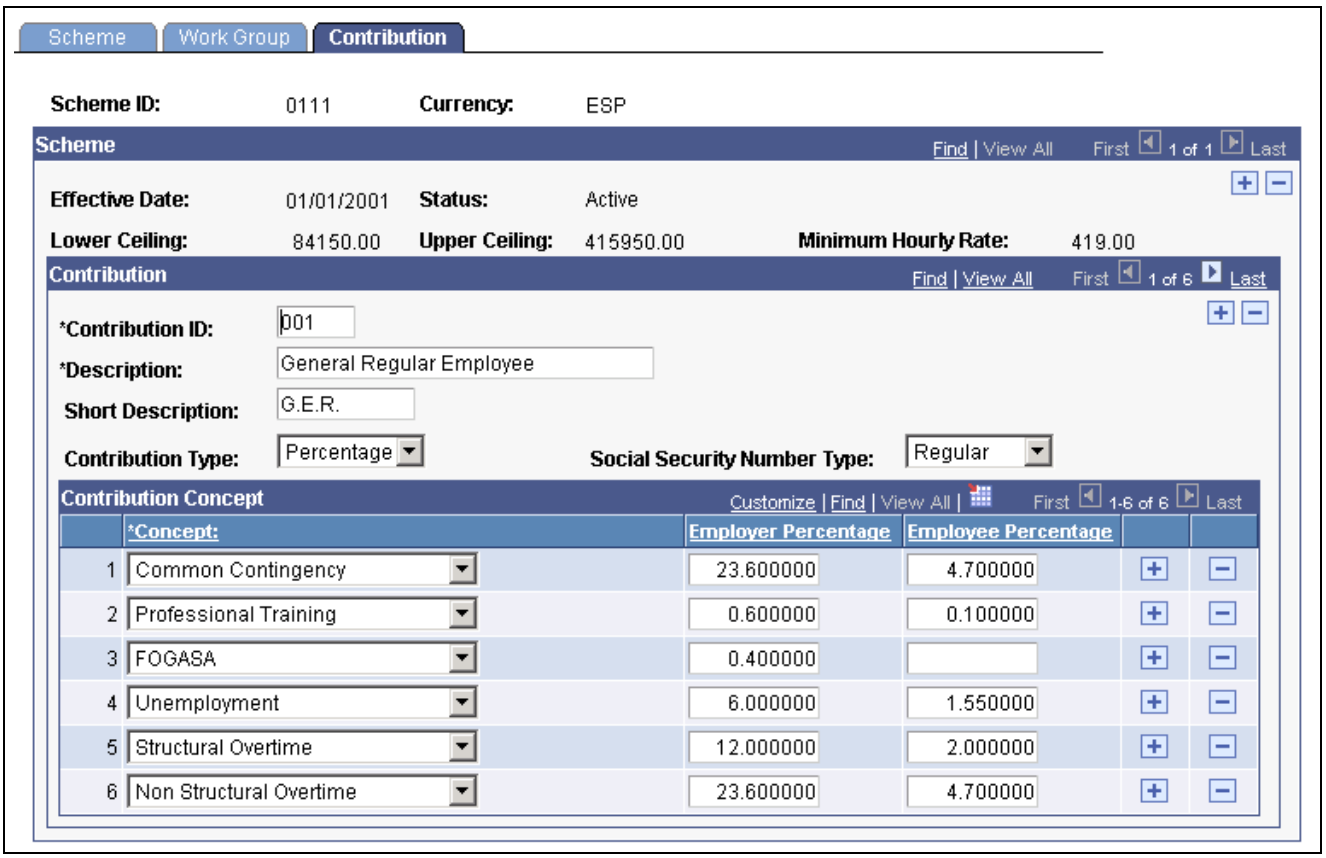
See Also

Chapter 6, "Increasing the Workforce," Entering Job Information, page 160

 Copyright © 1988-2006, Oracle. All rights reserved.

Defining Contribution Rates and Percentages

Access the Contribution page.



Contribution page

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

Contribution ID

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

Possible values for the contribution ID are:

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

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

Copyright © 1988-2006, Oracle. All rights reserved.

Social Security Number Type

Select one of the following values:

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

Contribution Type

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

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

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

Concept

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

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

Employer Rate

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

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

Employer Percentage

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

Employee Rate

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

Employee Percentage

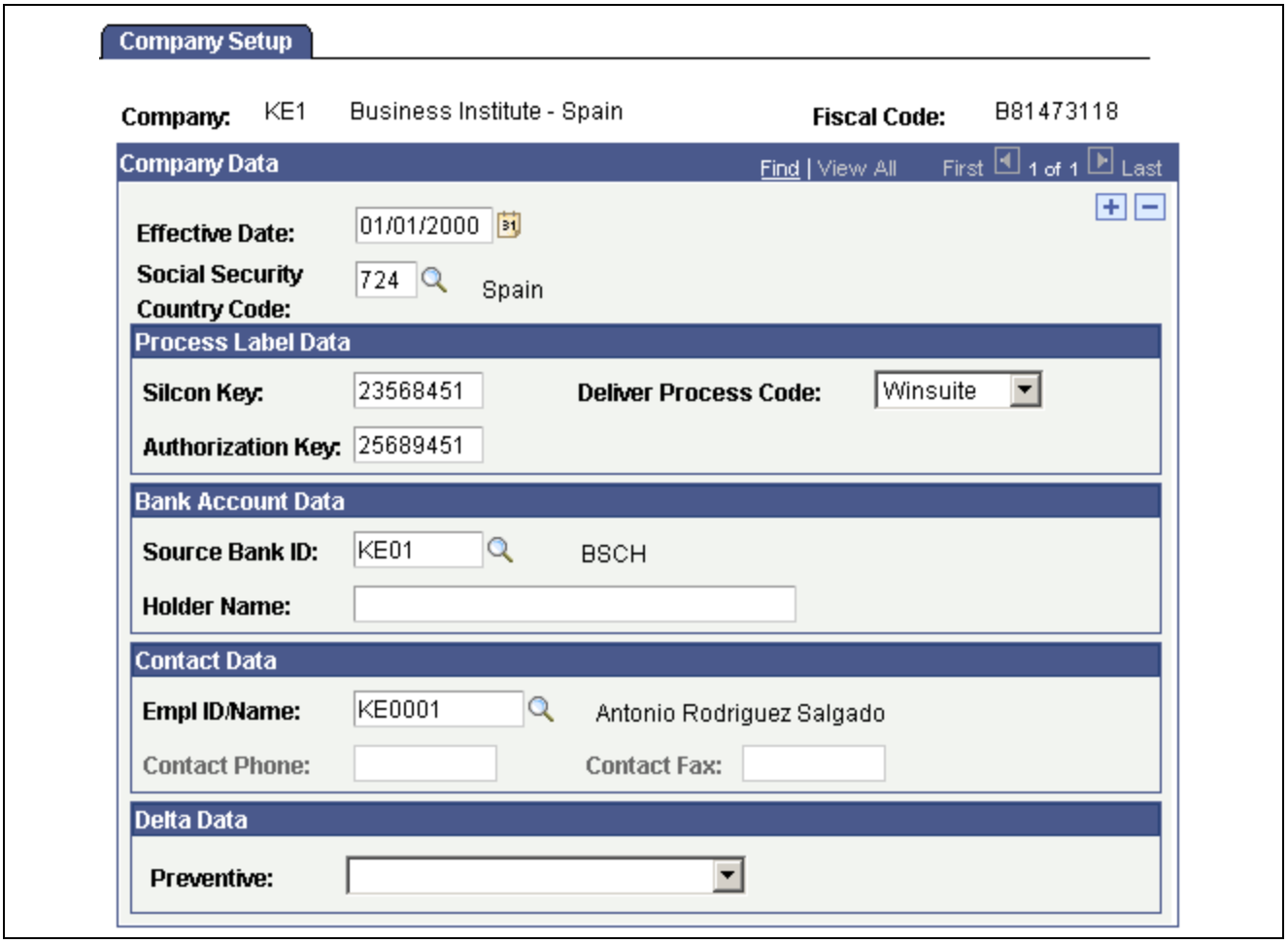
Displays the employee contribution percentage associated with the concept listed in the left-hand column of the grid. Social security contributions of

Copyright © 1988-2006, Oracle. All rights reserved.

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

Entering Social Security Company Information

Access the Company Setup page.



Company Setup page

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

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

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

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

Copyright © 1988-2006, Oracle. All rights reserved.

Source Bank ID Enter the name of the bank the company uses to pay social security contributions.

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

Delta Data

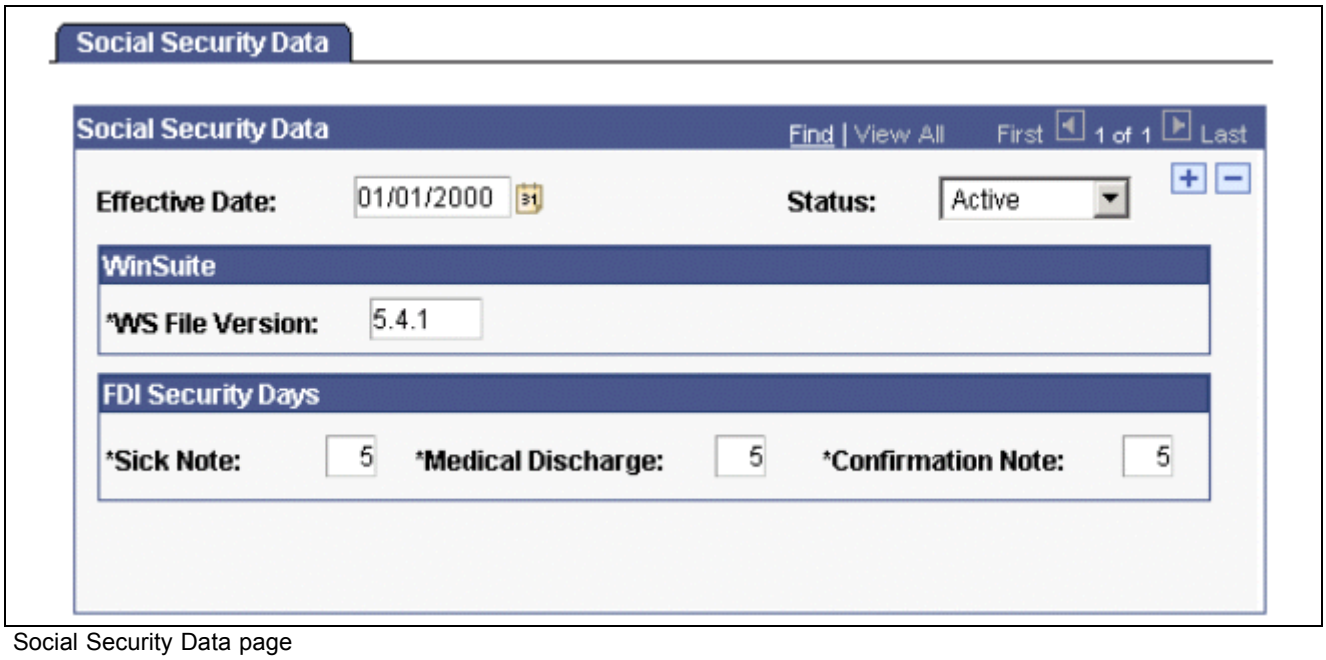
Preventive Identify the kind of labor risk prevention management that the company uses. Valid values are:

- *Business owner:* The company assumes responsibilities. Fills the <asunpersona> tag.
- *Designated Workers:* Managed by designated employees. Fills the <trabdesigna> tag.
- *External:* Managed by an external service outside of the company. Fills the <serprevpro> tag.
- *Internal:* Managed by a service organization within the company. Fills the <serprevaje> tag.
- *None:* The company does not manage labor risk prevention. Fills the <ninguna> tag.
- *Shared:* Managed jointly by several services. Fills the <serprevman> tag.

See Chapter 11, "(ESP) Managing Spanish Reporting," Managing Delta Communications, page 434.

Defining a Social Security Time Limit for FDI Data

Access the Social Security Data page.



Social Security Data page

Copyright © 1988-2006, Oracle. All rights reserved.

WS File Version This field identifies the version of the Winsuite software used by the social security agency for reporting. As this software is updated, you must update the file version.

Sick Note Specify the time limit (in days) for transferring sick note data to the social security agency following receipt of the note from an employee. If you select the Add Security Period check box on the Create FDI File ESP page (discussed below), the system compares the date on which the file with the sick note data is transferred to the agency (system date) to the absence begin date. If the number of days between the file transfer date and the absence begin date exceeds the time limit for sick notes, the system marks the employee as Late on the Create FDI File ESP page.

Medical Discharge Specify the time limit (in days) for transferring medical discharge data to the social security agency following receipt of a discharge note from an employee. If you select the Add Security Period check box on the Create FDI File ESP page (discussed below), the system compares the date on which the file with the medical discharge note data is transferred to the agency (system date) to the absence end date. If the number of days between the file transfer date and the absence end date exceeds the time limit for medical discharge notes, the system marks the employee as Late on the Create FDI File ESP page.

Confirmation Note Specify the time limit (in days) for transferring confirmation note data to the social security agency following receipt of the note from an employee. If you select the Add Security Period check box on the Create FDI File ESP page (discussed below), the system compares the date on which the file with the confirmation note data is transferred to the agency (system date) to the confirmation date you entered on the Additional Data page. If the number of days between the file transfer date and the confirmation date exceeds the time limit for medical discharge notes, the system marks the employee as Late on the Create FDI File ESP page.

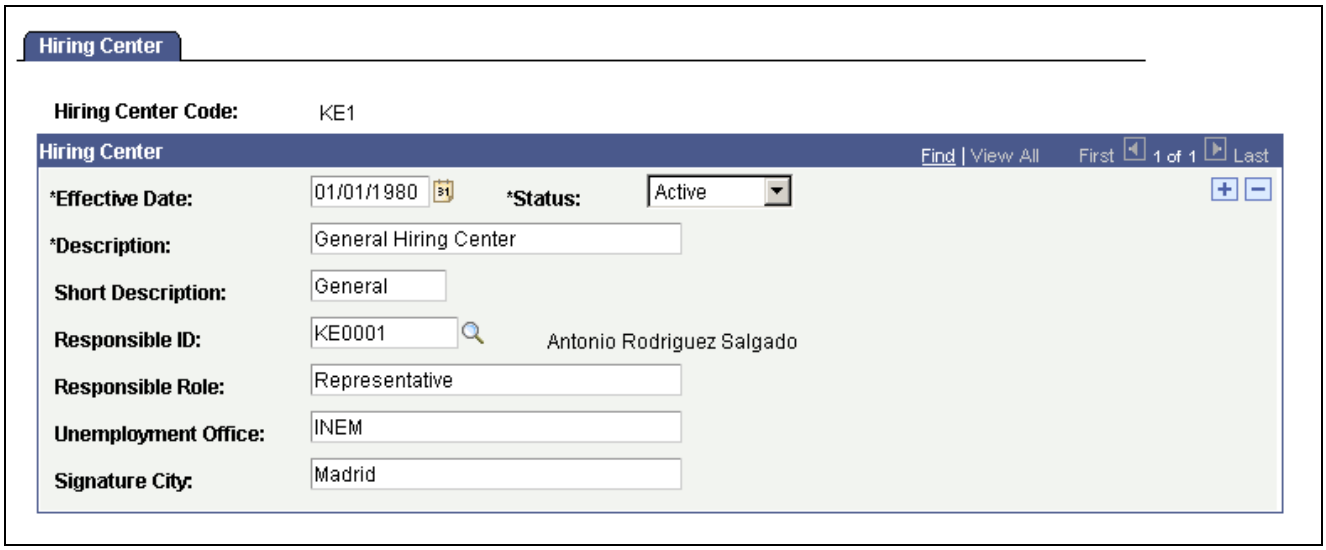
See Also

PeopleSoft Enterprise Global Payroll for Spain 9.0 PeopleBook, "Working with Absence Rules," Generating the FDI Medical Report Text File

Defining Spanish Hiring Centers

Access the Hiring Center page.

Copyright © 1988-2006, Oracle. All rights reserved.



Hiring Center page

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

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

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

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

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

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Working with System Data Regulation in HRMS"

(BRA) Setting Up Brazilian Establishments

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

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

Note. All Brazilian establishments must belong to a company.

This section discusses how to:

- Enter types of establishment ID codes.
- Set up establishments.
- Group establishments for centralized data.

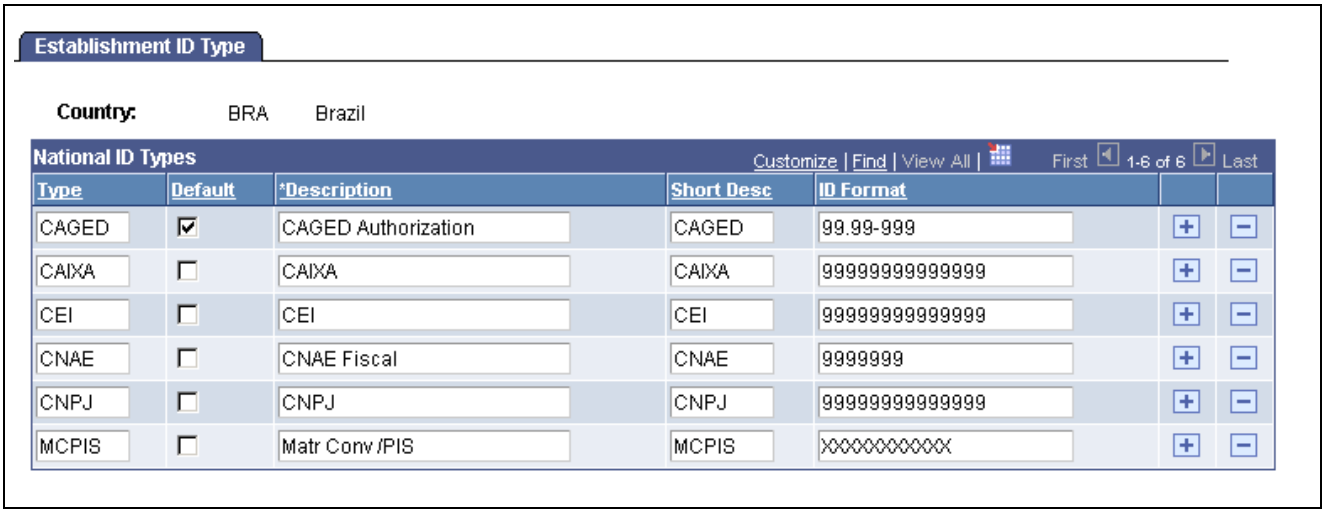
Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Set Up Establishments

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

Entering Types of Establishment ID Codes

Access the Establishment ID Type page.



Establishment ID Type page

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

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

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

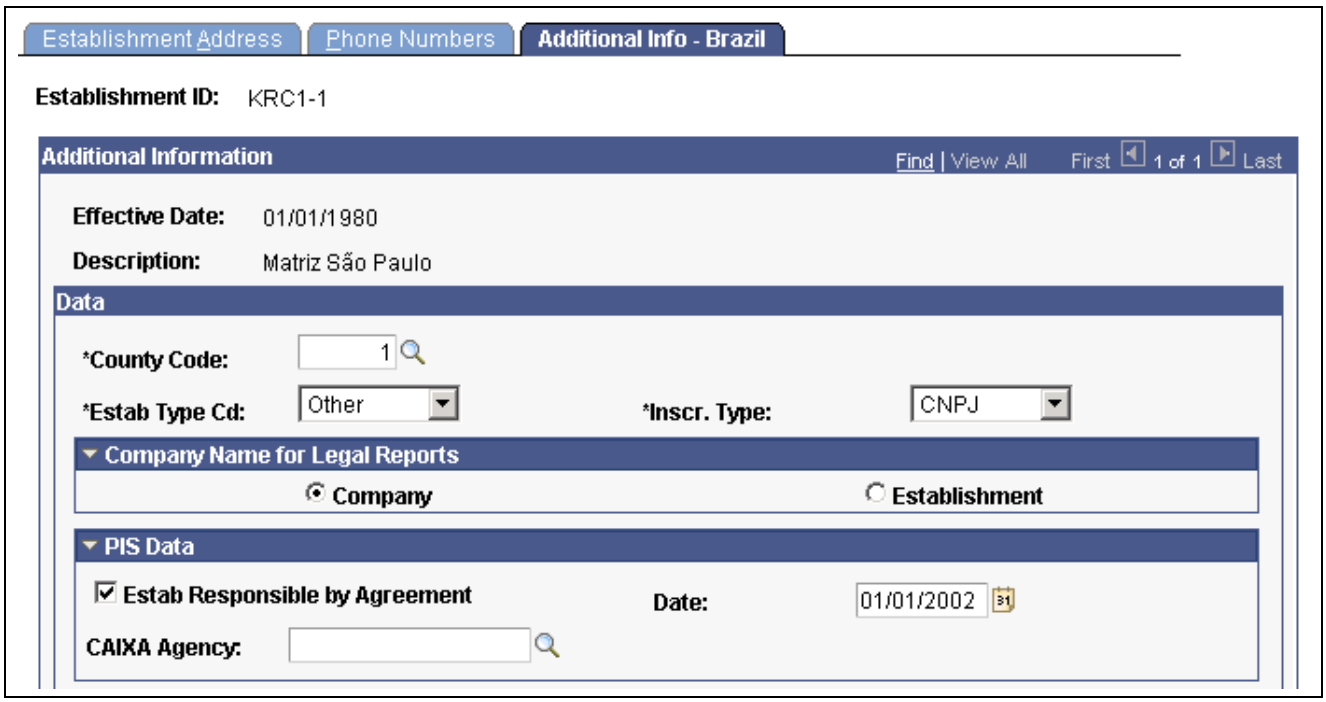
The system has edit masks that apply special formatting to some of the ID types you enter on this page. The system applies the following formatting to these ID types:

- CNPJ: 99.999.999/9999-99
- CNAE: 99.99-9

Copyright © 1988-2006, Oracle. All rights reserved.

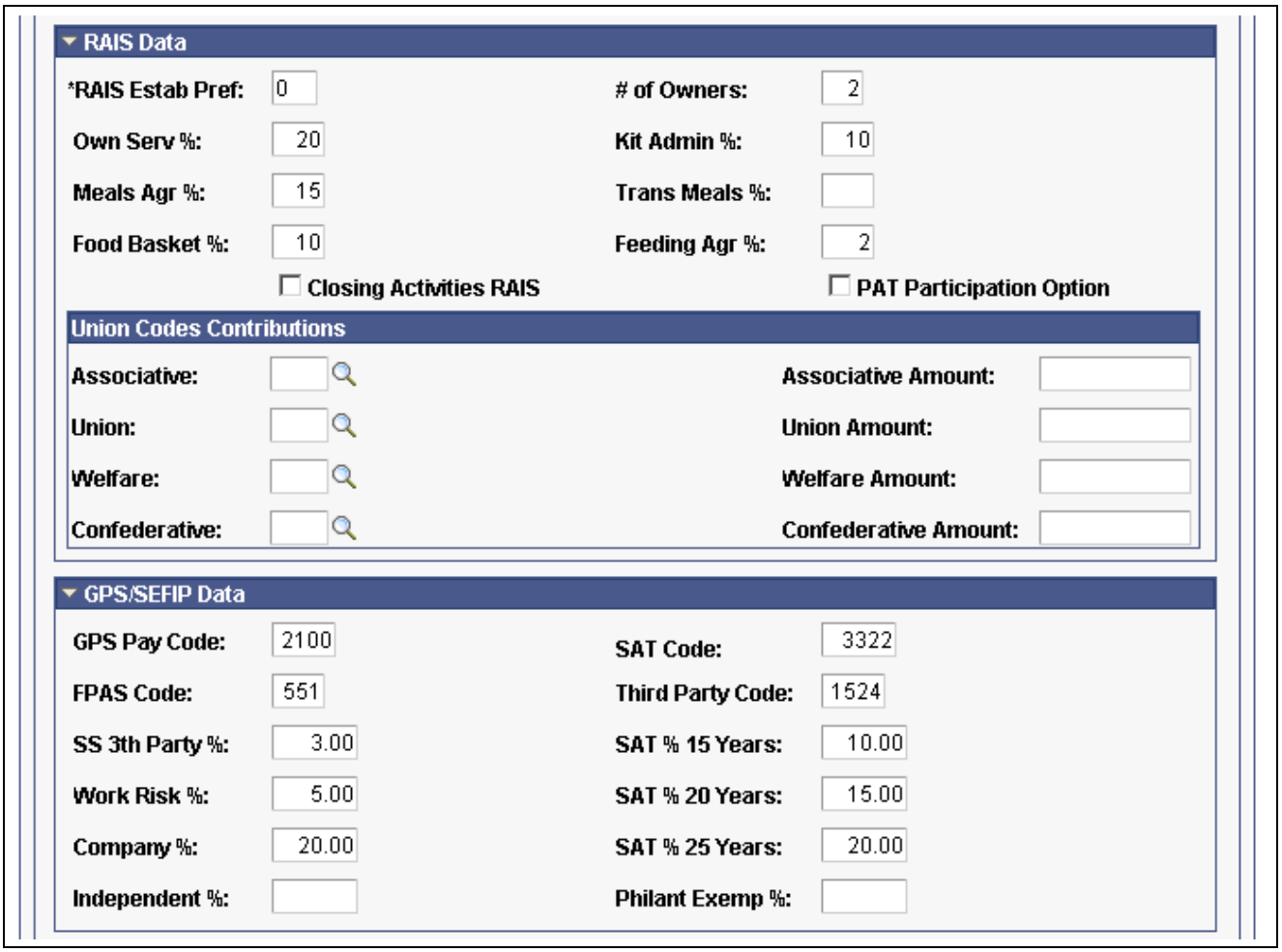
Setting Up Establishments

Access the Additional Info - Brazil page.



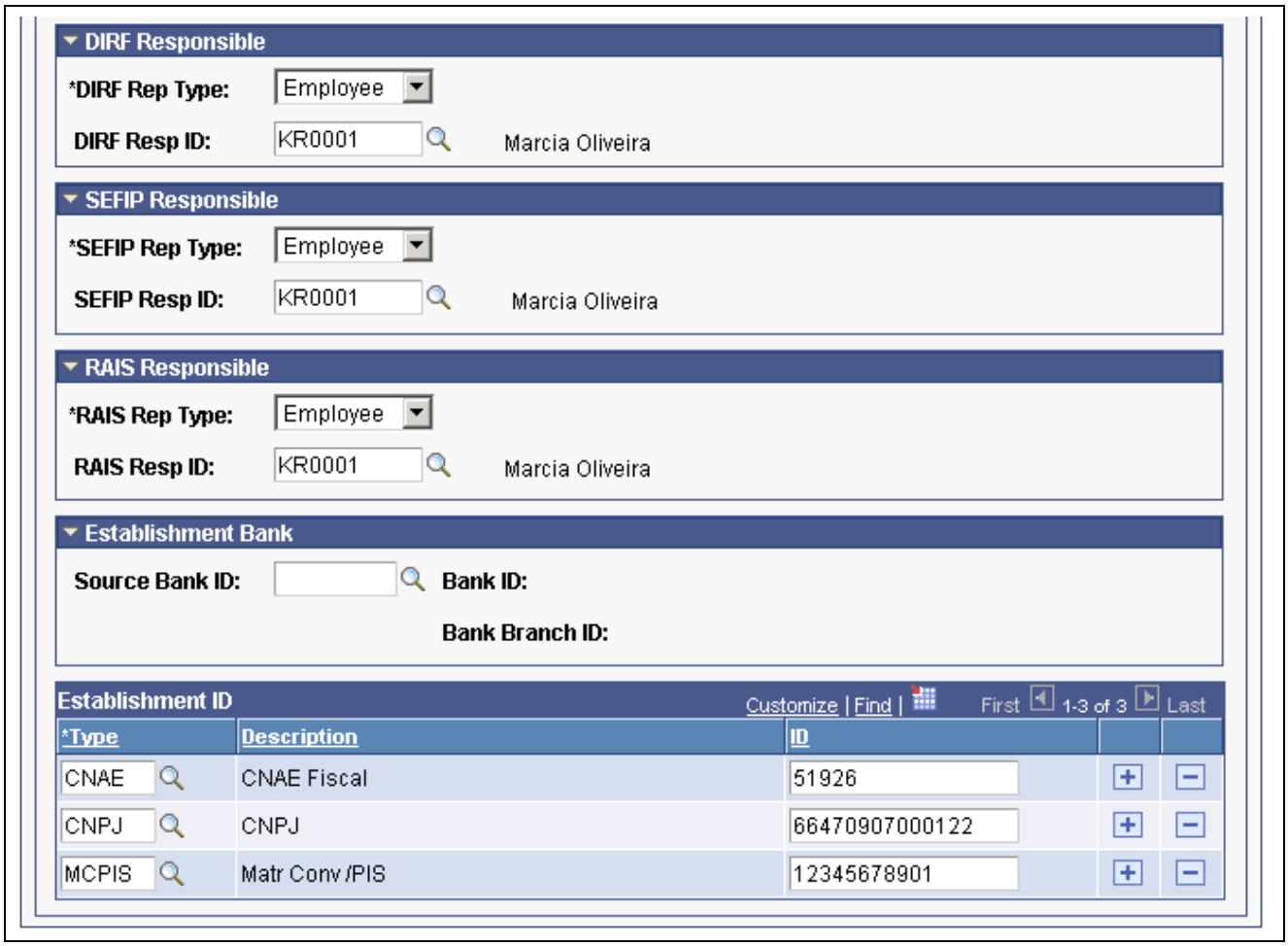
Additional Info - Brazil page (1 of 3)

Copyright © 1988-2006, Oracle. All rights reserved.



Additional Info - Brazil page (2 of 3)

Copyright © 1988-2006, Oracle. All rights reserved.



Additional Info - Brazil page (3 of 3)

County Code Enter the county code.

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

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

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

PIS Data

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

Estab Responsible by Agreement (establishment responsible by agreement) When you select this check box, the CAIXA Agency field appears.

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

Copyright © 1988-2006, Oracle. All rights reserved.

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

RAIS Data

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

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

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

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

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

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

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

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

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

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

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

GPS/SEFIP Data

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

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

SAT Code Enter the work accident insurance code.

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

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

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

Copyright © 1988-2006, Oracle. All rights reserved.

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

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

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

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

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

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

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

DIRF Responsible

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

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

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

SEFIP Responsible

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

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

RAIS Responsible

Complete this group box only for RAIS centralizing establishments.

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

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

Copyright © 1988-2006, Oracle. All rights reserved.

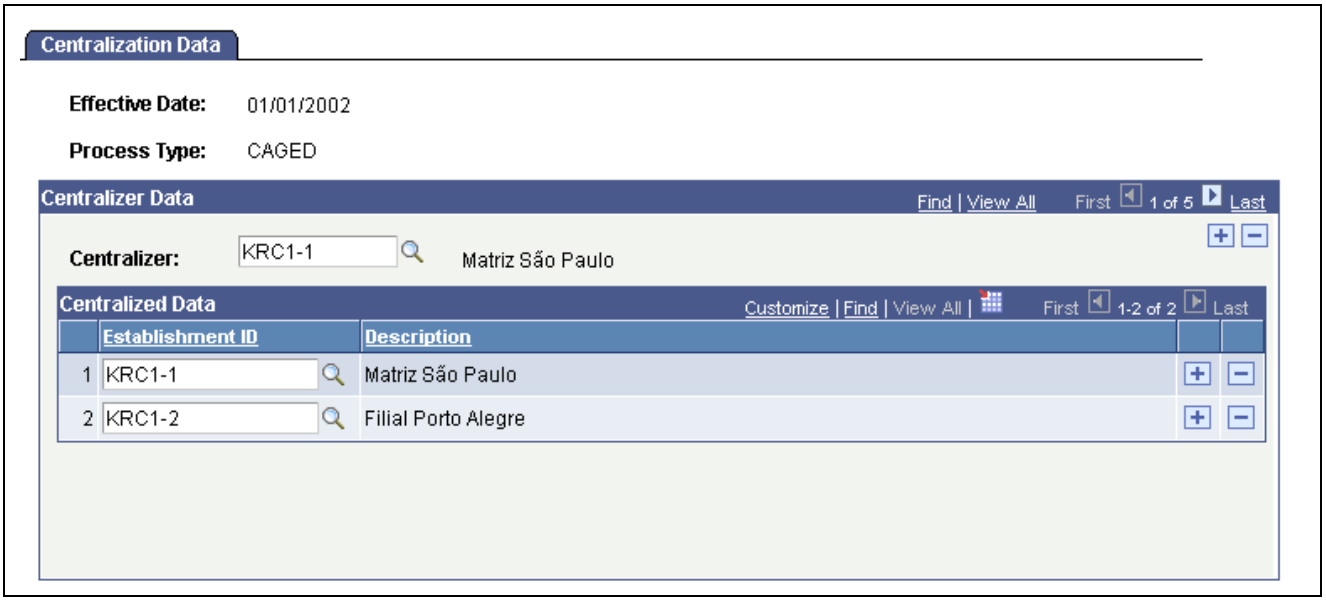
Establishment ID

Type Enter an establishment ID type.

ID Enter the establishment's ID.

Grouping Establishments for Centralized Data

Access the Centralization Data page.



Centralization Data page

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

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

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

Copyright © 1988-2006, Oracle. All rights reserved.

Copyright © 1988-2006, Oracle. All rights reserved.

CHAPTER 4

Understanding Organizational Relationships, Employment Record Numbers, and Multiple Jobs

This chapter provides an overview of organizational relationships and multiple jobs.

Organizational Relationships

Organizations have relationships with a variety of people for a variety of reasons. PeopleSoft enables you to manage the data of those people with whom you have an organizational relationship. A person can have more than one organizational relationship at any one time or can change relationships over time.

Organizational relationships fall into one of the following categories:

- Employee.

  A person who is hired to provide services to the organization and has a legal employee relationship with the organization.

- Contingent worker.

  A person who provides services to the organization and who does not have a legal employee relationship with the organization.

  Note. PeopleSoft Enterprise Payroll for North America does not process payroll for contingent workers.

- Person of interest (POI).

  A person who is not an employee or contingent worker but is of interest to the organization. POIs can be:

  - COBRA participants.
  - Pension payees.
  - Stock - board members.
  - Stock - non-HR administered employees.
  - Global Payroll payees.
  - Campus Solutions persons.
  - External trainees.
  - External instructors
  - Any person who fits within a POI type you've created.
  - Applicants who require payment through Payroll for North America prior to being hired.

Copyright © 1988-2006, Oracle. All rights reserved.

Note. Dependents, beneficiaries, emergency contacts, and health and safety physicians are not captured as POIs.

This chapter refers only to those people with organizational relationships.

Personal Information Data for People with Organizational Relationships

The system requires the same personal information regardless of a person's organizational relationship so all people with an organizational relationship are added to the system using the Personal Data component (PERSONAL_DATA). This enables you to simplify data entry and maintenance and to use a single, unique identification code for people as you add new organizational instances for them or as their relationships to the organization change.

The generic Add a Person component is on the Administer Workforce menu, but there are additional components on the menus of other applications enabling you to create records for people of interest specifically for that application. For example, you can add PeopleSoft Enterprise Global Payroll payees on the Add a POI Payee component (PERSONAL_DATA) on the Global Payroll & Absence Mgmt, Payee Data menu.

Note. Enter people whose relationship to the organization does not constitute an organizational relationship, such as emergency contacts or beneficiaries, on specialized components throughout HRMS.

The identification number can be labeled as EmplID, Person ID, or ID. These fields all refer to the same identification number. Do not assume that a field labeled EmplID refers to employees only.

See Chapter 5, "Adding a Person in PeopleSoft Human Resources," Understanding Identification Assignment, page 109.

Organizational Instances

An organizational instance is a single occurrence of an organizational relationship. After you create a personal information record for a person, create an organizational instance to enter and maintain job records. An organizational instance has its own hire date and contains the accumulation of the person's job data records that are associated with that instance.

Use one of the following components to create an organizational instance:

- New Employment Instance (JOB_DATA_EMP).
- New Contingent Worker Instance (JOB_DATA_CWR).
- Template-Based Hire (HR_TBH_EULIST).

  Note. Templates must be created first before the template-based hire component can be used.

- Add Person of Interest Job Relationship (JOB_DATA_POI).

  Note. Access this component from the Administer Workforce menu when you select a POI type that requires a job record. Otherwise, this component is available, under varying names, on the menus of applications that process POIs with jobs.

 Copyright © 1988-2006, Oracle. All rights reserved.

Note. Hire applicants with data that is in the system by using the Hire component (ER_APP_HIRE_LAUNCH) in PeopleSoft Enterprise Talent Acquisition Manager.

Note. Update and maintain job data for the instances on the Job Data component (JOB_DATA) or Current Job component (JOB_DATA_CURRENT).

Organizational Instances for People of Interest

PeopleSoft delivers a number of different POI types that you can activate and use as needed. The following types require job records:

- COBRA qualified beneficiaries.
- Pension Payees.
- Stock - board members.
- Stock - non-HR employees.
- Global Payroll payees.
- Student refunds.

Some of the POIs you may want to track will not require a job record. If you are tracking POIs without jobs, you will need to use the Add a Person of Interest component (PERS_POI_ADD) to indicate what kind of POI relationship the person has, as well as to enter any necessary security parameters to control access to the person's data.

Example: A Person with Three Organizational Instances

Mario Estevez needs to successfully complete training with a third-party vendor before starting his new position. To reimburse Mario for the cost of the training, he needs a job record. The human resources administrator adds him in the system by using the Add a Person component and assigns him the ID 1234. The administrator then creates a POI job record for him by using the Add Person of Interest Job component.

After Mario completes his training, he joins the company as an employee. The human resources administrator terminates his POI instance (by using the Job Data component) and creates an employment instance by using the Add Employment Instance component.

A little more than a year after joining the company, Mario is given the opportunity to participate in a short-term project. The human resources administrator creates a contingent worker instance for him on the Add Contingent Worker Instance component.

Mario is later transferred and promoted in his employee job, and a new job data row is inserted for each of these changes. The historical job records accumulate under the organizational instance in which they are created. The human resources administrator updates the job records for the employment and contingent worker instances by using the Job Data component.

This table lists the changes to Mario's job records over a four-year period:

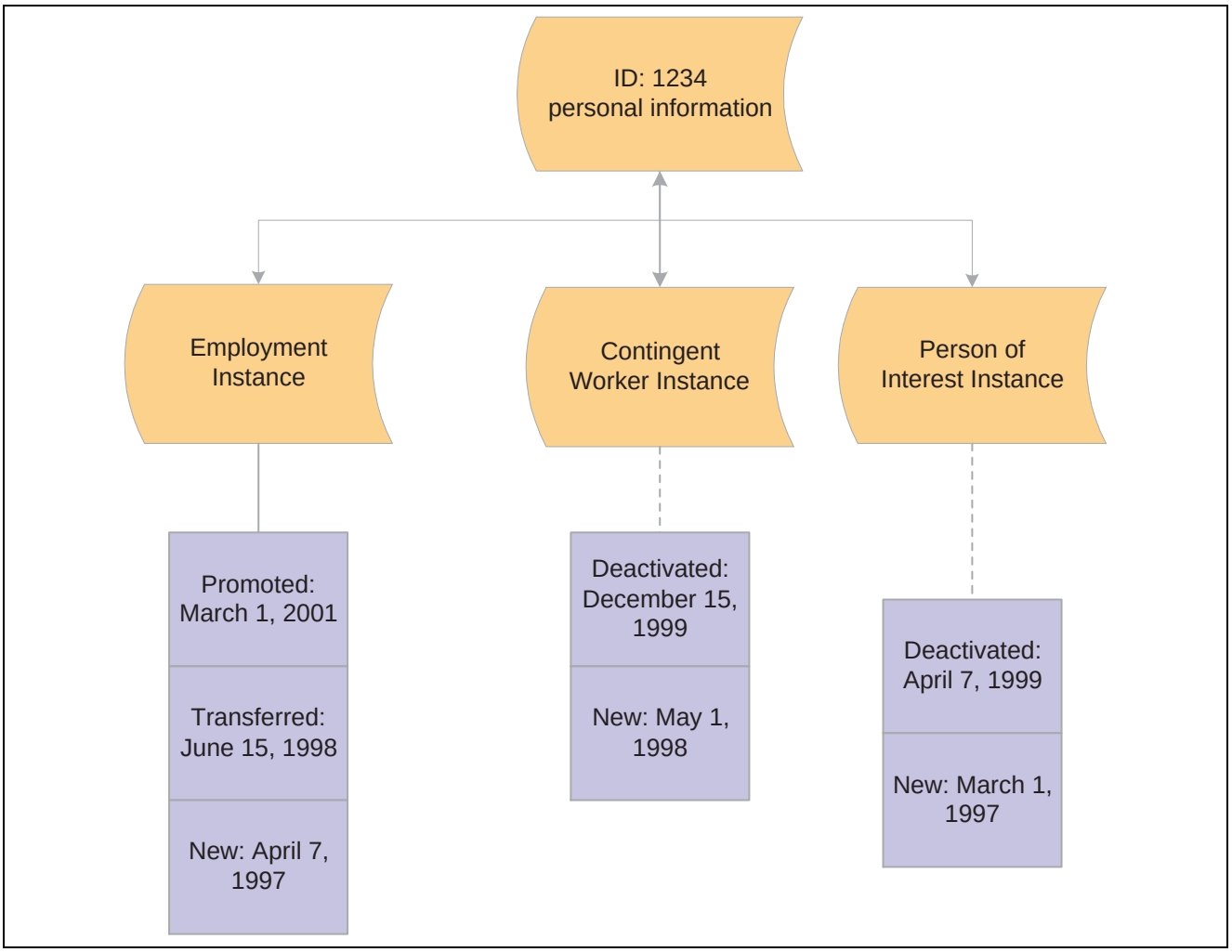
Action Date	Employment Instance	Contingent Worker Instance	POI Instance
March 1, 1997			POI instance created.

Copyright © 1988-2006, Oracle. All rights reserved.

Action Date	Employment Instance	Contingent Worker Instance	POI Instance
April 7, 1997			POI instance job record deactivated.
April 7, 1997	Employment instance created with this date as the hire date.		
May 1, 1998	No change to employment job record.	Contingent worker instance created with this as the hire date.	
June 15, 1998	Transferred departments	No change to the contingent worker job record.	
December 15, 1999	No change to employment job record.	Contingent worker job ends and the job data record is deactivated. This date is the termination date for this instance.	
March 1, 2001	Promoted.		

This diagram illustrates how the system stores Mario's person and job data:

Copyright © 1988-2006, Oracle. All rights reserved.



Mario's employee, contingent worker, and POI instances and the job records that are associated with those instances

Employment Record Numbers

Employment record numbers (ERNs), in combination with a person's ID, uniquely identify a person's job data records. The system distinguishes between a person's organizational instances by using a new ERN when you create a new instance.

The system also creates a new ERN when you create a job data record in the following circumstances:

Copyright © 1988-2006, Oracle. All rights reserved.

Action	Comments
Create concurrent jobs, including: • Additional assignments. • Additional organizational instances. • (JPN) Additional appointment *(kenmu)*. • (CHE) Multicontract.	• Use the Add Additional Assignment component (ADD_PER_ORG_ASGN) to add an additional job (using the action of Add Additional Job) to the one an employee or contingent worker already holds. This job is added to an existing organizational instance, retains the employment dates of the original job, and is terminated if you terminate the original job. **Note.** Access the Concurrent Job Data component (JOB_DATA_CONCUR) from the Add Additional Assignment component. • Use the Add Employment Instance component or Add Contingent Worker Instance component to create an additional organizational instance for a worker using the action Hire. This job record is not tied to any other jobs that the worker holds, has its own job data, and has its own hire dates. HIR is used in the Add Employment Instance only. The Add Contingent Worker Instance component uses the ADD action. **Note.** Additional organizational instances are identified as hires on human resources reports and additional assignments are not. Use this distinction to guide how you enter additional jobs in the system. If you do not need to distinguish between concurrent jobs, choose one method of entering concurrent jobs and use it consistently. See Chapter 6, "Increasing the Workforce," Adding Organizational Instances for Employees, Contingent Workers, and POIs, page 146. See Chapter 6, "Increasing the Workforce," Adding Additional Assignments, page 200. See Chapter 12, "(JPN) Tracking Additional Appointments (Kenmu)," page 477.

Copyright © 1988-2006, Oracle. All rights reserved.

Action	Comments
Create a global assignment (employees only).	Use the Home/Host Information component (HOME_HOST_DATA) to create a global assignment job record. The system gives the global assignment (host) job record a new employment record number to distinguish it from the employee's original (home) job record. See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Track Global Assignments.*
Create a temporary assignment, including Japanese intercompany transfer *(shukkou)*.	When you assign a worker to a temporary assignment on the Job Data component, the system suspends the substantive job and identifies the temporary job record with a new employment record number. See Chapter 8, "Entering Additional Data in Human Resources Records," Entering Temporary Assignments, page 295. See Chapter 13, "(JPN) Tracking Intercompany Transfers (Shukkou)," page 491.

Example: A Person with Multiple ERNs

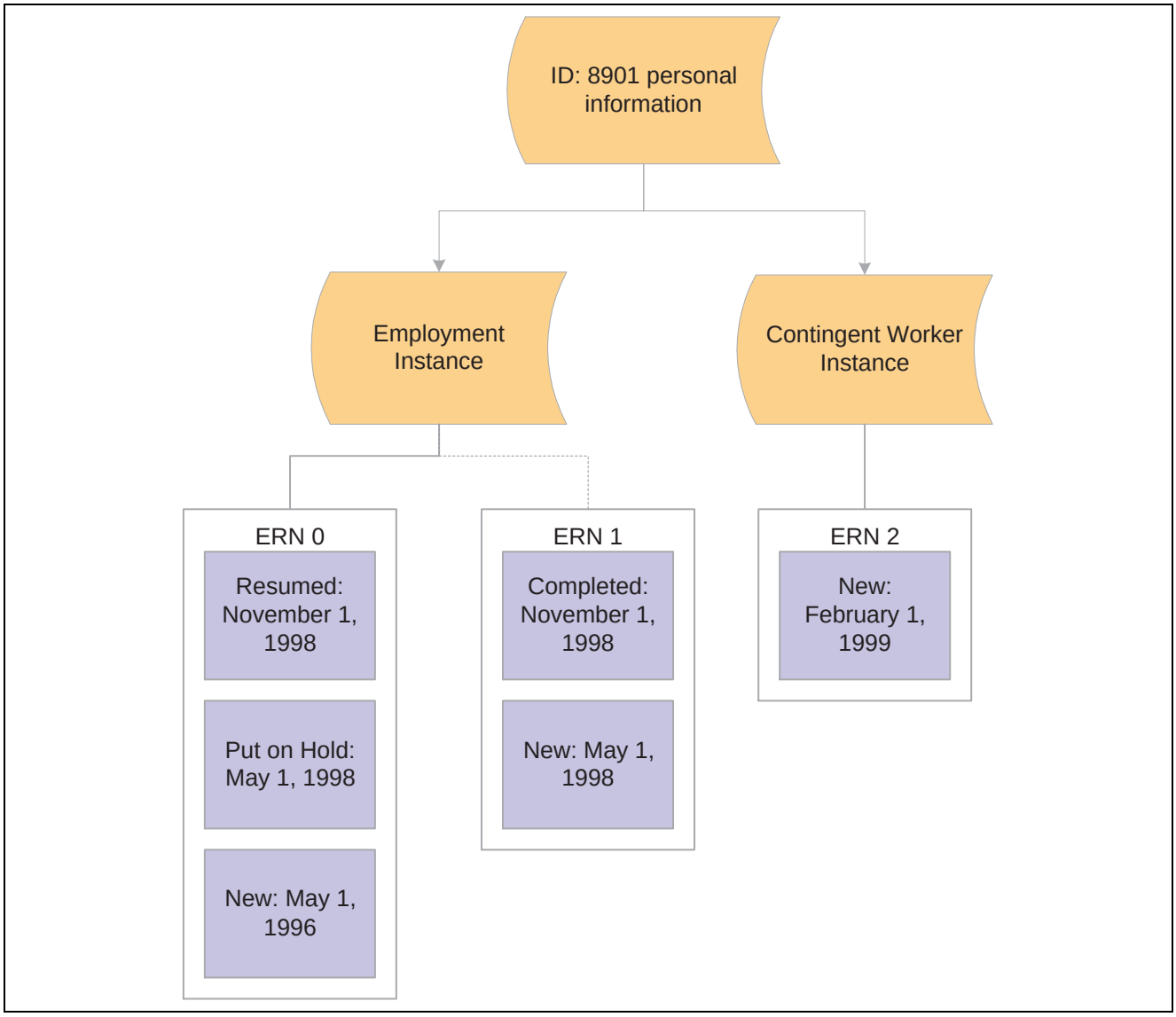
Jan Smith is hired to work in the sales division of Sutter Enterprises. After two years of outstanding performance, she starts a six-month temporary assignment in a subsidiary company to assist with the launch of a new application. At the end of the assignment she returns to her original job, but three months later she takes on a consulting role at the subsidiary in addition to her sales job. This table lists the changes to Jan's job records over the three-year period:

Action Date	Employment Instance	Contingent Worker Instance
May 1, 1996	Employment instance created. Job record identified by: • ID: 8901 • ERN: 0 • Organizational relationship: employee	
May 1, 1998	Substantive job suspended.	
May 1, 1998	New job record for temporary assignment created. Job record identified by: • ID: 8901 • ERN: 1 • Organizational relationship: employee	
November 1, 1998	Temporary assignment completed.	

Copyright © 1988-2006, Oracle. All rights reserved.

Action Date	Employment Instance	Contingent Worker Instance
November 1, 1998	Substantive job resumed.	
February 1, 1999	No change to employment job record.	Contingent worker instance created. Job record identified by: • ID: 8901 • ERN: 2 • Organizational relationship: contingent worker

This diagram illustrates Jan Smith's job records under the organizational relationships:



Jan Smith's job records from May 1, 1996 to February 1, 1999

Copyright © 1988-2006, Oracle. All rights reserved.

Multiple Jobs

Workers who hold more than one active job at the same time under one organizational instance create unique requirements in People Soft Human Resources, Benefits Administration, Payroll for North America, and Pension Administration. If your organization allows a worker to hold multiple jobs, you must be able to:

- Combine the worker's job data to comply with regulatory requirements.
- Determine benefit and pension eligibility.
- Calculate deductions and credits for payroll processing.

This section discusses:

- Multiple employment records compared to multiple jobs.
- Multiple jobs and PeopleSoft Enterprise Human Resources.
- Multiple jobs and Base Benefits.
- Multiple jobs and PeopleSoft Enterprise Benefits Administration.
- Multiple jobs and Payroll for North America.
- Multiple jobs and PeopleSoft Enterprise Pension Administration.

Multiple Employment Records Compared to Multiple Jobs

A person can have multiple ERNs without holding multiple jobs.

A person does not have multiple jobs when they have:

- A contingent worker and an employment instance.

  The two organizational instances have their own job records, each identified by a unique ERN.
- A substantive job and a temporary job where the substantive job is suspended.

People have multiple jobs when they have:

- More than one active contingent worker or employment organizational instance.
- A substantive job and an additional assignment where the substantive job is not suspended.

Note. Multiple jobs processing does not apply to person of interest job records.

Examples of multiple job include these methods:

Copyright © 1988-2006, Oracle. All rights reserved.

Multiple Job Method	Description
Concurrent Jobs (separate job instances)	• Tracks multiple permanent employment relationships. • Each instance is entirely separate – terminating one has no affect on the other. There is no linkage between the two employment records. • Each instance is created with the *HIR* action (or *ADD* if a contingent worker). • Each instance can be of a permanent or a temporary nature. • Each instance has its own payroll and compensation data. Either, both, or none can be paid. • Benefits data can be combined using the Benefits Rcd Nbr. • Both employment record numbers are available for matching processes in PeopleSoft. • Both employment records are active.
Additional Assignment	• The additional assignment is linked to the permanent job (instance). The new employment record is linked to an existing employment records. • The additional assignment is created with the *ADL* action. • An additional assignment can only be active if the first instance is active (Active, Leave of absence, Leave with Pay, Suspended, Short Work Break). • An additional assignment is automatically terminated when the main instance is terminated. The new employment record can only be active during the time period that the existing employment records is active. • An additional assignment can be completed and reactivated at any time during its controlling instance's active status period. • An additional assignment must be of the same organizational relationship type as its controlling instance. • An additional assignment can be promoted to its own instance if needed (but the history of its linkage to the original instance is lost). • Both employment records are available for matching processes in PeopleSoft. • Either, both, or none can be paid. • Both employment records can be active at the same time.

Copyright © 1988-2006, Oracle. All rights reserved.

Multiple Job Method	Description
Global Assignment	• Tracks temporary assignments while maintaining the employee's relationship with their home (or permanent) job. • Provides additional information tracking for vehicles, dependents, schools, homes, travel details, and additional earnings and deductions. • The additional (host) assignment is linked to the home job. The new employment record is linked to an existing employment record. • The host assignment is created with the *ASG* action. • A host assignment can only be active if the home instance is active. • A host assignment is automatically terminated when the home instance is terminated. If the existing employment record is terminated, this new one is terminated as of the same day. • A host assignment can be completed and reactivated at any time during its controlling instance's active status period. • A host assignment is only available for the Employee relationship. • A host assignment can be promoted to its own instance, but the history of its relationship to the original home instance is lost – except within the actual Track Global Assignments Assignment record. • Host assignments do not have their own compensation data. • Both jobs are available for matching. • Both employment records are active.
Temporary Assignment	• Enables the tracking of temporary assignments while maintaining the employee's relationship with their permanent job. • The original instance is copied to a temporary employment record and is put in a suspended status. Changes can still be applied to this suspended assignment including position incumbent updates – but payroll is never run on this assignment. Only the temporary employment record can be paid. • The temporary assignment data is loaded into the original instance employment record. • When the temporary assignment ends, the suspended instance data is copied back into the original employment record from its latest effective date (only the latest effective date row is copied – the history of changes made to it are still kept in the suspended employment record, like a mass pay change). • The data on the existing employment record is suspended for the duration of the temporary one.

This chart provides information about multiple jobs methods and the relationship between the initial job instance and the concurrent job:

Copyright © 1988-2006, Oracle. All rights reserved.

New Assignment Type	Both Jobs Can Be Active	Primary Instance (Home) Must Be Active	Both Jobs Can Be Paid	Job History	Job Status Automation Process	Both Can Be Matched in the Career Matching Processes
New Instance	Yes	N/A	Yes	Separate	No	Yes
Additional Assignment	Yes	Yes	Yes	Separate	Additional job is terminated if the primary instance is terminated	Yes
Global Assignment	Yes	Yes	Home only	Separate	Host is terminated if Home is terminated.	Yes
Temporary Assignment	Yes	No – Temporary assignment only	Temporary only	Temp data is captured in Instance History	Suspended job can be automatically reactivated when the temporary is done.	No

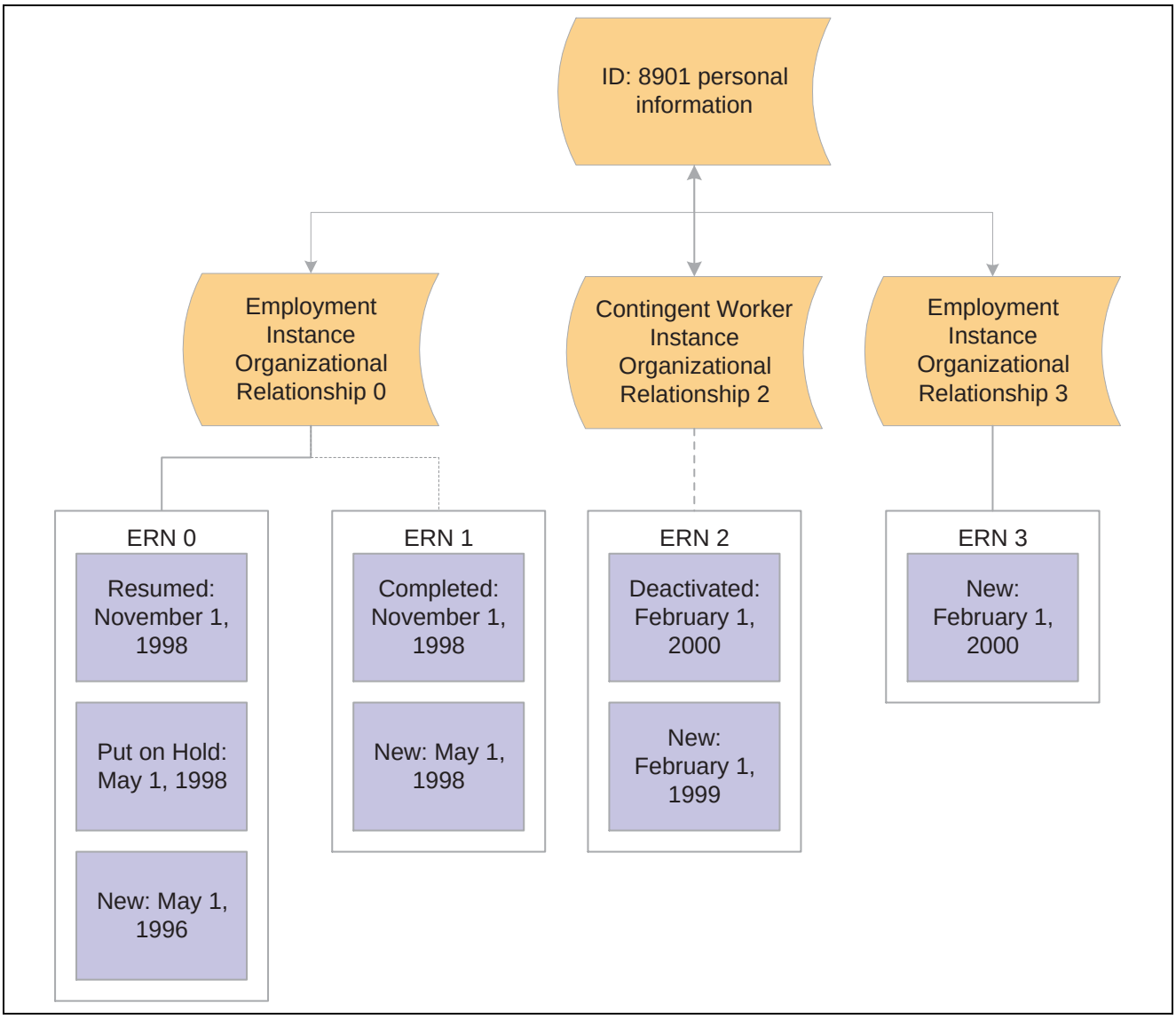
See Chapter 4, "Understanding Organizational Relationships, Employment Record Numbers, and Multiple Jobs," Multiple Jobs, page 95.

Example: A Person with Multiple Jobs

As of February 1, 1999, Jan Smith does not have multiple jobs. She has an active employment job record and an active contingent worker job record, distinguished in the system by their ERNs. After holding the consulting job at the subsidiary company as a contingent worker for a year, management decides to make the job permanent. This requires creating a new employment job record in addition to the original job record. Jan Smith now has multiple jobs.

This diagram illustrates Jan Smith's organizational relationships and job records as of February 1, 2000:

Copyright © 1988-2006, Oracle. All rights reserved.



Jan Smith's job records from May 1, 1996 to February 1, 2000

Multiple Jobs and PeopleSoft Human Resources

When a worker holds multiple jobs, each job must have its Job Data record. When you enter an additional job, you need to make two decisions:

- For reporting purposes, which of the worker's jobs is the primary job.

  You don't have to designate a primary job, but you may want to, to ensure accurate affirmative action statistics and other data that is required for government reporting.

- Whether the worker's jobs will share a benefits program or have separate benefits.

  The system provides flexibility in mixing and matching jobs and benefits programs.

In other ways, PeopleSoft Human Resources treats an additional job the same way that it treats the worker's first job.

Copyright © 1988-2006, Oracle. All rights reserved.

Maintain Multiple Concurrent Military Ranks

PeopleSoft enables customers to track multiple and concurrent job employment through Administer Workforce job data. For military organizations this means the system maintains and manages multiple concurrent ranks for a single service member with concurrent jobs. This functionality enable organizations to track multiple jobs and ranks through one of or a combination of the following examples:

- Concurrent jobs or new instance – two or more separate permanent employment instances not related to each other.

  For example, a service member has responsibilities in two separate departments: two positions in two departments. This is common in staff positions.

- Additional assignments – the new employment record is linked to an existing employment record where the additional job is only active if the primary employment instance is active.

  For example, a Maritime Patrol Aircraft service member is also Safety Officer within the same unit. Here the member has two jobs in the same department; this is referred to as "collateral duty."

- Temporary assignments – track temporary assignments while maintaining the employee's relationship with their permanent job which is copied to a temporary employment record and put on a suspended status. When the temporary assignment ends, the suspended instance resumes as it did before the temporary assignment began.

  For example, a service member goes out for an assignment or training and then comes back to the original, permanent duty station job.

Multiple Jobs and Base Benefits

Some of the issues regarding the PeopleSoft Human Resources Base Benefits business process and multiple jobs are:

- Which job is the worker's main, or primary, job?
- Which jobs do you look at for benefits eligibility, and how should they be evaluated?
- Which jobs are used for calculating deductions and contributions?
- How are the deductions or contributions calculated?
- When do you take deductions and when do you apply credits?

Designate the Primary Job for Benefits

You may want to base a worker's eligibility for benefits on a single job. This is called the *primary job* (not to be confused with the primary job for PeopleSoft Human Resources reporting purposes). The system also uses the primary job to associate payroll deductions for benefits with a specific job. Each benefit record number (group of jobs) that you designate for a worker has one job designated as the primary job.

When you create a job record for a person, the system flags that job as *primary* based on rules that you have set up. This flag is stored in the Primary Jobs Flag page (BN_PRIJOBS_MAINT). As you create other Job Data records for a person, the system turns this flag on or off based on the rules that you have established.

For example, here is what the Primary Job Flag page would look like for an employee who is a professor and dean at a university and a doctor at the university hospital:

 Copyright © 1988-2006, Oracle. All rights reserved.

Job Title	Employee Record Number	Benefit Record	Primary Job?
Professor	0	0	Yes
Dean	1	0	No
Physician	2	1	No

The primary job flag is used throughout the system to:

- Determine when a deduction should be taken.
- Identify the job that will provide the service date and the termination date.

The designation of a worker's primary job is effective-dated and can be changed anytime from a data maintenance page. Also, because the action of starting a new, concurrent job or terminating an existing job usually affects the determination of the worker's primary job, you can define rules that redesignate the primary job when one of these job actions is entered into the system.

For other actions (such as a job moving from full-time to part-time status), you can also indicate whether the system sends a work list entry to the Benefits Administrator through PeopleSoft Workflow for review.

Group Jobs to Determine Benefit Eligibility

When workers hold multiple jobs, they may be eligible for different offerings of benefits, based on the combination or mix of the jobs that they hold. Conversely, they may be eligible for certain offerings based solely on the fact that they hold a particular job.

Multiple jobs introduce the concept of a *benefit record number.* If an worker is eligible for multiple sets of benefits (or possibly multiple benefit programs), then you enroll the worker in those benefits according to the set of benefits that corresponds to a grouping of one or more jobs. The benefit record number is the mechanism that is used to group concurrent jobs for benefits eligibility and enrollment purposes.

All enrollments for benefits are specific to a benefit record number.

Maximum Number of Concurrent Jobs

A worker can hold a maximum of 50 concurrent jobs across all benefit record numbers. PeopleSoft Payroll for North America can process only 50 benefit record numbers on one paycheck.

Calculate Benefit Deductions

The same grouping method that is used to determine eligibility can be used to calculate deductions. You can group jobs to calculate a deduction that is based on the worker's salary. Typically this involves calculating coverage and related premiums for Life and Disability plans that are based on the worker's salary or compensation rate. You calculate the coverage and deduction based on:

- The salary of the primary job.
- The summed salaries from a group of jobs.

Copyright © 1988-2006, Oracle. All rights reserved.

When you designate the primary job for a benefit record, the system ties all deductions for the benefits that are associated with this benefit record to this job. Benefits deductions are taken only from checks by which the associated primary job is paid. This assures that deductions are taken at the proper frequency when the individual jobs in a group are paid on different frequencies or on separate checks.

When jobs are combined into a single check for all benefits record numbers, the benefits deduction for the different benefit record numbers is printed as separate detail lines.

Apply Regulatory Contribution Limits

When applying regulatory limits to contributions for savings plans, the system takes into account all earnings and deductions that the worker has across multiple jobs, not just the job or jobs that are associated with the plan that is being limited.

The Retro Deduction and Imputed Income Adjustment processes reevaluate deductions over a specified period of time. Using the current state of the database (benefit and general deduction enrollments, job history and primary job assignment), the system recalculates deductions and compares them to the deductions that were originally calculated and taken.

The primary job indicators play an important role in the calculation of deductions. If changes are made to the primary job history that affect confirmed pay periods, and these changes involve a shift of pay frequencies, then the system might calculate a different deduction amount for this period than it originally calculated. During Retro Deduction and Imputed Income Adjustment processing, the system drives the calculation off the primary job history for the adjustment period.

Percent of Gross Deduction Limits

Calculation rules can be set up with a percent of gross limit applied to a benefit deduction. Also, rate tables can specify the portion of a deduction that is subject to this percent of gross limit. Now that earnings from multiple jobs with different benefit record numbers can be combined into a single check, this can result in a different gross earnings amount being calculated than when these jobs were not combined into a single check.

When applying the Percent of Gross limit to a deduction, the system uses the entire gross earnings from the check, as opposed to just the gross earnings that are attributable to the jobs with the same benefit record number as the enrollment for the deduction that is being limited. This can result in different deduction amounts being calculated than were previously calculated.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Benefits, "Managing Multiple Jobs"

Multiple Jobs and PeopleSoft Benefits Administration

The major impact that multiple jobs have on PeopleSoft Benefits Administration is on benefit eligibility and event triggering. Considerations are:

- Which jobs do you look at for benefits eligibility, and how should they be evaluated?
- If a change affects one job, how do you determine the effect that it has on the other jobs?

Determine Eligibility with Multiple Jobs

The system uses Eligibility Rules to determine if a worker meets the organization's rules for enrollment in a benefit program or option. Eligibility Rules comprise three major components:

- Eligibility Criteria.
- Grouping Method.

 Copyright © 1988-2006, Oracle. All rights reserved.

- Evaluation Method.

Each component is tied to an Eligibility field within an Eligibility Rule. The Eligibility Criteria field defines the data values that determine eligibility or ineligibility. The status of the worker's Primary Job indicator and Include for Eligibility check boxes on the Primary Jobs table, together with the Grouping Method and Active Only fields, define which jobs should be evaluated. Finally, the Evaluation Method component defines how the group of jobs should be evaluated.

With multiple jobs, you specify a Grouping Method. Grouping Method enables you to define which jobs to include when the system is evaluating the benefits for which an employee is eligible:

AllFlagged Groups all jobs with the Include for Eligibility flag on Primary Jobs that are selected for all benefit record numbers.

Flagged BR Groups all jobs with the Include for Eligibility flag on Primary Jobs that are selected within the benefit record number of the event.

Primary Looks at only the primary job within the benefit record number of the event.

When determining which jobs should be grouped, the Active Only check box from the eligibility rule is also used. If this flag is ON, then only those jobs with an active Empl_Status (employee status) of A, L, P, W, or S are included when the Grouping Method is All Flagged or Flagged BR.

Another component of the eligibility rule is Evaluation Method. Evaluation Method enables you control how the jobs that are selected from the grouping method are evaluated against the eligibility criteria, when determining whether the employee satisfies the eligibility rule:

One or More At least one job in the group must satisfy the rule.

All All jobs in the group must satisfy the rule.

Sum The sum of the eligibility field's data value from all jobs in the group must satisfy the rule.

For example, the table below lists the eligibility of the employee with three jobs when processing an event for Benefit Record 0 and the Eligibility Rule for the FTE file is:

- Minimum FTE must equal *1*.
- Grouping Method is AllFlagged.
- Active Jobs Only flag is *Y.*

Job	Employee Record #	Benefit Record #	Primary Job	Include for Eligibility	Include for Deductions	FTE
Professor	0	0	Yes	Yes	Yes	.50
Dean	1	0	No	Yes	Yes	.25
Physician	2	1	Yes	Yes	Yes	.25

All jobs are active, so the group consists of all the jobs. The FTE adds up to 1.0 across these jobs, so this employee meets the eligibility rule.

Copyright © 1988-2006, Oracle. All rights reserved.

Suppose that the Grouping Method is All Flagged BR. Then the group of jobs you evaluate is Empl_Rcd (employee record) 0 and Empl_Rcd 1. The sum of these FTE fields is .75, which does not meet the eligibility criteria.

Benefits Credits and the Primary Job

PeopleSoft Benefits Administration posts credits for benefits to the Additional Pay tables under the employee record number that is equal to the benefit record number. During a pay calculation, the system loads deductions for benefits only if the primary job for the benefit record is being paid on the check that is being calculated. Likewise, when loading additional pay for benefits credits, the credits posted under any employee records number for a particular benefit record are loaded to the paysheet of the primary job only for that benefit record.

This means that during a pay calculation, the system (while processing a particular job) determines whether this is the primary job for the associated benefit record number. If it is, the system searches for the additional pay data, looking for benefits credit entries, for example Add'l Pay Reason = 'BAS' for *any* Empl_Rcd that is assigned to this benefit record.

All entries found are loaded to the paycheck. If this is not the primary job, no benefit credits are added to the check. This ensures that there is no "double dipping" of deductions and that the credits for benefits always appear on the same check as the corresponding deductions.

Trigger Events with Multiple Jobs

The primary job drives the processing of an event for a specific benefit record number. This job must have a benefit system flag set to BA - Benefits Administration. The primary job provides the company ID and the BAS Group ID data for the processing schedule.

There are three main categories of events:

- Events that are triggered though a direct change to employee data.
- Events that are inserted into the system manually on the BAS Activity page.
- Passive events.

If changes are made to a worker's job data that impacts the worker's primary job designation, Include for Eligibility flag, or Include for Deduction flag, the system generates an entry into the BAS Activity Table for a new type of trigger, the (MJ) MultiJob trigger. These triggers are generated with a Bas_Action code of MJC (MultiJob Change), which resolves to the system Miscellaneous Event, if a specific Event Class is not set up for this Bas_Action code. Events that are created as a result of a change to the Primary Jobs table process through the system as (MSC) Miscellaneous Events.

Some of these trigger types may affect a worker's eligibility for benefits across all Benefit Records. For example, the (TP) trigger (Pers_Data_Effdt) is generated when you change a worker's address. Because the Employee Address is not related to any particular job (or benefit record), this change could affect the eligibility for benefits across all of that worker's benefit records. Changes to the worker's age are not specific to a particular job. Because these types of changes can affect all benefit records for a worker the system creates an event for each benefit record that is held by the worker when it processes one of these triggers. This is also true for Passive Birthdate (PB) triggers that are generated as a result of processing Passive Events.

The system explodes the original trigger into a set of new triggers, one for each benefit record. You won't see these exploded triggers in the BAS Activity Table, because they're normally processed in the same Event Maintenance run in which they're created. Each exploded trigger generates a new event that has the same event class as the original trigger.

Other expanded triggers are generated as a result of the options that you configure. Because you can define eligibility rules with grouping methods that cross benefit record boundaries, you can't assume that the data changes that generate other types of triggers won't affect other benefit records.

 Copyright © 1988-2006, Oracle. All rights reserved.

For example, suppose that you change the example employee (professor/dean/physician) from Full Time to Part Time in one job. The three concurrent jobs provide multiple benefit records. As a result of changing the Full/Part Time indicator, the system generates a (TJ) Job trigger in the BAS Activity Table. This trigger contains the employee record and the corresponding benefit record of the job that is changed. If any eligibility rule uses a Grouping Method of *All Flagged,* meaning that jobs from any benefit record can contribute eligibility information for this benefit record, you need to expand these triggers. Carefully consider whether you want to activate this trigger explosion. It creates some overhead for the system to maintain and process. If you have eligibility rules that cross benefit record boundaries, then you should select Job Triggers, Passive Service Triggers, and Multi-Jobs Triggers in the Explode activity triggers to all Benefit Records group box on the Multiple Jobs Options page. If you have no such eligibility rules in your system, you can safely turn off the explosion for each trigger type.

Passive Events and Multiple Jobs

Service-based eligibility is based on the service date for the primary job. Because jobs outside of specific benefit records can be grouped, eligibility that is based on the service date can come from the primary job or from any other job in or outside a benefit record number. Therefore, the system creates a BAS Activity trigger for each job that it finds during Passive Event processing that meets the passive service evaluation. These are called PS triggers.

Mark Events for Reprocessing

The system can now better identify events that should be considered for reprocessing. In prior versions, events were flagged for reprocessing consideration when a Bas_Activity trigger was processed, and events existed that used a later Job or Pers_Data_Effdt row for eligibility purposes. In the prior versions, only one Job row could contribute to eligibility, so in the event that Standard Hours was changed on the “non-primary” Job row, and standard hours accumulation was used for eligibility, the system would not detect that existing events may need to be re-processed. This flagging mechanism searches for, and flags all events for the employee that may have used the Job row indicated in the trigger. Although the system can’t be sure that the Job row was used for eligibility purposes, it eliminates the risk of not flagging an event that should be considered for reprocessing.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Benefits, “Managing Multiple Jobs”

PeopleSoft Enterprise Benefits Administration 9.0 PeopleBook, “Defining Eligibility Rules,” Setting Up Eligibility Rules

Multiple Jobs and PeopleSoft Payroll for North America

The multiple job functionality has the following effect on PeopleSoft Payroll for North America:

- Primary Pay Group

  When an worker has jobs in more than one pay group, you can designate a primary pay group that controls when deductions are taken from the worker’s earnings and when instructions for deduction overrides apply. The worker’s primary pay group is also the pay group for which a consolidated paysheet is built, if you activate the single check feature described below.

- Single Check

Copyright © 1988-2006, Oracle. All rights reserved.

If you activate the Single Check for Multiple Jobs feature in PeopleSoft Payroll for North America, you can produce a single check for workers with multiple jobs across pay groups within the same company. During the Paysheet Calculation process, the system creates a consolidated paysheet for the worker's primary pay group. The paysheet includes all of the worker's FLSA (Fair Labor Standards Act) calculations, taxes, benefits, and general deductions for all jobs with the same period end date; check date; FLSA period, if applicable; and payroll cycle (on- or off-cycle). Pay run IDs and pay frequencies that are associated with the jobs can differ.

- Deduction Limits

  Limits for general deductions and benefit deductions can vary by job. PeopleSoft Payroll for North America adjusts the Current Goal Balance for the appropriate jobs when deductions are taken.

- Union Dues

  Union dues are deducted from earnings only when the job that's assigned the corresponding union code is paid.

- FLSA Overtime Rules

  PeopleSoft Payroll for North America fully complies with FLSA overtime rules for non-exempt workers. If a non-exempt worker has other exempt or non-exempt jobs in the same organization, the system calculates the correct overtime for any extra hours worked.

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook

Multiple Jobs and PeopleSoft Pension Administration

PeopleSoft Pension Administration supports the use of multiple concurrent jobs, instead of relying on Employment Record number 0 for much of the information that is used in the pension benefit calculations.

Multiple Jobs and the Eligibility Process

The eligibility process always produces two primary results:

- Confirmation of whether a worker has ever been eligible for pension benefits.
- Time line showing the periods of eligibility and ineligibility.

For a single-job environment, producing these results is a matter of examining a worker's only job record history. If a worker has multiple, concurrent jobs, the system determines plan eligibility based on all jobs. The system considers the worker to be eligible for a particular period if any of the jobs are eligible.

Multiple Jobs and the Primary Job Record

The system examines all of a worker's records and selects a primary record by choosing the first record that it finds in the following prioritized order of categories:

1. Overrides
2. Covered Active
3. Covered Inactive
4. Any Active
5. Any Inactive

If it finds more than one of any of these categories, it selects the lowest-numbered record in that category.

 Copyright © 1988-2006, Oracle. All rights reserved.

You can accept the system-calculated primary record or override it with your own definition of which job record should be the primary record. Do this by configuring your definition of which actions make a job active or inactive or by using the Primary Job Overrides page to designate a record of your own choosing as the primary record.

See Also

PeopleSoft Enterprise Pension Administration 9.0 PeopleBook

Copyright © 1988-2006, Oracle. All rights reserved.

 Copyright © 1988-2006, Oracle. All rights reserved.

CHAPTER 5

Adding a Person in PeopleSoft Human Resources

This chapter discusses how to:

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

Adding a Person

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

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

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

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

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Understanding Identification Assignment

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

- Automatically

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

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

  See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HRMS," Specifying the Starting Number for System-Assigned Numbers.

- Manually

Copyright © 1988-2006, Oracle. All rights reserved.

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

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

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

Common Elements Used in This Component

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

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

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

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

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

Military Status — Enter the person's military status.

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

Pages Used to Add a Person

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

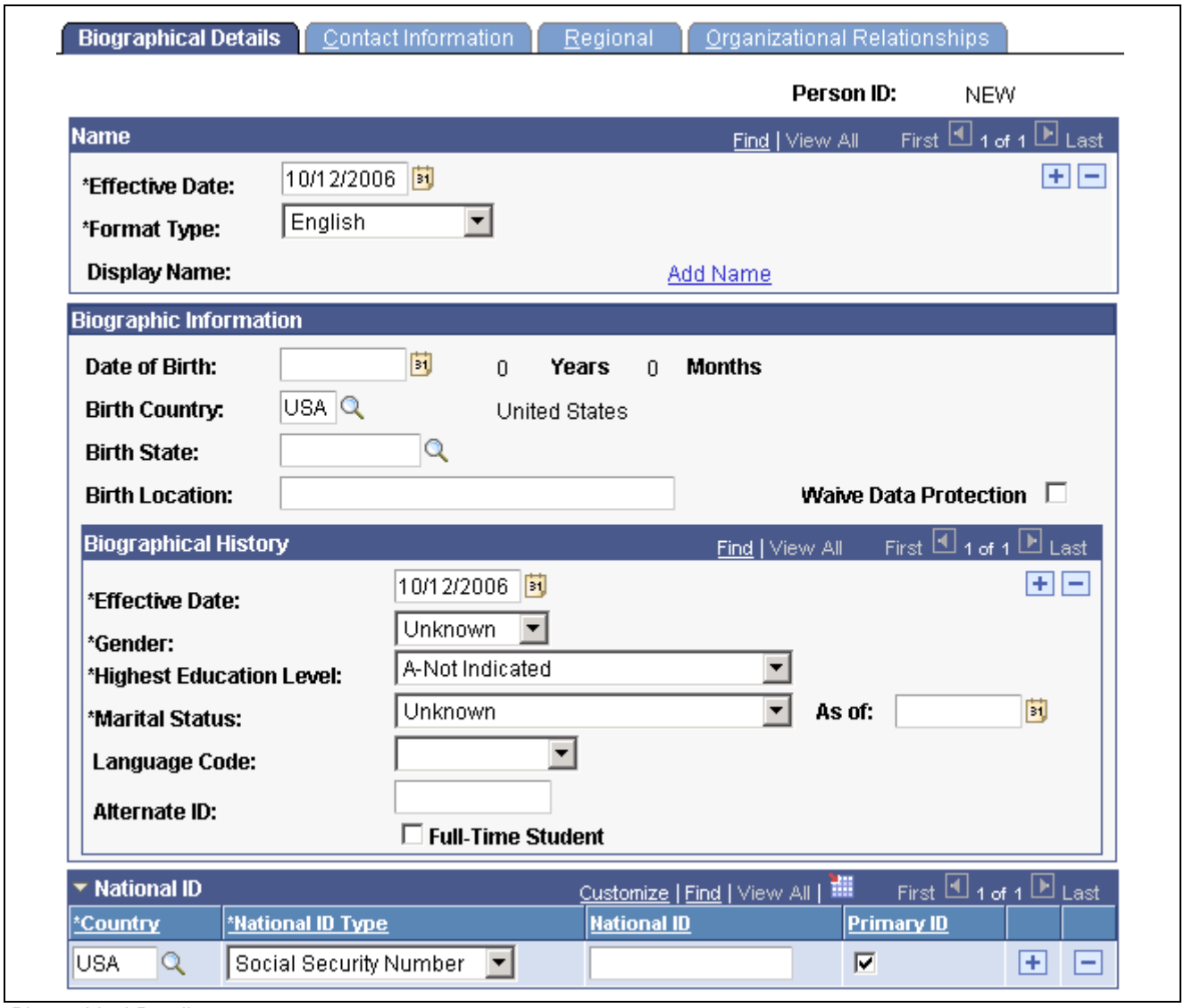
Copyright © 1988-2006, Oracle. All rights reserved.

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

Entering Name and Biographical Data

Access the Biographical Details page.

Copyright © 1988-2006, Oracle. All rights reserved.



Biographical Details page

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

Name

Display Name Click to add or edit a name.

Biographic Information

Date of Birth Enter the person's date of birth. If you leave this field blank, a warning message appears when you save the record. You can continue entering information after you acknowledge the message. Though the birth date isn't required for the Administer Workforce business process, the system uses it to calculate a person's age in some benefit and payroll tasks. It also calculates dates, such as the U.K. expected retirement date, based on the person's age.

Copyright © 1988-2006, Oracle. All rights reserved.

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

Birth Location Usually a city, town, or village.

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

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

Biographical History

Highest Education Level Select a value.

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

Marital Status and **As of** Select the person's marital status. Values are: *Common Law, Divorced, Head of Household, Married, PACS,* [(FRA) This field is used in France. *Pacte civil de solidarite*] *Separated, Single, Unknown,* and *Widowed.* When a marital status is changed, the default as of date is the same as the biographical history effective date.

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

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

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

Copyright © 1988-2006, Oracle. All rights reserved.

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

The Language Code field prompts from the LANG_CD table, which concerns the person's native or preferred language, and not from the LANGUAGE_CD table, which contains the languages into which the application can be translated.

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

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

National ID

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

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

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

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

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

(GBR) When you enter a national insurance number, the system uses the NID Prefix GBR page to check that you have entered a valid national insurance prefix. You can't save this page if you have entered an invalid national insurance prefix.

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

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

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

(CAN) Verifying Social Insurance Numbers for Canadian Employees

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

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

Copyright © 1988-2006, Oracle. All rights reserved.

(NLD) Verifying Social Security IDs for Dutch Employees

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

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

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

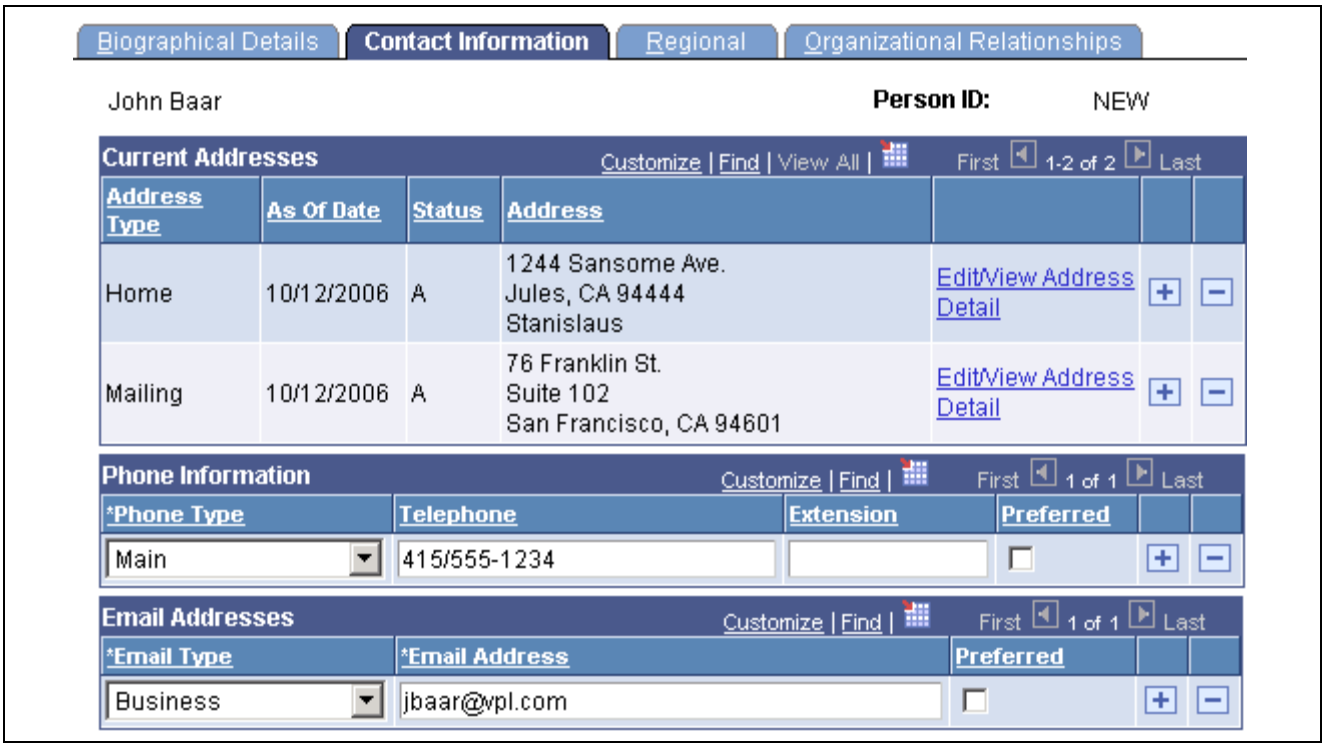
See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Monitor Health and Safety, "Processing Rehabilitation, Claims, and Examination Data," Tracking Employee Medical Exam Results

Chapter 8, "Entering Additional Data in Human Resources Records," page 281

Entering Contact Information

Access the Contact Information page.



Contact Information page

Current Address

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

Copyright © 1988-2006, Oracle. All rights reserved.

Note. Payroll for North America requires the person to have one address with type *Home* to successfully calculate taxes. You must set up each Puerto Rico employee's home address with country code *USA* and state code *PR* for proper tax reporting.

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

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

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

Phone Information

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

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

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

Email Addresses

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

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

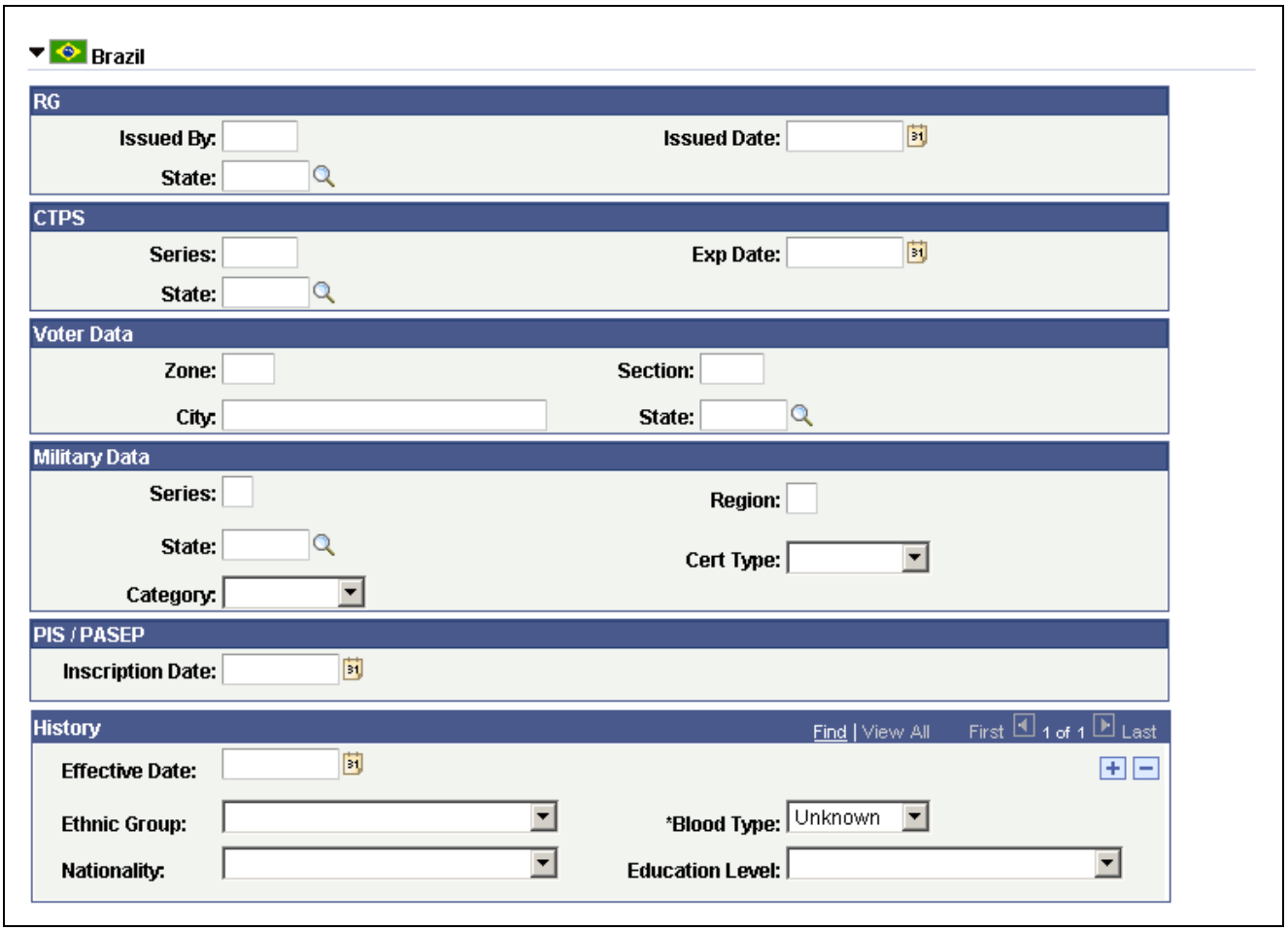
Entering Country-Specific Person Data

Access the Regional page.

 Copyright © 1988-2006, Oracle. All rights reserved.

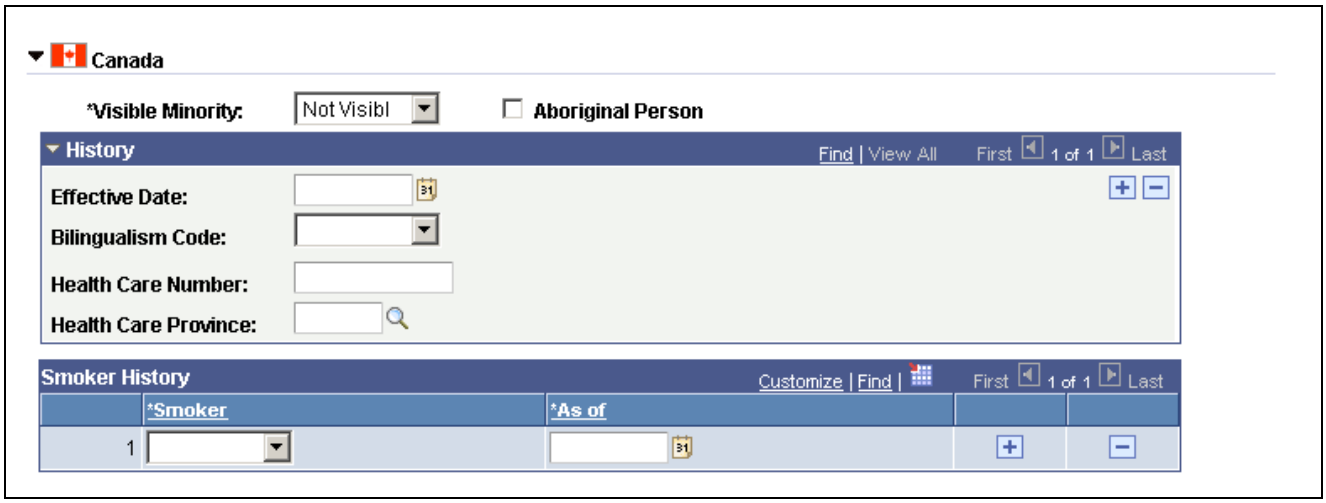


Regional page (1 of 10)

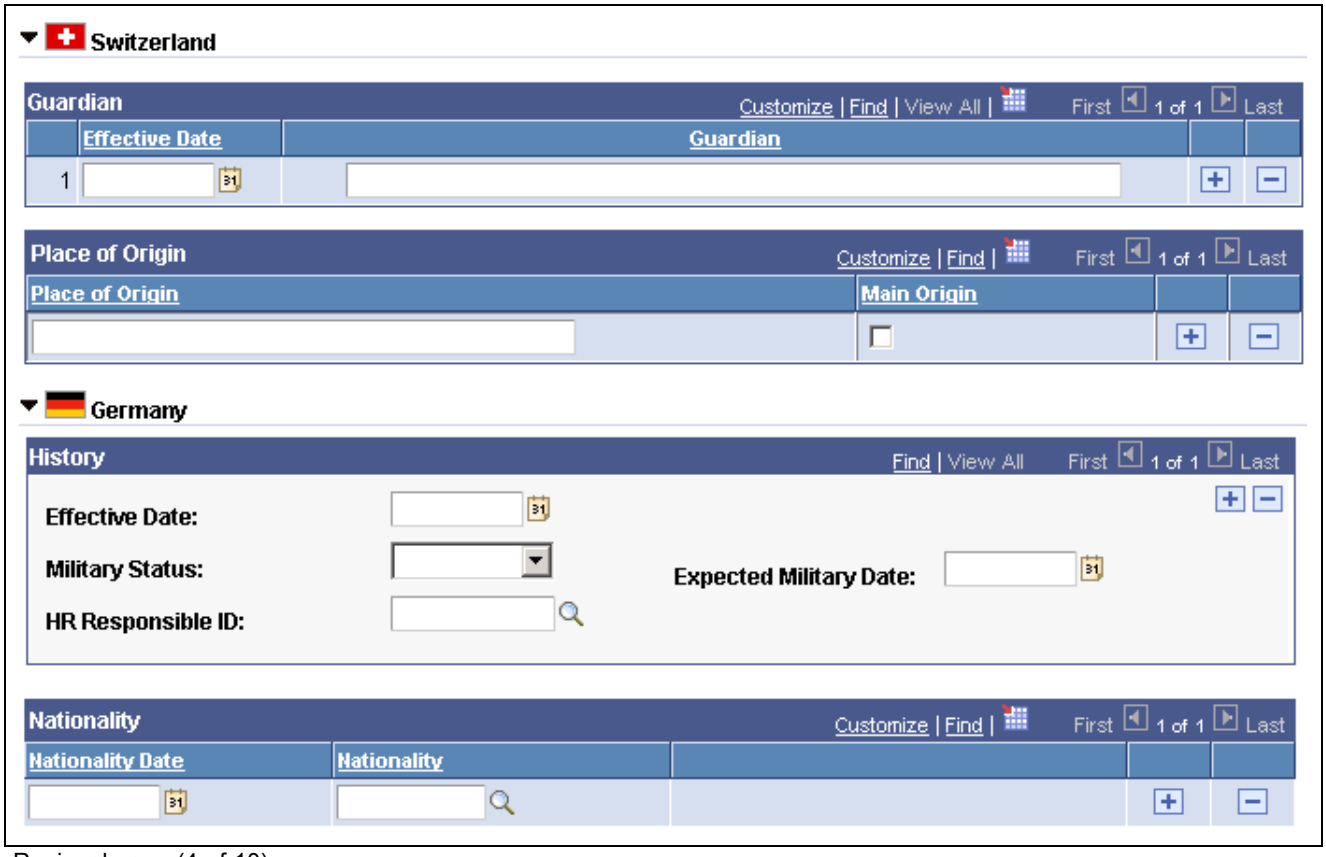


Regional page (2 of 10)

Copyright © 1988-2006, Oracle. All rights reserved.

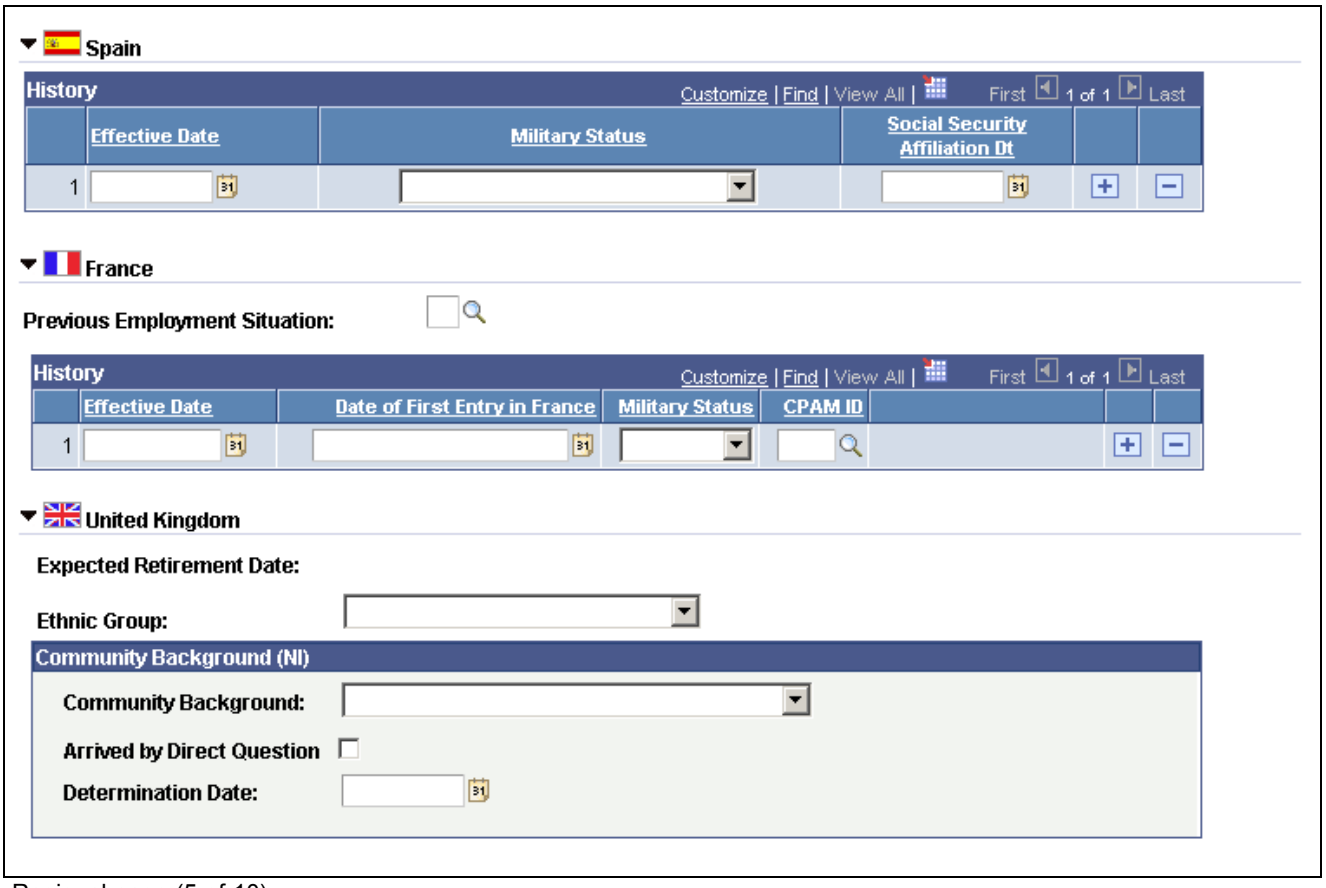


Regional page (3 of 10)



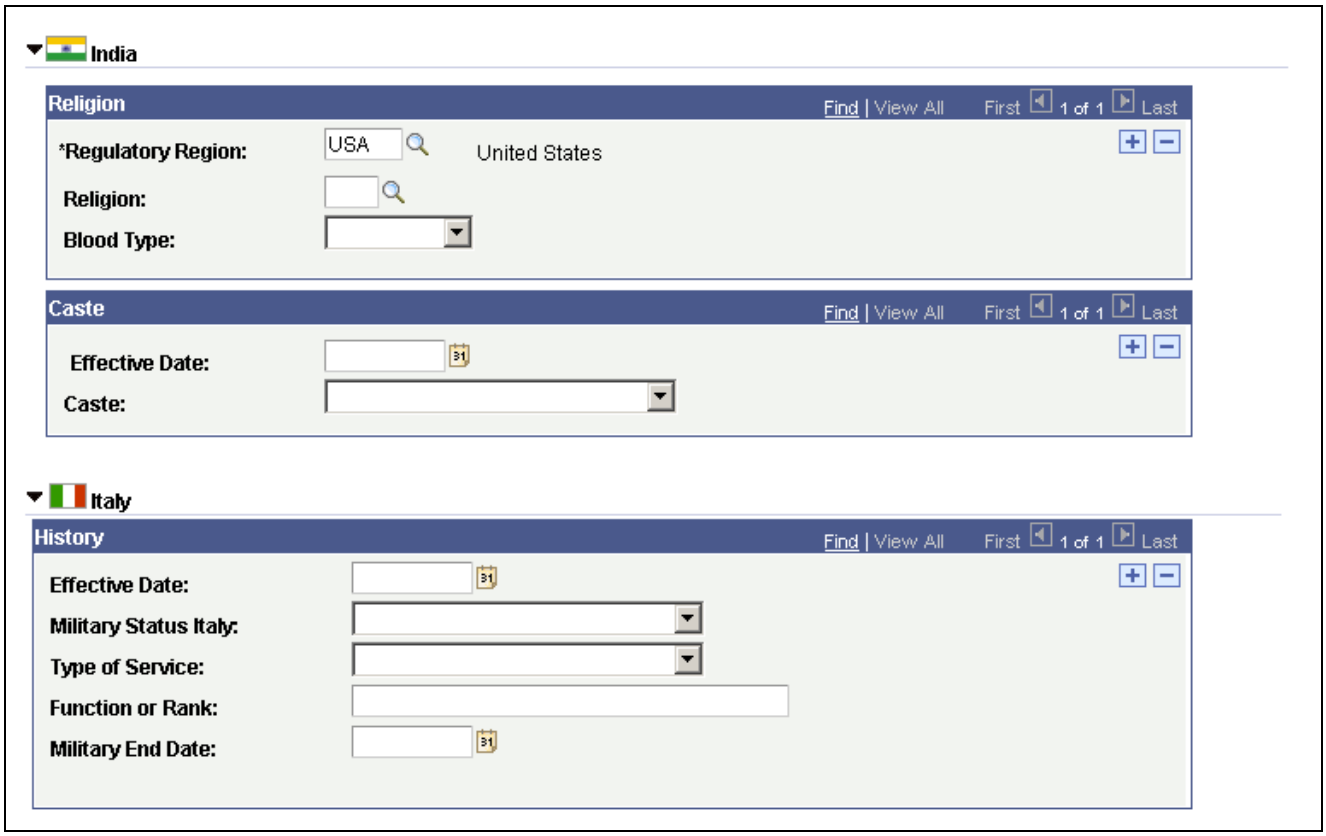
Regional page (4 of 10)

Copyright © 1988-2006, Oracle. All rights reserved.

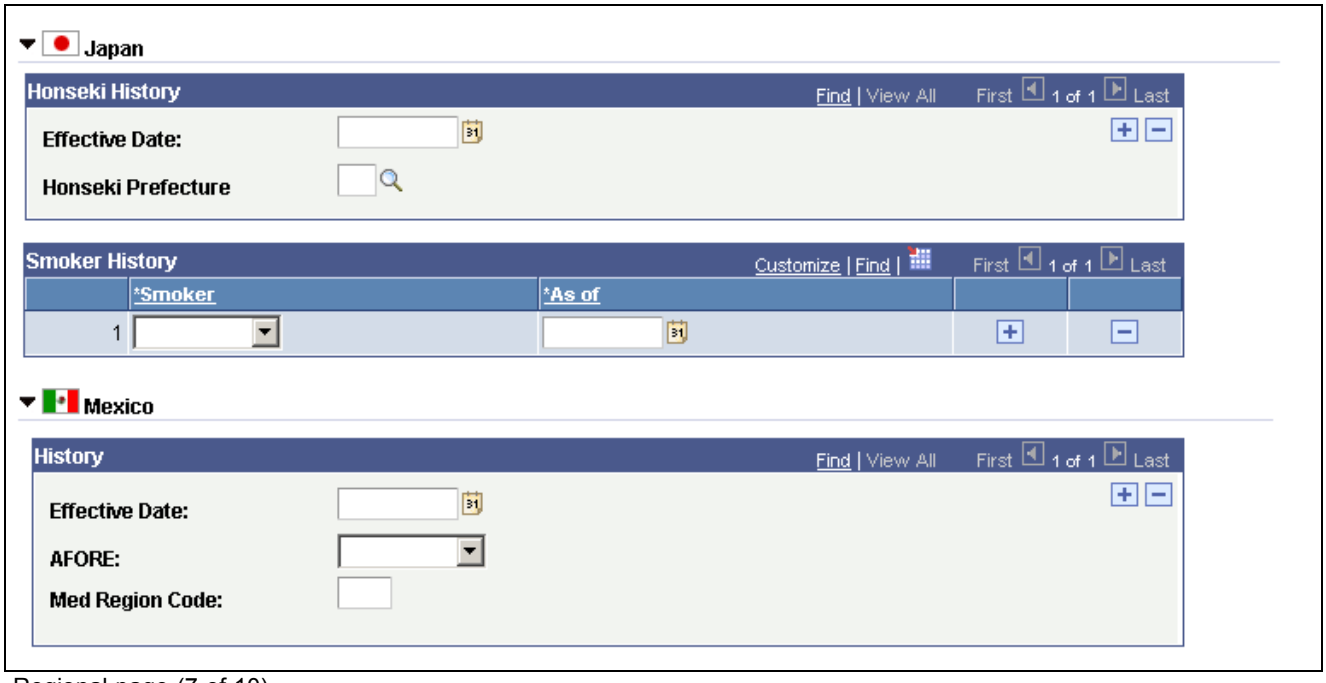


Regional page (5 of 10)

Copyright © 1988-2006, Oracle. All rights reserved.

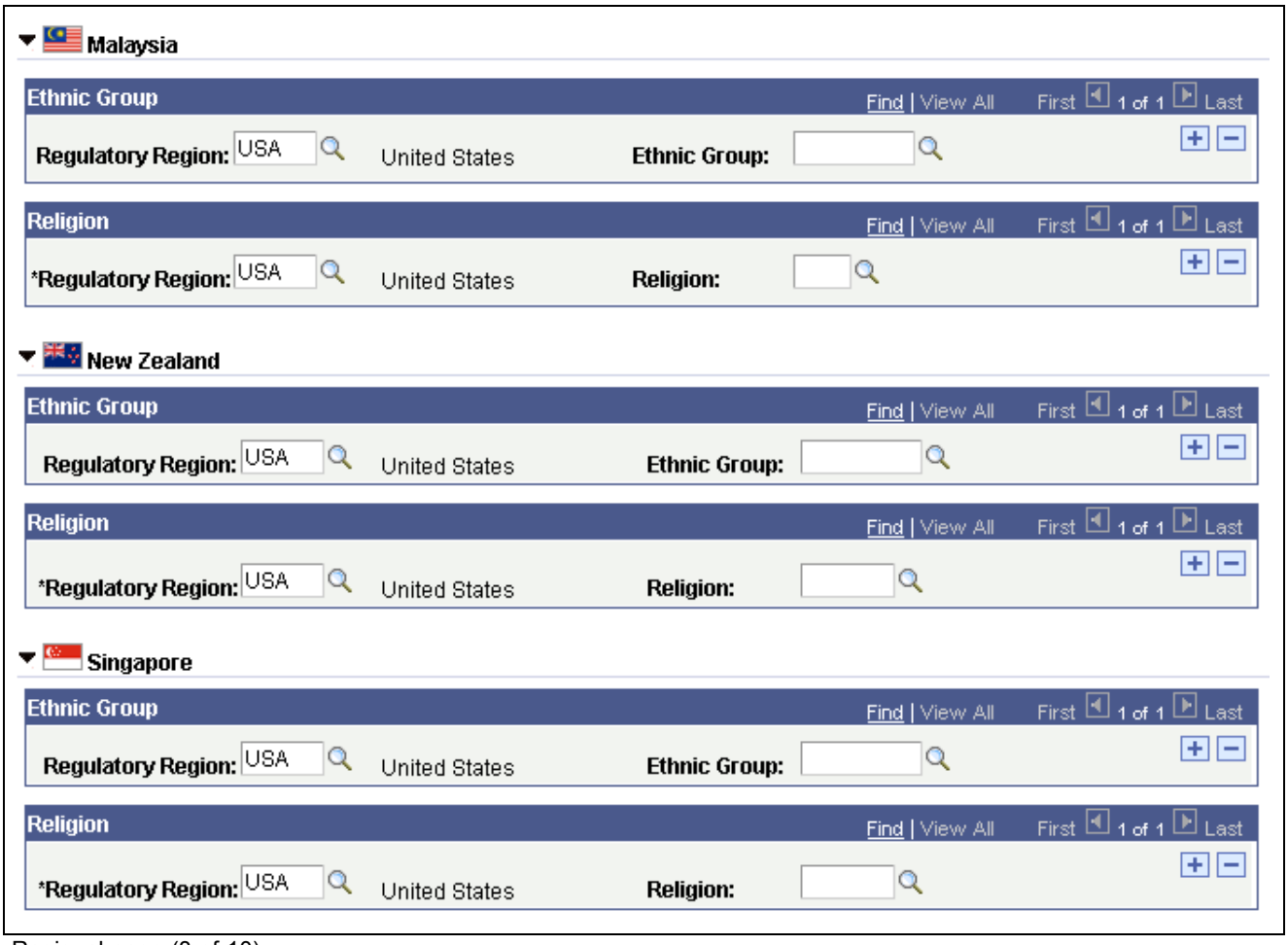


Regional page (6 of 10)

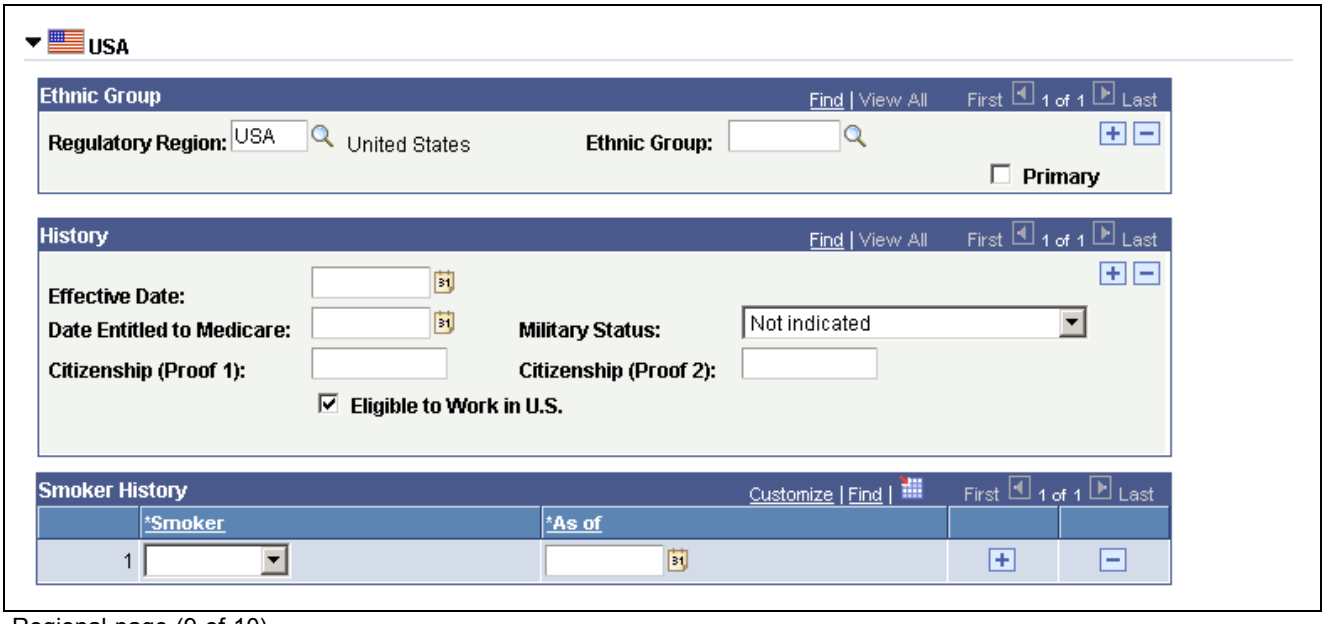


Regional page (7 of 10)

Copyright © 1988-2006, Oracle. All rights reserved.

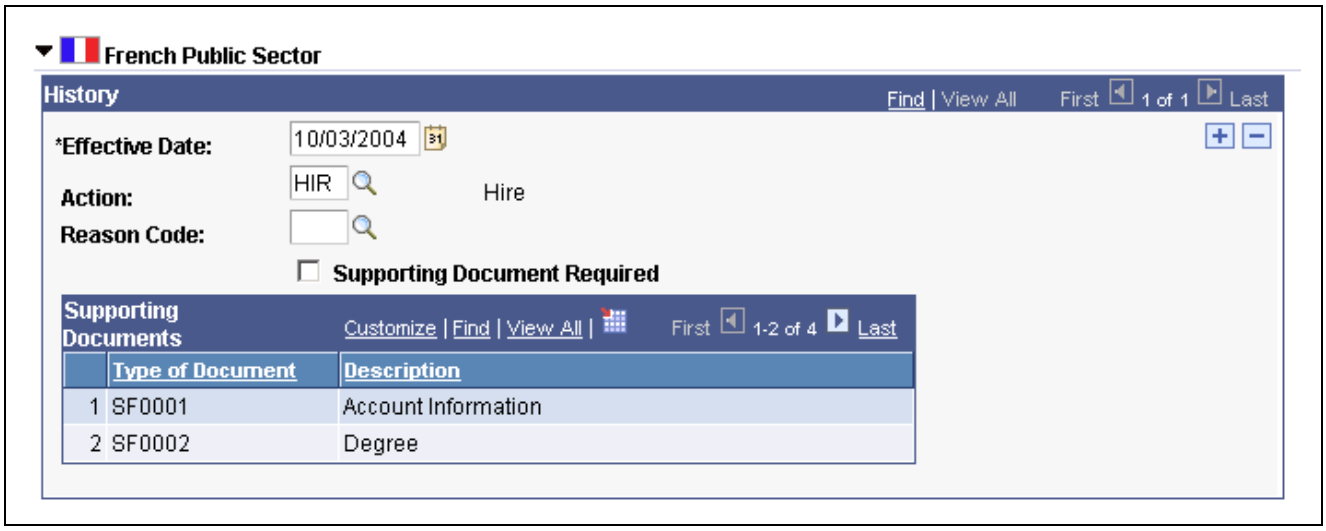


Regional page (8 of 10)



Regional page (9 of 10)

Copyright © 1988-2006, Oracle. All rights reserved.



Regional page (10 of 10)

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

(BRA) Brazil

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

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

Series — Enter the work card number.

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

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

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

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

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

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

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

(CAN) Canada

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

Copyright © 1988-2006, Oracle. All rights reserved.

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

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

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

(CHE) Switzerland

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

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

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

(DEU) Germany

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

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

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

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

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

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

(ESP) Spain

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

(FRA) France

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

Copyright © 1988-2006, Oracle. All rights reserved.

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

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

(GBR) United Kingdom

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

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

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

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

(GBR) Community Background

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

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

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

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

The data that you enter about a Northern Ireland worker's community background is required under the Fair Employment Act. Employers must include this information in the Northern Ireland report (UKNI001) that they submit to the administrative body that monitors employment in Northern Ireland. This report provides an annual summary of the state of the workforce

 Copyright © 1988-2006, Oracle. All rights reserved.

for a particular employer and breaks down employees and applicants for employment into their respective community background categories.

(IND) India

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

Caste Select the person's caste.

(ITA) Italy

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

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

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

(JPN) Japan

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

(MEX) Mexico

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

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

(MYS) Malaysia and (SGP) Singapore

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

(USA) United States

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

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

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

(FPS) French Public Sector

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

Copyright © 1988-2006, Oracle. All rights reserved.

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

See Also

Chapter 3, "Setting Up Country-Specific Tables," Understanding French Social Security Tracking Code Maintenance, page 48

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements, "(CAN) Meeting Regulatory Requirements for Canada"

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Maintaining Payroll Data"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Benefits, "Setting Up Base Benefits Core Tables"

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up Local Country Functionality," (JPN) Setting Up Japanese Control Tables

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Understanding HRMS," Effective Dates

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Working with Languages"

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Working with System Data Regulation in HRMS," Understanding PeopleSoft HRMS System Data Regulation

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS Application Fundamentals Preface," Common Elements Used in PeopleSoft HRMS

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements, "(AUS) Meeting Regulatory Requirements for Australia"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements, "(FRA) Meeting Regulatory Requirements for France"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage French Public Sector, "Updating Employee Records," Tracking Supporting Documents

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements, "(GBR) Meeting Regulatory Requirements for the United Kingdom"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements, "(USA) Meeting Regulatory Requirements for the United States"

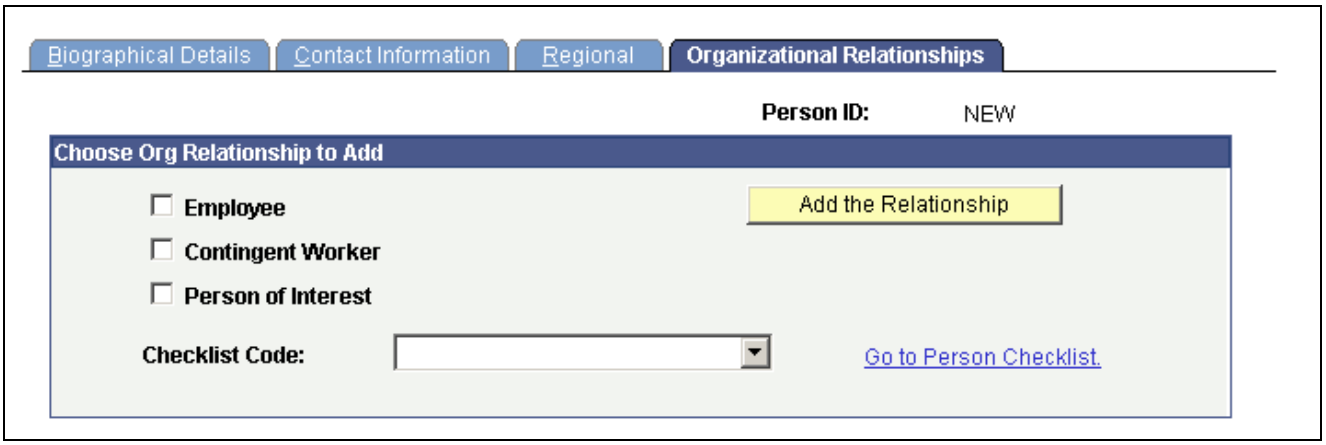
Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Enterprise PeopleTools PeopleBook: Global Technology

Creating Organizational Relationships and Maintaining Checklists

Access the Organizational Relationships page.

 Copyright © 1988-2006, Oracle. All rights reserved.



Organizational Relationships page

Choose Org Relationship to Add

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

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

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

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

When you select Employee, Contingent Worker, or a POI type with a job, the Empl Rcd Nbr field appears. The system determines the next employee record number available for this person, or you can enter your own number and the system will verify that the number you entered does not already exist for this person.

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

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

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

Copyright © 1988-2006, Oracle. All rights reserved.

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

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

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

(FPS) French Public Sector

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

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

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

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

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage French Public Sector*, “Hiring French Public Sector Employees”.

See Also

Chapter 5, “Adding a Person in PeopleSoft Human Resources,” Controlling Data Access for POIs Without Jobs, page 128

Chapter 6, “Increasing the Workforce,” Adding Organizational Instances for Employees, Contingent Workers, and POIs, page 146

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, “(E&G) Administering Contract Pay”

Controlling Data Access for POIs Without Jobs

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

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Setting Up and Administering HRMS Security”

 Copyright © 1988-2006, Oracle. All rights reserved.

Understanding Security for POIs Without Jobs

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

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

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

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

Security Type	Security Key
Location	CCBC1
Business Unit	CFBBU
Institution	PSSTA

The following users have access to this person:

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

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

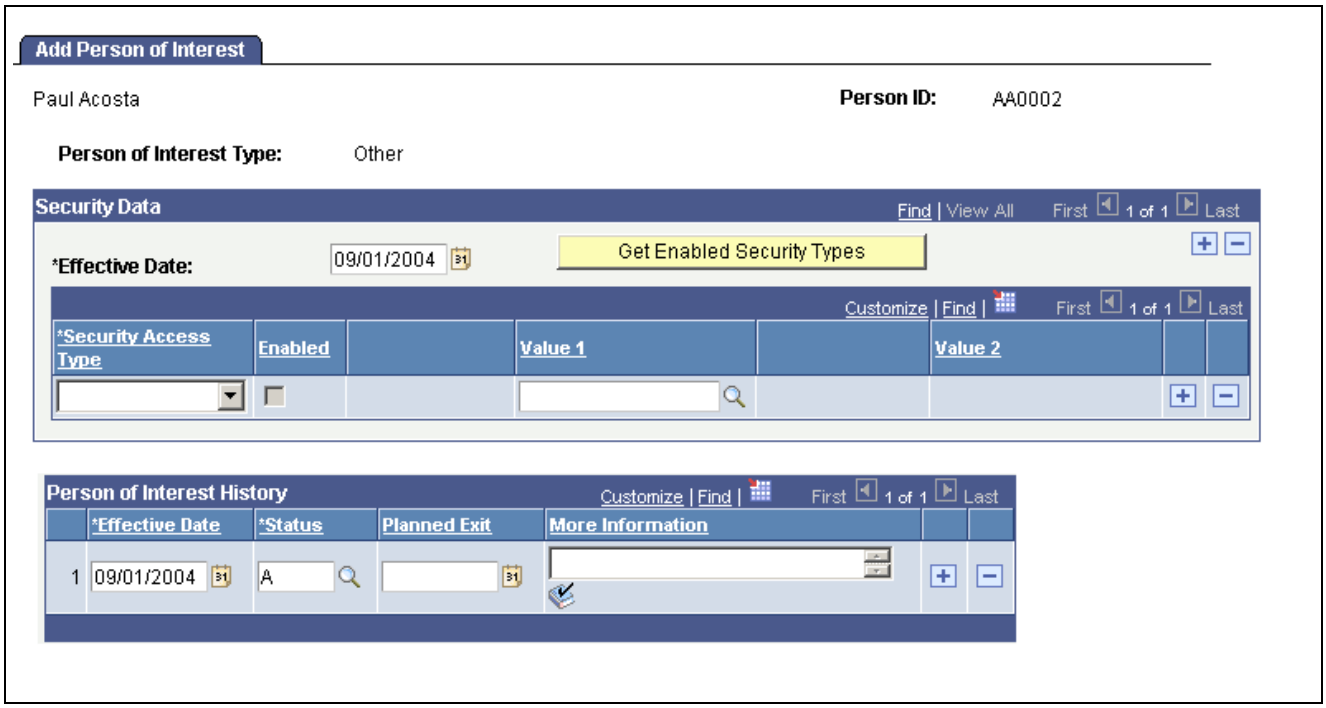
Pages Used to Control Access to the Data of POIs Without Jobs

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

Adding and Maintaining POI Types

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

Copyright © 1988-2006, Oracle. All rights reserved.



Add Person of Interest page

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

Security Data

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

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

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

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

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

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

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

Copyright © 1988-2006, Oracle. All rights reserved.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Administering HRMS Security".

Person of Interest History

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

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

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Training*, "Defining Training Courses and Programs," Setting Up Instructors.

See *PeopleSoft Enterprise Learning Management PeopleBook.*

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

Copyright © 1988-2006, Oracle. All rights reserved.

 Copyright © 1988-2006, Oracle. All rights reserved.

CHAPTER 6

Increasing the Workforce

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

- Add organizational instances for employees, contingent workers, and persons of interest (POIs).
- Increase the workforce through templates and job applicants.
- Add additional assignments.
- Review organizational relationships.
- (BRA) Run Brazil employment reports.
- (CAN) Run the Canadian Hire List report.
- (NLD) Run the First Day Notification.

Understanding Job Data

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

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

See Chapter 5, "Adding a Person in PeopleSoft Human Resources," page 109.

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

Copyright © 1988-2006, Oracle. All rights reserved.

Component	Menu	Use To
Template-Based Hire (HR_TBH_JOB)	• Workforce Administration, Template-Based Hire • Manager Self-Service, Job and Personal Information, Add Template-Based Hire	Add a new hire by picking a pre-configured template and completing a simple data entry page. Once the data is entered it can be saved directly to the database, submitted for processing or saved for later.
• Hire (HR_MANAGE_HIRES) • (FPS) Hire • (USF) Hire USF (ER_GVT_HIRE_LAUNCH)	Workforce Administration, Personal Information, Organizational Relationships, Manage Hires	Add a job applicant with information in the system, added through the Recruit Workforce business process. When you use these components to hire an applicant, the information that you've already entered in the system becomes part of the worker's record, including the referral source information. All other fields on these pages are documented in this chapter. **Note.** (USF) Federal users can find information on hiring job applicants in the Recruit Workforce business process. (FPS) French Public Sector users can find information on hiring job applicants in the Recruit Workforce business process.
Add Contingent Worker Instance (JOB_DATA_CWR)	• Workforce Administration, Job Information • Workforce Administration, Personal Information, Organizational Relationships	Add a contingent worker organizational instance.
Add POI Instance (JOB_DATA_POI)	• Workforce Administration, Job Information • Workforce Administration, Personal Information, Organizational Relationships	Add a POI organizational instance for a person who does not comprise the workforce but for whom you require a job record.
Add Additional Assignment (ADD_PER_ORG_ASGN) (FPS) Add Concurrent Empl Record FPS (HIRE_DATA_BIS) (USF) Concurrent Hire USF (EE_CONC_HIRE)	Workforce Administration, Job Information **Note.** Access the Concurrent Job component from the Add Additional Assignment component (ADD_PER_ORG_ASGN).	Add an additional employment instance for an employee or contingent worker.
Job Data (JOB_DATA).	Workforce Administration, Job Information	Update (including adding temporary assignments) the job record of an employee, contingent worker, or POI.

Copyright © 1988-2006, Oracle. All rights reserved.

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

Note. Template-Based hires does not use the actual job data pages in the template, however, it does use all the fields broken up into logical sections.

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

See Chapter 7, "(USF) Adding an Employment Instance," page 237.

See Chapter 10, "Managing Country-Specific Workforce Data," page 383.

See Chapter 15, "Updating Person and Job Information," page 531.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage French Public Sector*, "Hiring French Public Sector Employees".

Understanding the Job Data Pages

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

- General employment information.

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

- Specific job data.

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

- Earnings data.

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

- Benefits program.

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

Understanding Employment Information Data

Unlike the data on the Job Data pages, the information on the Employment Information page isn't effective-dated, so the data that you enter and review on this page tells you about the worker's current information for this employment record number.

This means that if you rehire a worker and enter a future effective date, the system clears the Termination Date and Date Last Worked fields. To review information that is in other data rows, use the Job Data component.

Copyright © 1988-2006, Oracle. All rights reserved.

This page tracks data at two different levels: organizational and assignment. The organizational instance is the occurrence of an employment, contingent worker, or POI relationship with an organization, initiated when you create the person's first job data record. The system uses an organizational instance record number to distinguish between organizational instances. The organizational instance number is the same as the ERN of the original (controlling) job data record under that instance.

The assignment level is the actual job data record, or records, associated with the instance. Since people can have more than one job data record under an instance (for example, an additional job or a temporary assignment), tracking the dates of the assignments separately from the dates of the instance enables you to distinguish between when a person was hired (tracked at the instance level) and terminated and when they started and completed an assignment or job.

The system uses the dates of the original job data record under an instance (when there are more than one job data records under an instance, this job data record is the *controlling instance*) to determine the dates of the instance. All other assignments under the instance inherit the instance dates from the original assignment.

The system also uses the actions you use on a job data record to determine which dates to update. For example, when you use the action of *HIR* (hire), the system assumes that the new job data record represents a new instance for a new hire, with its own hire dates. However, if you use the action of *ADL* (additional job), the system assumes that the new job data record is in addition to an existing instance and will use the hire dates from the controlling instance.

This example illustrates how the system establishes and tracks the organizational record numbers, ERNs, instance dates, and assignment dates for someone with multiple organizational relationships and job data records:

Note. This example is intended to illustrate the record number fields and the system date fields, not every field on this page.

Bobby Singh joined company XYZ on February 2, 1995. At the end of 1999, company ABC bought company XYZ and completed the takeover on January 1, 2000. When the HR administrator at company ABC first enters Bobby in the system, he creates a job data record with the action of *HIR* and an effective date of January 1, 2000, reflecting Bobby's hire date with the new company.

The fields on the Employment Data page have the following values:

 Copyright © 1988-2006, Oracle. All rights reserved.

Bobby Singh	EmplID: XYZ001	ERN: 0
Level	**Field**	**Date**
Organizational Instance	Organizational Instance Record	0
	Original Start Date	02/02/1995 The system entered the effective date of the job data record as a default value, but the HR administrator overrides it to enter Bobby's start date at company XYZ.
	Last Start Date	01/01/2000
	First Start Date **Note.** This is the hire date used in all reports tracking hires.	01/01/2000
	Termination Date	blank
	Org Instance Service Date	01/02/2000 The system entered the effective date of the job data record as a default value, but the HR administrator overrides it to the date from which the company calculates service for acquired employees.
Organizational Assignment	Last Assignment Start Date	01/01/2000
	First Assignment Start Date	01/01/2000
	Assignment End Date	blank

From June 3, 2000 to September 10, 2000, Bobby has an additional assignment with the company. The HR administrator uses the action of *ADL* when creating the additional assignment so the system does not treat the new job data record as a separate instance with it's own hire date. The fields on the Employment Data page for the new assignment's job data record have the following values:

Copyright © 1988-2006, Oracle. All rights reserved.

Bobby Singh	EmplID: XYZ001	ERN: 1
Level	**Field**	**Date**
Organizational Instance	Organizational Instance Record	0
	Original Start Date	02/02/1995
	Last Start Date	01/01/2000
	First Start Date	01/01/2000
	Termination Date	blank
	Org Instance Service Date	01/02/2000
Organizational Assignment	Last Assignment Start Date	06/03/2000
	First Assignment Start Date	06/03/2000
	Assignment End Date	09/10/2000

The organizational instance dates come from the original, controlling instance and cannot be changed on the Employment Data page for the non-controlling instance.

On September 15, 2000, Bobby takes on a new job with company ABC. The HR administrator creates a new employment instance and uses the action of *HIR* when creating the instance. The fields on the Employment Data page for the new job have the following values:

Bobby Singh	EmplID: XYZ001	ERN: 2
Level	**Field**	**Date**
Organizational Instance	Organizational Instance Record	2 **Note.** Notice that the organizational instance record number does not follow in sequence with Bobby's other instance, but that it matches the ERN of the job data record created under the new instance.
	Original Start Date	09/15/2000
	Last Start Date	09/15/2000
	First Start Date	09/15/2000
	Termination Date	blank
	Org Instance Service Date	09/15/2000

Copyright © 1988-2006, Oracle. All rights reserved.

Bobby Singh	EmplID: XYZ001	ERN: 2
Level	**Field**	**Date**
Organizational Assignment	Last Assignment Start Date	09/15/2000
	First Assignment Start Date	09/15/2000
	Assignment End Date	blank

This organizational instance is completely separate from the first organizational instance and Bobby is treated as a new hire, as reflected in his original start date and service date. A company with different business rules may choose to acknowledge his past service for this instance, but company ABC does not and, because the two instances are separate, it doesn't have to.

Bobby is offered an additional assignment with the second job starting on January 14, 2001 and so he tenders his resignation for his original job, effective January 15, 2001. The fields on the Employment Data page for the first organizational instance have the following values:

Bobby Singh	EmplID: XYZ001	ERN: 0
Level	**Field**	**Date**
Organizational Instance	Organizational Instance Record	0
	Original Start Date	02/02/1995
	Last Start Date	01/01/2000
	First Start Date	01/01/2000
	Termination Date	01/15/2001
	Org Instance Service Date	01/02/2000
Organizational Assignment	Last Assignment Start Date	01/01/2000
	First Assignment Start Date	01/01/2000
	Assignment End Date	01/15/2001

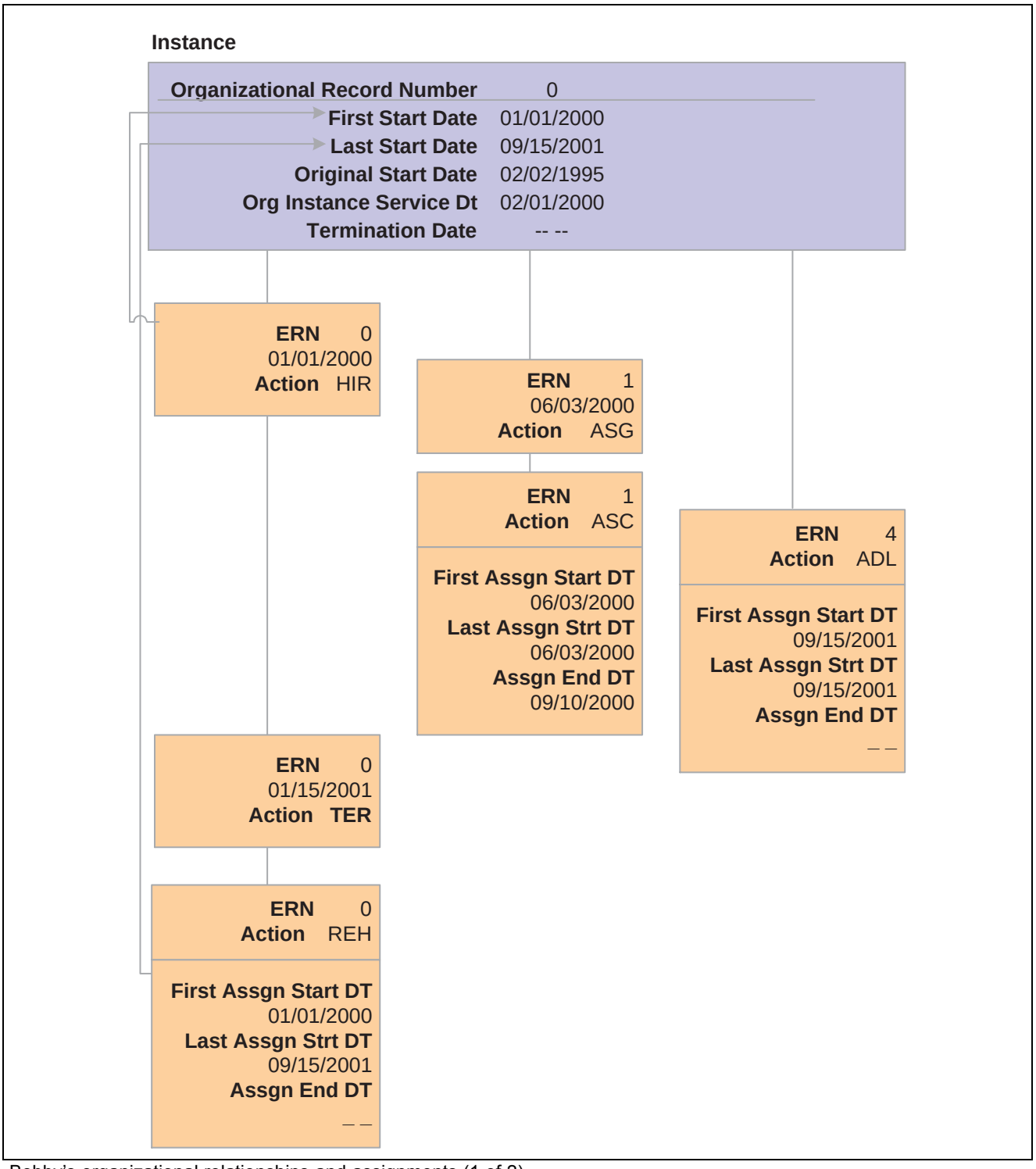
The fields on the Employment Data page for the new assignment under the second organizational instance have the following values:

Copyright © 1988-2006, Oracle. All rights reserved.

Bobby Singh	EmplID: XYZ001	ERN: 3
Level	**Field**	**Date**
Organizational Instance	Organizational Instance Record	2
	Original Start Date	09/15/2000
	Last Start Date	09/15/2000
	First Start Date	09/15/2000
	Termination Date	blank
	Org Instance Service Date	09/15/2000
Organizational Assignment	Last Assignment Start Date	01/14/2001
	First Assignment Start Date	01/14/2001
	Assignment End Date	blank

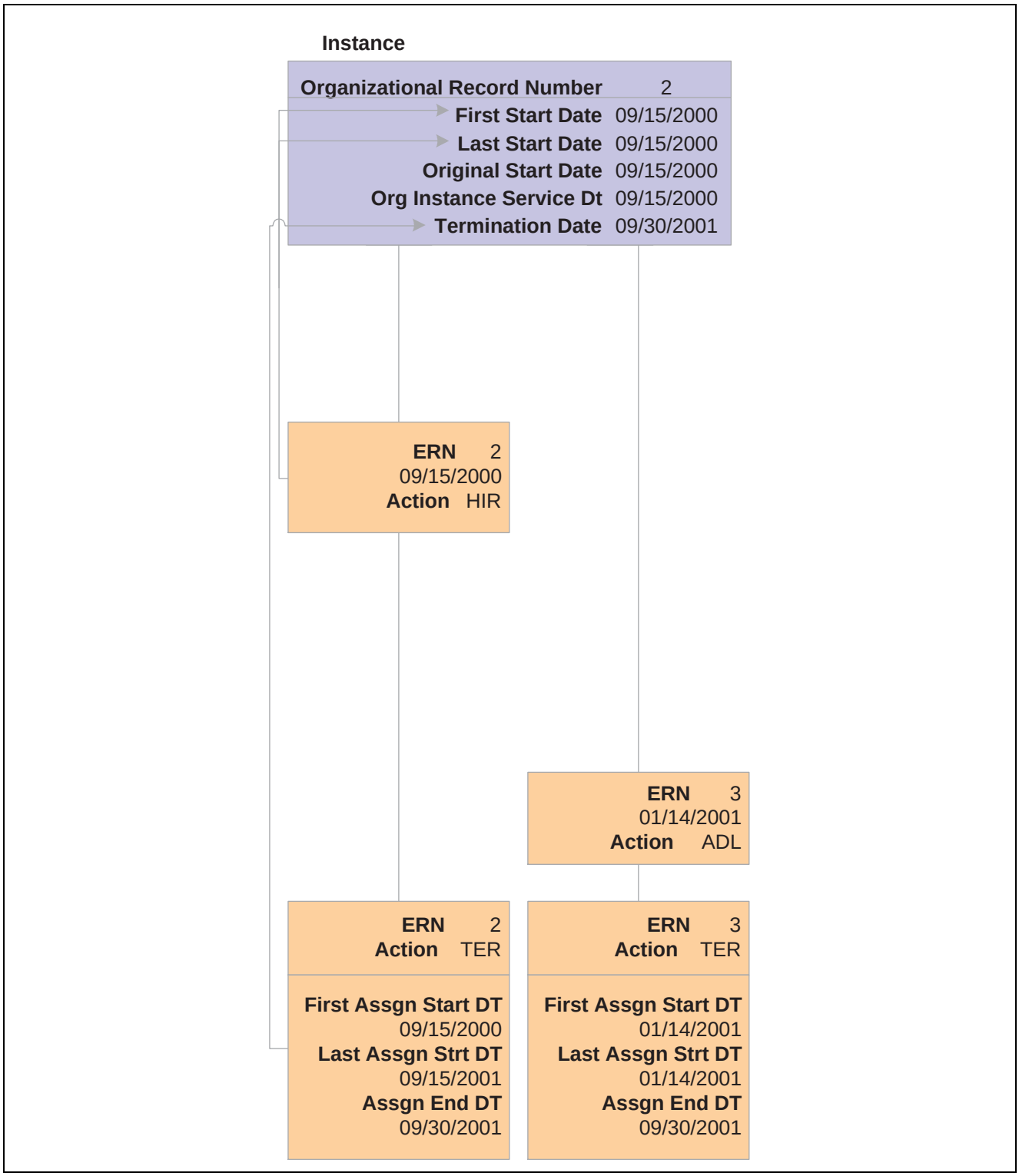
Finally, the division in which Bobby has worked the two jobs in his second organizational instance closes, terminating both the controlling instance and, by association, the assignment effective September 30, 2001 and Bobby is rehired into his original job with a new, additional job on the side, effective September 15, 2001. The following graphics illustrates Bobby's organizational instances and assignments:

Copyright © 1988-2006, Oracle. All rights reserved.



Bobby's organizational relationships and assignments (1 of 2)

Copyright © 1988-2006, Oracle. All rights reserved.



Bobby's organizational relationships and assignments (2 of 2)

Notice that all of the instance dates come from the controlling assignment and that the termination date is refreshed when Bobby is rehired.

Copyright © 1988-2006, Oracle. All rights reserved.

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

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

Page	Add Employment Instance Fields	Add Contingent Worker Instance Fields	Add POI Instance Fields
Work Location	The default value for the Action field is *Hire*	The default value for the Action field is Add Contingent Worker	The default value for the Action field is *Add Person of Interest*
Work Location	Payroll Status	Job Status	Job Status
Payroll	Employee Type	Pay Type	Pay Type
Employment Information		Provider ID	Provider ID

Security Considerations for Users Managing Employees and Contingent Workers

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

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

Managing Job Data When You Use the Manage Positions Business Process

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

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

Adding Versus Updating Job Records

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

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

Copyright © 1988-2006, Oracle. All rights reserved.

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

See Chapter 15, "Updating Person and Job Information," page 531.

See Chapter 17, "(USF) Administering Personnel Action Requests," page 601.

(JPN) Assigning Internal Identification Numbers

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

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

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

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

Example 1

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

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

Example 2

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

 Copyright © 1988-2006, Oracle. All rights reserved.

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

Prerequisites

Before you add a new organizational instance:

- Set up the Administer Workforce control tables.

  See Chapter 2, “Setting Up the Administer Workforce Business Process,” page 5.

- Set up the Administer Workforce country-specific control tables.

  See Chapter 3, “Setting Up Country-Specific Tables,” page 47.

- Create personal data records for employees, contingent workers, and POIs.

  See Chapter 5, “Adding a Person in PeopleSoft Human Resources,” page 109.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Working with Regulatory Regions”

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Setting Up and Administering HRMS Security”

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Setting Up and Installing PeopleSoft HRMS”

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Setting Up and Working with Languages”

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Setting Up Organization Foundation Tables”

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Setting Up Personal Information Foundation Tables”

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Setting Up Jobs”

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “(USF) Setting Up Human Resources Management Tables”

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Setting Up Banks and Bank Branches”

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Setting Up Local Country Functionality”

Copyright © 1988-2006, Oracle. All rights reserved.

Adding Organizational Instances for Employees, Contingent Workers, and POIs

This section lists common elements and discusses how to:

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

See Chapter 6, "Increasing the Workforce," Adding Additional Assignments, page 200.

Common Elements Used in this Section

Goto Row	Click icon to enter a date or row number in which you would like to view.
Benefits Program Participation	Click to Access the Benefit Program Participation page.
Cross Border Worker	Select if the person lives in one country and works in another. These people have special tax and social security needs.
Employment Data	Click to access the Employee Information page.
Earnings Distribution	Click to access the Job Earnings Distribution page.
FA Holiday Type (festive advance holiday type)	Select the festive advance holiday type.
Festive Advance Eligible From	Select the date on which the person becomes eligible for the selected festive advance pay program.
Festive Advance Pay Program	Select the festive advance pay program for the person.
Job Data	Click to access the Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Compensation pages.
Military Status	Select the person's current military status.
Owns 5% (Or More) of Company	Select if the person owns five percent or more of the company. The system uses this field to identify highly compensated employees for the

 Copyright © 1988-2006, Oracle. All rights reserved.

Non-Discrimination Testing – 401(k)/401(m) report (NDT004) in the Manage Base Benefits business process of PeopleSoft Enterprise Human Resources.

Regulatory Region Select the regulatory region.

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

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

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

See Also

Chapter 7, "(USF) Adding an Employment Instance," page 237

Chapter 8, "Entering Additional Data in Human Resources Records," page 281

Chapter 15, "Updating Person and Job Information," page 531

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

Note. One of the pages used to add employees, contingent workers and POIs is the Template-Based Hire. It is discussed in detail in another section in this chapter.

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

Copyright © 1988-2006, Oracle. All rights reserved.

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

Copyright © 1988-2006, Oracle. All rights reserved.

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

Copyright © 1988-2006, Oracle. All rights reserved.

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

Copyright © 1988-2006, Oracle. All rights reserved.

Page Name	Object Name	Navigation	Usage
Job Earnings Distribution	JOB_DATA_ERNDIST	Click the Earnings Distribution link at the bottom of the component. • Workforce Administration, Job Information, Add Employment Instance • Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance • Workforce Administration, Job Information, Add Contingent Worker Instance • Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance	Distribute a person's compensation for one job among different departments, job codes, accounts, shifts, position numbers, or general ledger pay types. If the person's pay is regularly charged to more than one cost center, designate how much to allocate to each cost center.
Benefit Program Participation	JOB_DATA_BENPRG	Click the Benefits Program Participation link at the bottom of the component. • Workforce Administration, Job Information, Add Employment Instance • Workforce Administration, Personal Information, Organizational Relationships, New Employment Instance • Workforce Administration, Job Information, Add Contingent Worker Instance • Workforce Administration, Personal Information, Organizational Relationships, New Contingent Worker Instance	Specify the benefit program in which a person is enrolled for benefits in PeopleSoft Enterprise Human Resources or PeopleSoft Enterprise Benefits Administration.

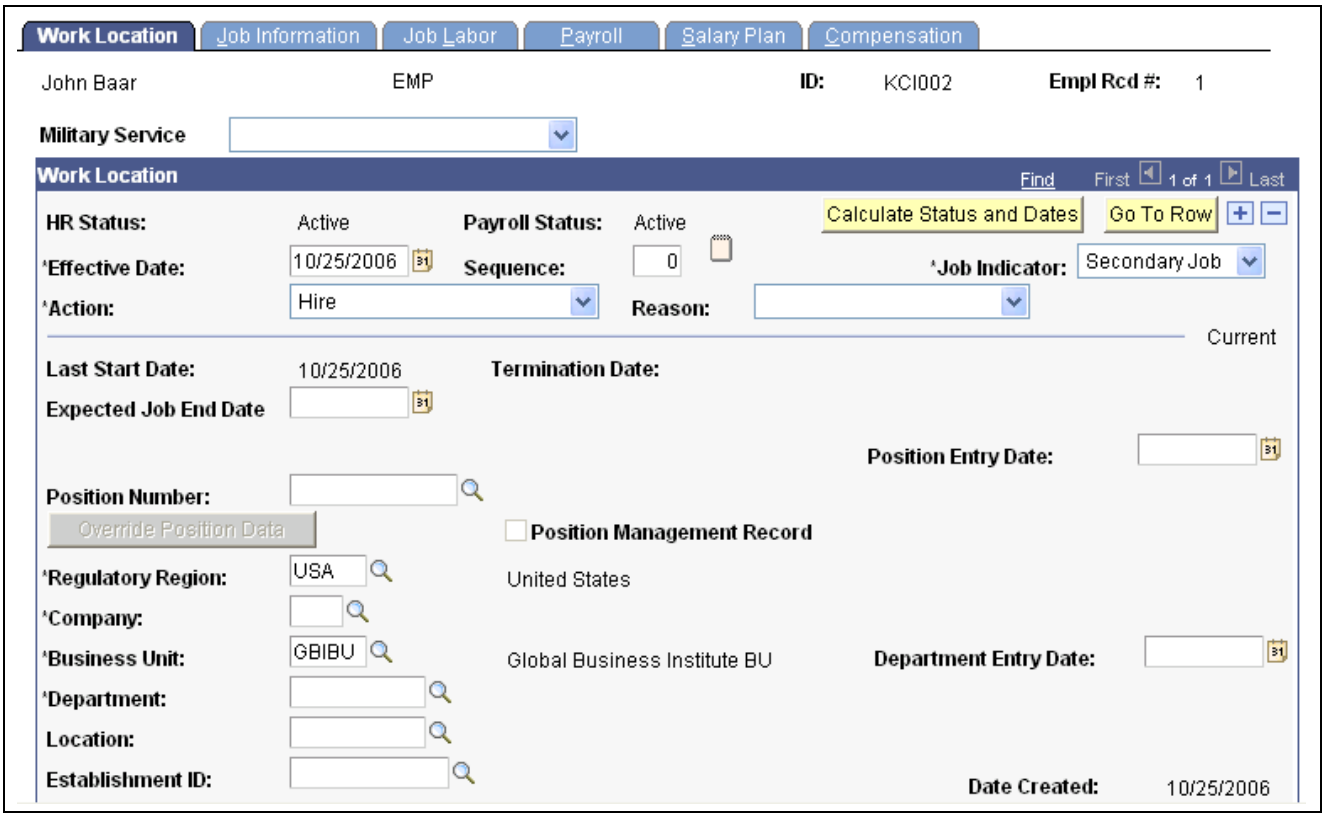
Copyright © 1988-2006, Oracle. All rights reserved.

Page Name	Object Name	Navigation	Usage
Person Checklist	PERSON_CHECKLIST	Workforce Administration, Personal Information, Organizational Relationships, Person Checklist, Person Checklist	To ensure that the human resources administrators perform all the required administrative tasks for a person, create a checklist listing all the items that need to be completed and the person responsible for completing them.
Person Applicant Information	PERS_APPL_INFO	Workforce Administration, Personal Information, Organizational Relationships, Person Applicant Information, Person Applicant Information	Define applicant referral information.
Employee Checklist	EMPLOYEE_CHECKLIST	Workforce Administration, Personal Information, Organizational Relationships, Person Assignment Checklist, Employee Checklist	To ensure that the human resources administrators perform all the required administrative tasks for an employee, create a checklist listing all the items that need to be completed and the person responsible for completing them.

Entering Employee Job Location and Position Information

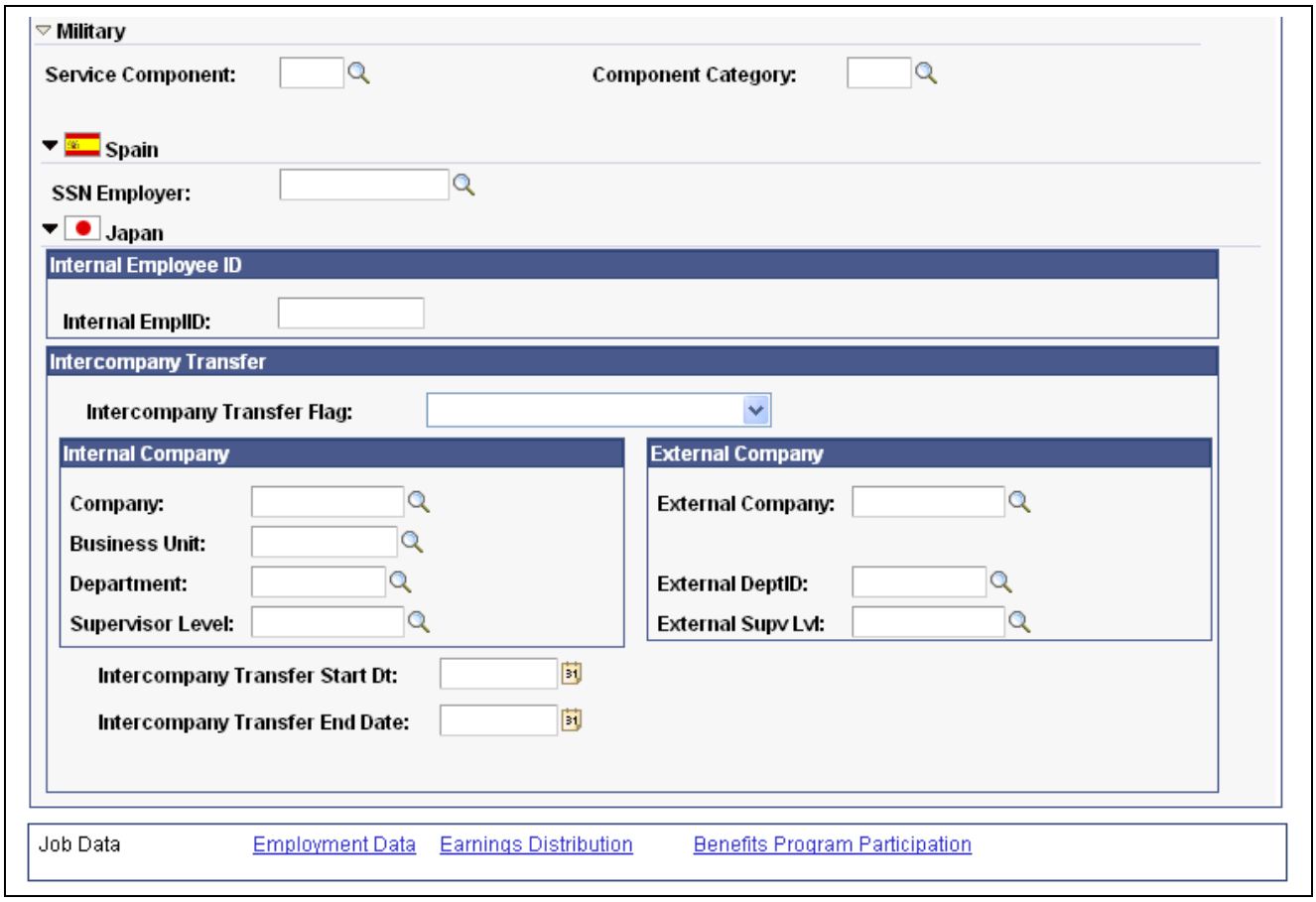
Access the Work Location page.

Copyright © 1988-2006, Oracle. All rights reserved.



Work Location page (1 of 2)

Copyright © 1988-2006, Oracle. All rights reserved.



Work Location page (2 of 2)

Military Service This field displays when the Military check box is selected on the Installation Table. This field is available if you are adding a new Job Data record, when you are not adding a new Job Data record this field is display only.

Select the military service in which the person is serving.

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

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

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

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

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

Copyright © 1988-2006, Oracle. All rights reserved.



Click the Calculate Status and Dates button to calculate the person's HR, job, or payroll status and the employment dates so that you can review the changes before you save the component. The system displays this button when you make a change to the effective date or one of the status fields.

You do not need to click this button to refresh the status and date fields. The system will refresh these fields when you save the component.

Effective Date Enter the effective date. When you add a new instance with the action of *Hire*, the effective date that you enter here becomes the hire and original hire date.

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

Maintain/View Notes Click icon to access the Job Data Notepad page.

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

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

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

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

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

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

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

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

Position Number If you drive part or all of the system by position, select a position number. Define positions in the Add/Update Position Info component. When you leave the Position Number field, the system completes position-related fields in the Job Data component with default data from the Add/Update Position Info component, including job code, department, location, supervisor level, reports to, and full- or part-time status. The corresponding fields become unavailable for entry.

Copyright © 1988-2006, Oracle. All rights reserved.

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

Position Entry Date When you enter a position number for this person, the system populates this field with the effective date and this field becomes unavailable for entry. You can override the default by clicking the Override Position Data button.

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

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

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

Regulatory Region If you have specified a regulatory region for the position you associated with this person, the system enters a default regulatory region and this field becomes unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position, then the system populates the field by default with the regulatory region for the person, based on your user preferences entered in the Org Defaults by Permission Lst component . You can override the default.

Company If you have specified a company for the position you associated with this person, the system enters a default company and this field becomes unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position and you assigned a company to a department in the Department table, a default company code appears, and this field becomes unavailable for entry. If you did not designate a company on the Department table, select a company here.

Business Unit If you have specified a business unit for the position you associated with this person, the system enters a default business unit and this field becomes unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position, then the system populates the field by default with the business unit for the person, based on your user preferences. You can override the default.

The business unit that you assign to the person on this page and the setID functionality in PeopleSoft Enterprise Human Resources Management affect the way that default values work throughout the PeopleSoft Enterprise

 Copyright © 1988-2006, Oracle. All rights reserved.

Human Resources system. Your entry in this field controls the departments, locations, job codes, salary plans, and so on that you see on the remaining Job Data component pages.

Department

If you have specified a department for the position you associated with this person, the system enters a default department and this field becomes unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position, select the department code for this person. When you leave the field, the system inserts a default supervisor or reports to ID on the Job Information page if you entered a default supervisor or reports to ID for this department in the Department table.

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

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up Organization Foundation Tables," Setting Up Holiday Schedules.

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

Department Entry Date

If you have specified a department for the position you associated with this person, the system enters a default department entry date and this field becomes unavailable for entry, unless you click the Override Position Data button.

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

Location

If you have specified a location for the position you associated with this person, the system enters a default location and this field becomes unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position and you assigned a location to a department in the Department table, the system displays the department location, if the default location setID that you define in the Department table matches the control location setID that is defined for that business unit in the TableSet Control - Record Group table. You can change the location code.

If you did not designate a location on the Department table, select a location here.

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

Establishment ID

Select the person's establishment.

Establishments are used for several countries for local regulatory reporting. These reports require that each person be assigned to a single establishment.

Establishments in regulatory regions other than USA have a one to one relationship with locations.

Copyright © 1988-2006, Oracle. All rights reserved.

Note. (USA) In the USA regulatory region, there is a many to many relationship between locations and establishments. USA regulatory reports require that you associate an establishment ID with a person at the job level.

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

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

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

Military

The Military section is available when military is enabled on the Installation Table. Valid values for the service component and component category of the person depend upon the military service you enter at the top of the Work Location page.

Service Component Indicate the employee's service type for their military service, such as regular, activity reserve, and so forth.

Component Category Enter a service component category to further define for the service component for this person.

(ESP) Spain

SSN Employer (social security number for employer) Enter the company SSN, as assigned by the Spanish government, that applies to this person.

(JPN) Japan

Internal EmplID (internal employee ID) Enter the person's internal ID.

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

See Chapter 5, "Adding a Person in PeopleSoft Human Resources," Understanding Identification Assignment, page 109.

(JPN) Intercompany Transfer

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

Intercompany Transfer Flag Specify whether the data that you enter on the page is home or host company information. The system uses this value in conjunction with intercompany

 Copyright © 1988-2006, Oracle. All rights reserved.

transfer-related action or action reason codes to check the validity of the entries. Values are:

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

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

Company and **External Company**: Select the home or host company. The home or host company ID is a prompt value from the Company component (for internal company transfers) and the IC Trans External Company/Dept page (for external company transfers).

Business Unit: Select the home or host business unit for internal company transfers only. Your entry in this field controls the Department and Supervisor Level field values in the Internal Company group box due to setID functionality for business units.

Department and **External DeptID** (external department ID): Select the home or host department. The home or host department ID is a prompt value from the Departments component (for internal company transfers) and the IC Trans External Company/Dept page (for external company transfers).

Supervisor Level and **External Supv Lvl** (external supervisor level): Select the home or host supervisor level. This value is a prompt value from the Supervisor Lvl Table component (for internal company transfers) and the IC Trans External Superv Lvl page (for external company transfers).

Intercompany Transfer Start Dt (intercompany transfer start date): If you enter host data, enter the start date of this intercompany transfer.

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

Intercompany Transfer End Date: If you enter host data, enter the expected end date of this intercompany transfer.

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

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

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Setting Up the Payroll Process," Defining the Final Check Process

Chapter 12, "(JPN) Tracking Additional Appointments (Kenmu)," page 477

Chapter 13, "(JPN) Tracking Intercompany Transfers (Shukkou)," page 491

Chapter 15, "Updating Person and Job Information," Running Job Data Reports, page 576

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Working with System Data Regulation in HRMS"

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Working with Regulatory Regions"

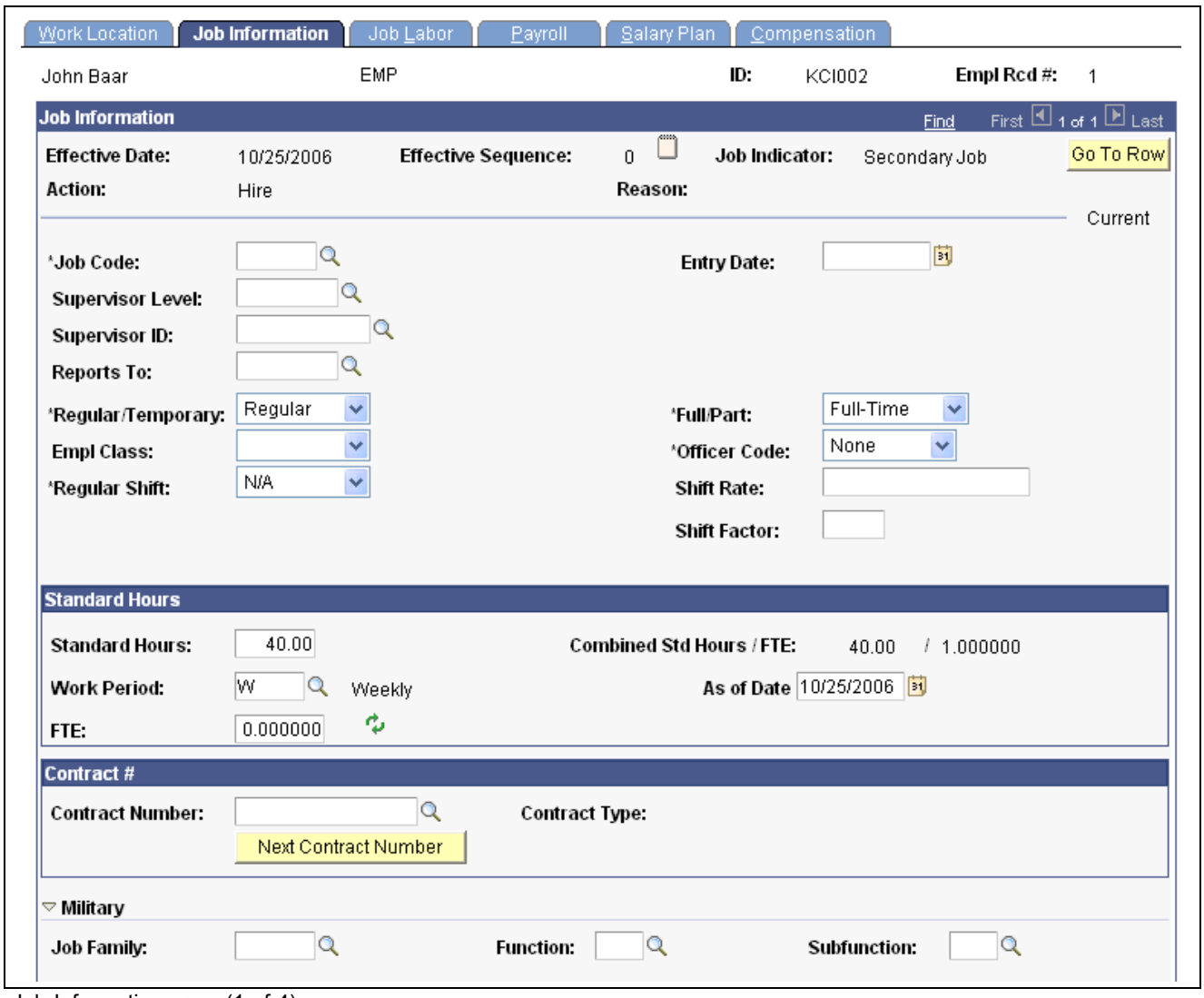
PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," Entering Company Information

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Processing Retro Pay"

Copyright © 1988-2006, Oracle. All rights reserved.

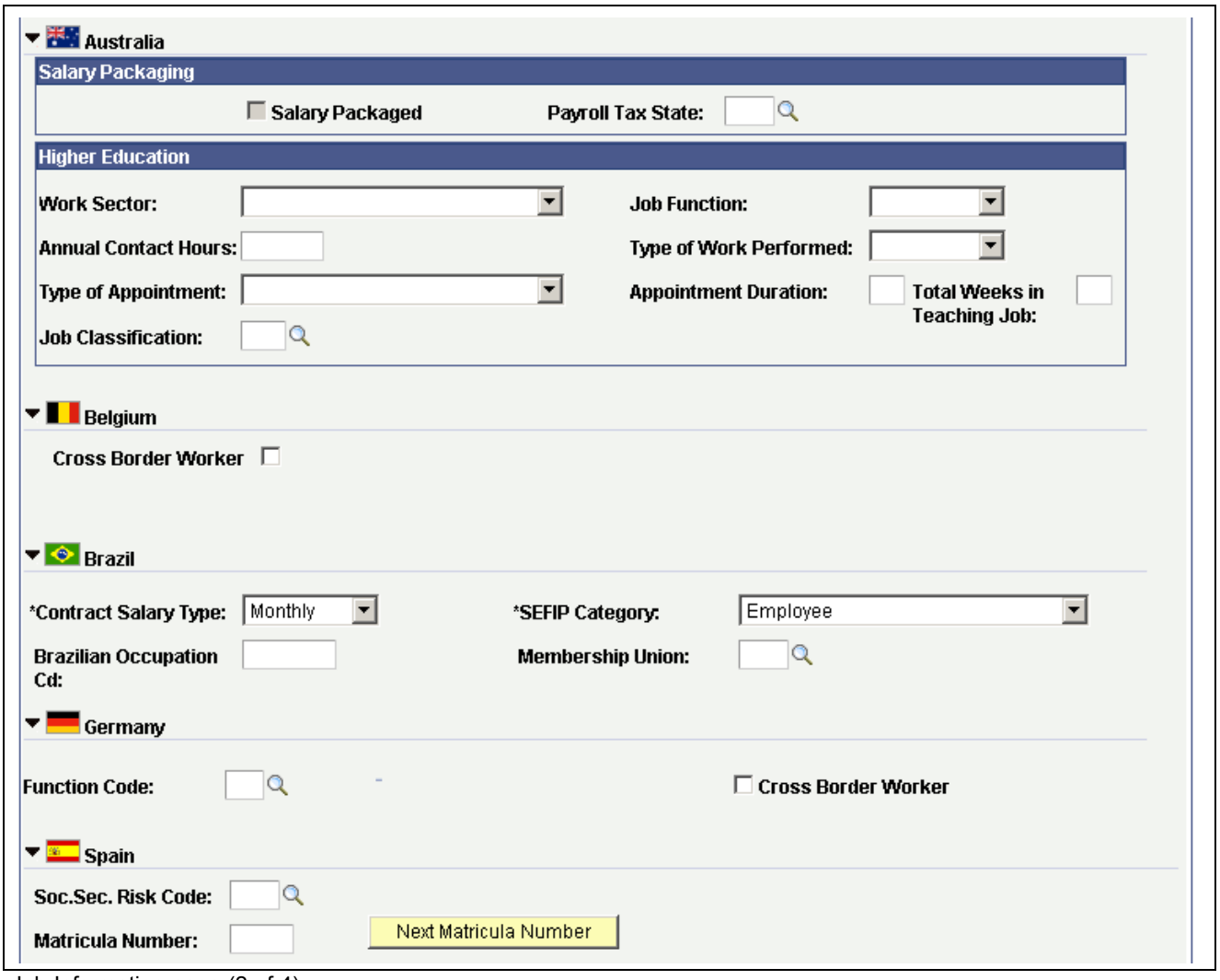
Entering Job Information

Access the Job Information page.



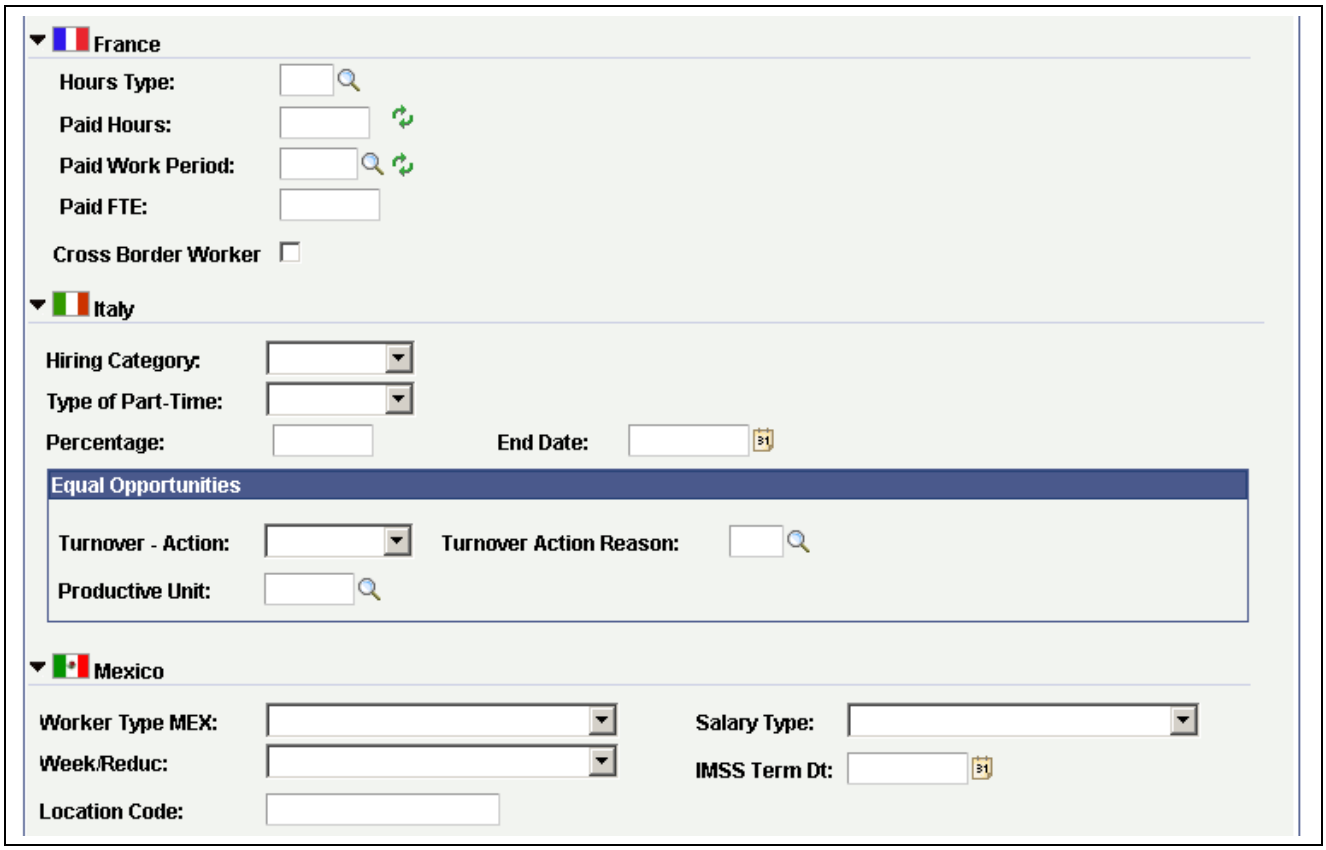
Job Information page (1 of 4)

Copyright © 1988-2006, Oracle. All rights reserved.

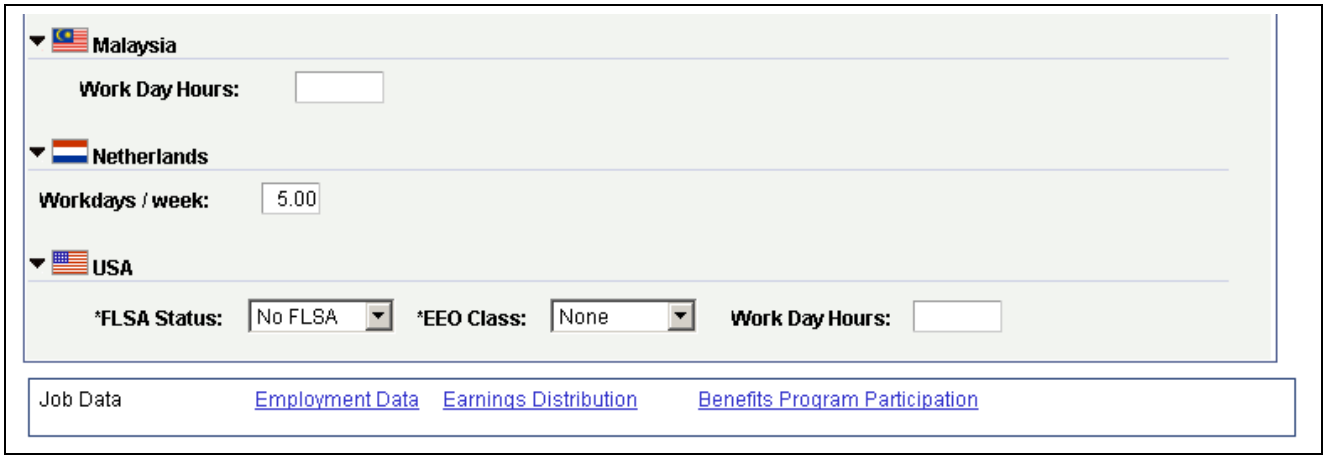


Job Information page (2 of 4)

Copyright © 1988-2006, Oracle. All rights reserved.



Job Information page (3 of 4)



Job Information page (4 of 4)

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

Job Code

If you have specified a job code for the position you associated with this person, the system enters a default job code and this field becomes unavailable for entry, unless you click the Override Position Data button on the Work Location page.

If you haven't assigned the person to a position, select the job code for this person.

Copyright © 1988-2006, Oracle. All rights reserved.

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

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

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Labor Administration*, "Setting Up Labor Administration Data," Assigning Job Codes to Labor Agreements.

Entry Date When you leave the Job Code field, the system displays the date on which the person is first assigned to this job code. If you are using position management, this field is unavailable for entry, unless you click the Override Position Data button on the Work Location page.

Supervisor Level Supervisor levels are a class of position that represent levels of some managerial or supervisory significance and can be used as another type of employee identifier.

If you have specified a supervisor level for the position you associated with this person, the system enters a default supervisor level and this field becomes unavailable for entry, unless you click the Override Position Data button.

If you did not assigned the person to a position, select the supervisor level code for this person, if applicable.

See Chapter 2, "Setting Up the Administer Workforce Business Process," Defining Additional Employment Setup Data, page 34.

Supervisor ID If you use position management, don't use this field. Use the Reports To field to identify the position number to which this person reports. This field is unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position and you assigned a manager ID to a department in the Department table, a default supervisor ID appears.

If you did not designate a manager ID on the Department table, enter a supervisor ID here, if applicable.

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

Reports To Displays the position number, title, and name of the manager associated with this position.

If you have specified a reports to number for the position you associated with this person, the system enters the default value and this field is unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position and you assigned a reports to ID to a department in the Department table, a default reports to ID appears.

If you did not designate a reports to ID on the Department table, enter a reports to ID here, if applicable.

Copyright © 1988-2006, Oracle. All rights reserved.

Regular/Temporary Defaults from the position number you associated with this person, and this field is unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position, the system displays the default value from the Job Code Table. You can override this value.

Full/Part Defaults from the position number you associated with this person, and this field is unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position, indicate whether the worker is full-time or part-time.

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

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

Empl Class (employee class) Select an employee class, which provides another method of grouping workers. Values include: *Assignee, Expatriate,* and *Intern.* Employee classes are included in the Employee Class table. To override, access this page in correction mode.

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

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

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

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements*, "(GBR) Meeting Regulatory Requirements for the United Kingdom".

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

Regular Shift Defaults from the position number you associated with this person, and this field is unavailable for entry, unless you click the Override Position Data button.

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

Copyright © 1988-2006, Oracle. All rights reserved.

Shift Rate If you selected the Specified at Employee level option on the Shift table, enter the shift differential for this worker and job.

Enter the shift differential as a rate (flat amount), a factor (percentage), or both. Use the first field to enter a flat amount and the second field to enter a percentage.

Note. To apply the same shift differential to a group of workers who work the same shift, enter shift information in the Shift table in Payroll for North America. If you specify the differential on the Shift table, the system does not use shift rate information from Job data.

See *PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook*, "Setting Up the Payroll Process".

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

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

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

Standard Hours

The standard hours fields defaults from the position number you associated with this person, and these fields are unavailable for entry, unless you click the Override Position Data button. If you have not assigned the person to a position or click the Override Position Data and change the job code, then the system populates the fields by default from the job code. You can override the defaults.

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

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

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

FTE (full-time equivalency) Displays the percentage of full-time work that the worker should normally work in this job. The system calculates this value based on the standard hours entry for this job and the standard work period. However, you can override the system-calculated FTE and enter any value. The system issues a warning if you enter a value that is greater than 1.0.

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

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

Copyright © 1988-2006, Oracle. All rights reserved.

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

Contract

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

Note. Existing contracts that have a value in the End Date field (the system displays this field on the prompt page) are not valid selections. The system populates the contract end date when the contract is terminated. If you know when the contract will end, enter the date in the Contract Expected End Date on the Contract Status/Content page.

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

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

See Chapter 8, "Entering Additional Data in Human Resources Records," Tracking Workforce Contracts, page 284.

Military

The Military check box must be selected on the Installation Table to view this section.

Information in this military section enables you to define an occupational group at the service member level to quickly identify which service members actually have specialty areas, such as a physician that is an orthopedic surgeon. Additionally, Australia Defense also uses job families, functions and subfunctions to derive pay for the service member. In Canada, a member with a particular specialty, for example, a light-wing pilot, may be paid an additional allowance. These values do not come from the job code.

Job Family Select a job family to categorize the job for this service member.

Function Select the code that best categorizes the job for this person by function, such as administrative, legal, or management. If you change the job family after entering the function, this field will be cleared.

Subfunction Enter a subfunction to further categorize the job function. If you change the job family for function after entering the subfunction, this field will be cleared.

Copyright © 1988-2006, Oracle. All rights reserved.

(AUS) Salary Packaging

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

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

(AUS) Higher Education

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

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

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

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

Job Classification Select the DETYA job classification.

(BRA) Brazil

Contract Salary Type Enter the contractual salary code for RAIS.

SEFIP Category Select the worker category for SEFIP.

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

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

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

(DEU) Germany

Function Code Select the appropriate code for the worker.

(ESP) Spain

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

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

Copyright © 1988-2006, Oracle. All rights reserved.

(FRA) France

Hours Type

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

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

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

Paid Hours

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

Paid Work Period

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

A: Annual

B: Biweekly

C: Contract

D: Daily

F: Every four weeks

M: Monthly

Q: Quarterly

S: Semimonthly

W: Weekly

Copyright © 1988-2006, Oracle. All rights reserved.

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

(ITA) Italy

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

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

Percentage Define the percentage of part-time.

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

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

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

(MEX) Mexico

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

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

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

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

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

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

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

(MYS) Malaysia

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

Copyright © 1988-2006, Oracle. All rights reserved.

(NLD) Netherlands

Workdays / week Enter the average number of working days per week. The default value is *5,* reflecting a full-time job. Enter *0* for standby workers who are only working on demand.

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

Note. From January 1, 2006, PeopleSoft Enterprise Global Payroll for the Netherlands no longer uses this field to calculate social security premiums for part-time workers. For further information refer to the *PeopleSoft Enterprise Global Payroll for the Netherlands 9.0 PeopleBook.*

See *PeopleSoft Enterprise Global Payroll for the Netherlands 9.0 PeopleBook*, "Tracking and Reporting Employee Social Security Contributions," Understanding Social Security Contributions.

(GBR) UK

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

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

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

(USA) United States

FLSA Status (Fair Labor Standards Act status) FLSA status indicates whether this job is exempt or nonexempt according to the Fair Labor Standards Act. FLSA status also helps determine benefits eligibility in PeopleSoft Enterprise Benefits Administration.

The FLSA status defaults from the position number you associated with this person, and this field is unavailable for entry, unless you click the Override Position Data button.

If you have not assigned the person to a position or you click the Override Position Data button and change the job code, then the system populates the fields by default from the job code. You can override the defaults

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

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

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

 Copyright © 1988-2006, Oracle. All rights reserved.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook

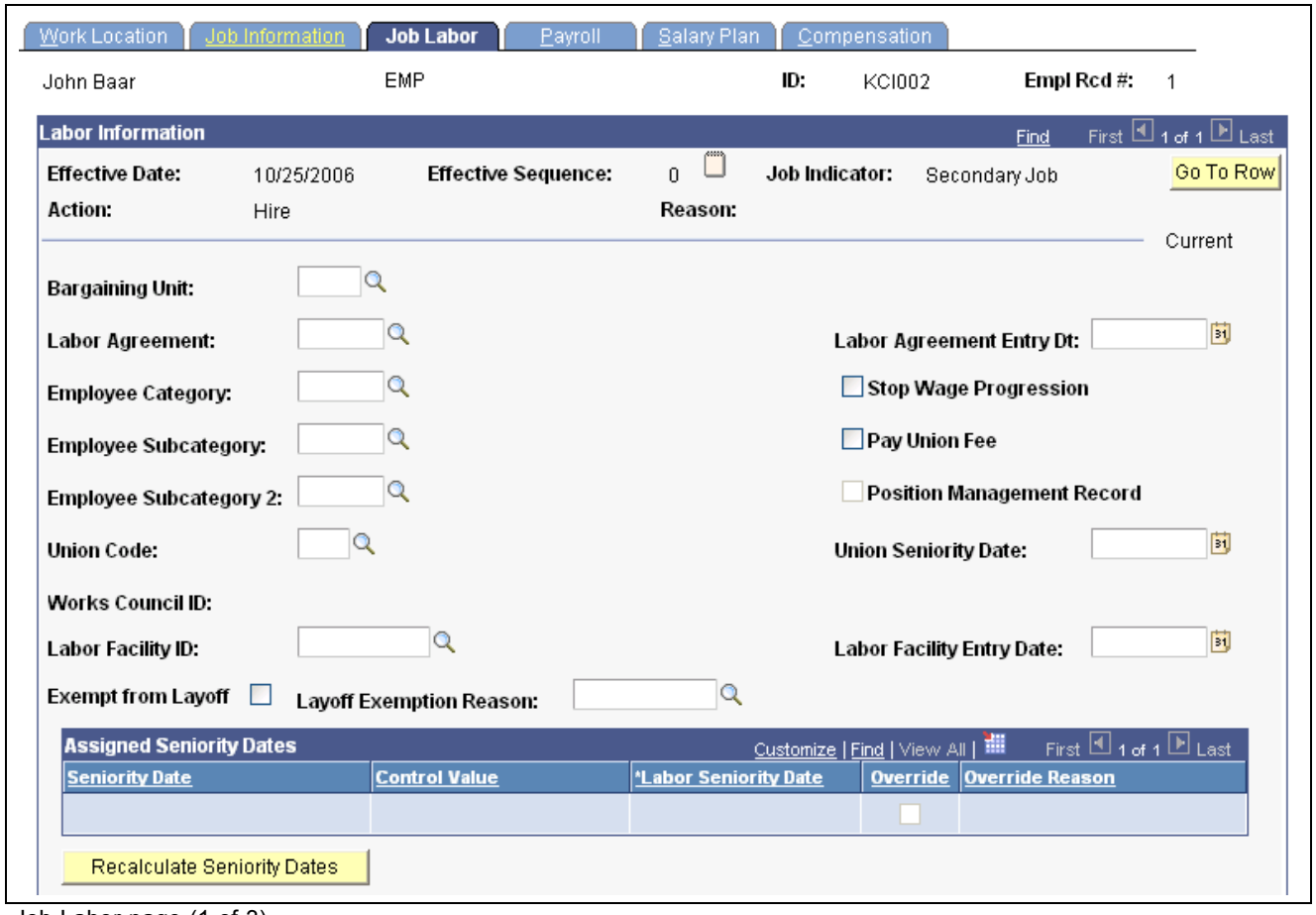
PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Working with Frequencies"

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up Jobs," Defining Job Subfunction and Job Function Codes

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Benefits, "Setting Up Base Benefits Core Tables"

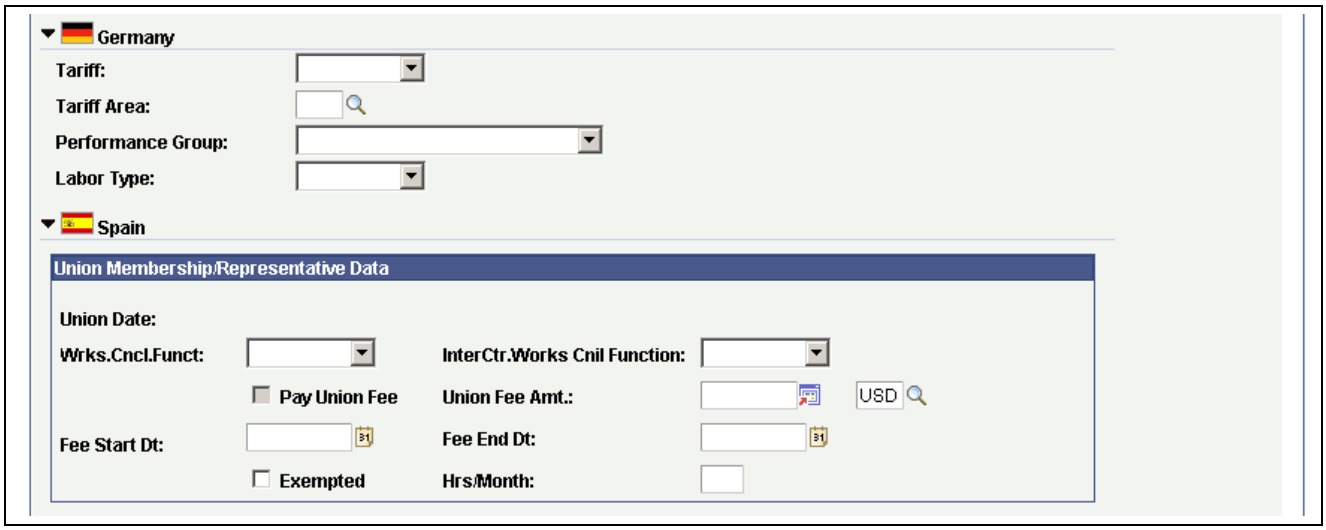
Entering National Labor Agreement Data

Access the Job Labor page.

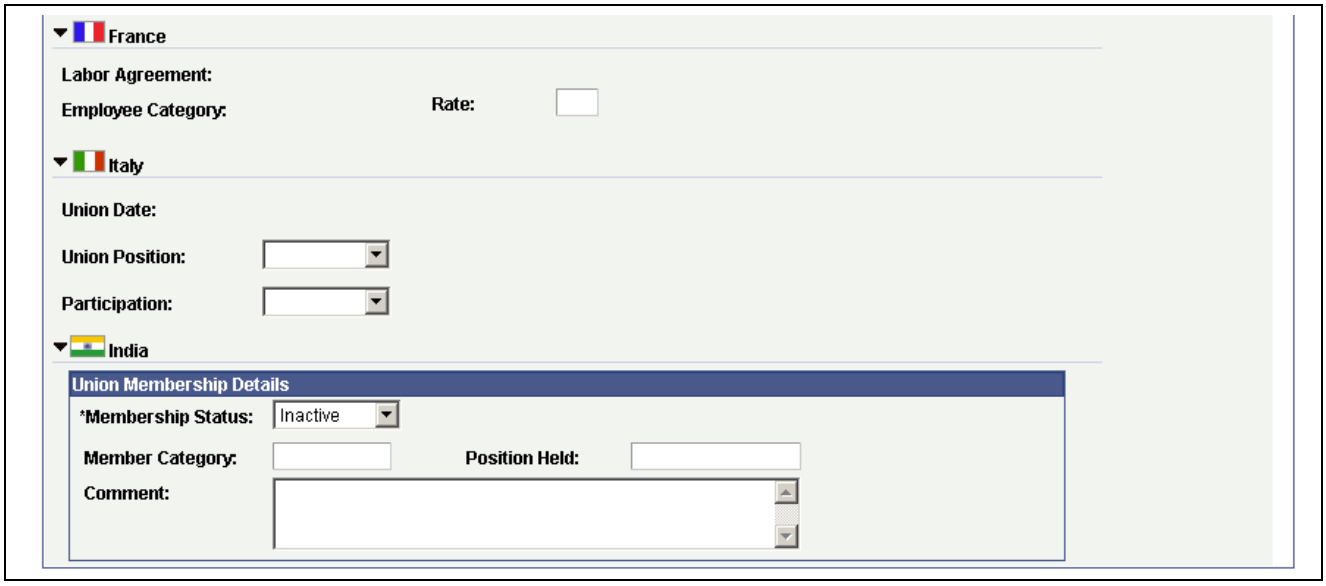


Job Labor page (1 of 3)

Copyright © 1988-2006, Oracle. All rights reserved.



Job Labor page (2 of 3)



Job Labor page (3 of 3)

Bargaining Unit Select a code representing the bargaining unit to which the employee belongs.

Labor Agreement Specify which labor agreement applies to this worker.

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

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

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

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

Copyright © 1988-2006, Oracle. All rights reserved.

Note. (FRA) This field is unavailable when France is selected as the regulatory region on the Work Location page. Subcategories for France are defined on the Labor Agreement Categories page.

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

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

Note. (FRA) This field is unavailable when France is selected as the regulatory region on the Work Location page. Subcategories for France are defined on the Labor Agreement Categories page.

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

Union Code This field defaults from the position number you associated with a person, and is unavailable for entry, unless you click the Override Position Data button.

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

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

Works Council ID Select the ID of the Works Council representing this employee.

Labor Facility ID Select the facility this worker belongs to.

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

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

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Labor Administration*, "Setting Up Labor Administration Data".

Assigned Seniority Dates

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

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

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

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

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Labor Administration*, "Setting Up Labor Administration Data," Defining Seniority Dates.

Copyright © 1988-2006, Oracle. All rights reserved.

(DEU) Germany

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

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

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

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

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

(ESP) Spain

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

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

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

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

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

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

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

(FRA) France

Rate — Enter the minimum salary calculation rate for this category. The rate is a three-digit number that is used in certain collective agreements to calculate the minimum salary for the subcategories, as defined on the Labor Agreement Categories page for the category. A subcategory can be associated with several possible rates, but only one rate is associated with the worker.

Copyright © 1988-2006, Oracle. All rights reserved.

(ITA) Italy

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

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

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

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

(IND) India

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

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

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

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

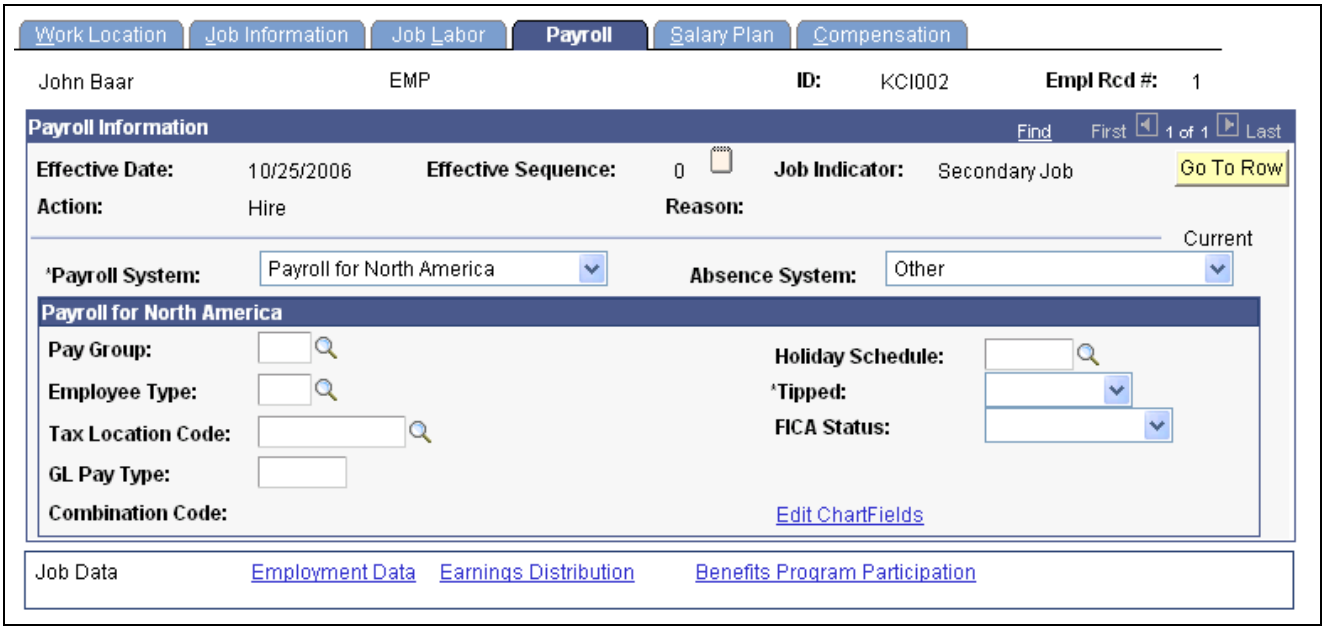
If you're managing a workforce in Canada or the U.S., you might want to review information about each union organization that the workers belong to and see a list of workers who are members. Use the Union Membership report (PER009) for this purpose. That report displays the worker ID, name, date hired,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

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions, "Managing Position Data"

Entering Payroll Processing Data

Access the Payroll page.



Payroll page

Copyright © 1988-2006, Oracle. All rights reserved.

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

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

Absence System Select the absence system that is used to process this person's absences.

Payroll for North America

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

Pay Group Select a pay group. Available values are the valid pay groups for the country selected on the Company table (not the regulatory region selected in the worker's job data).

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

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

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

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

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

Tax Location Code Select a tax location code. Available values are the valid tax locations for the country selected on the Company table (not the regulatory region selected in the worker's job data).

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

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

GL Pay Type (general ledger pay type) Organizations can use this field for customized general ledger interfaces. Payroll for North America does not use this field.

 Copyright © 1988-2006, Oracle. All rights reserved.

Combination Code (Optional) Select the appropriate labor distribution to which to post the hours and earnings for this person. Enter the general ledger combination code in the employee's job data only on an exception basis. If you do not want the employee's earnings charged to the default combination code that is mapped to the earnings code and department, you can enter a different combination code here. For example, you might want to temporarily charge the employee's earnings to a different department. Use Correct History mode to enter or remove the temporary combination code.

Edit ChartFields Click this link to access the ChartField common component for selecting ChartField values.

Global Payroll

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

Pay Group Select a pay group.

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

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

Use Pay Group Eligibility, Use Pay Group Rate Type, and **Use Pay Group As Of Date** When you select a pay group, these check boxes are automatically selected.

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

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

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

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

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

Copyright © 1988-2006, Oracle. All rights reserved.

being processed. Exchange rate effective dates include: *Period Begin Date, Period End Date,* and *Payment Date.*

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

(AUS) Australia

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

(HKG) Hong Kong

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

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

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

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

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

 Copyright © 1988-2006, Oracle. All rights reserved.

See Also

Chapter 10, "Managing Country-Specific Workforce Data," (USA) Determining U.S. Residency Status for Foreign Nationals, page 408

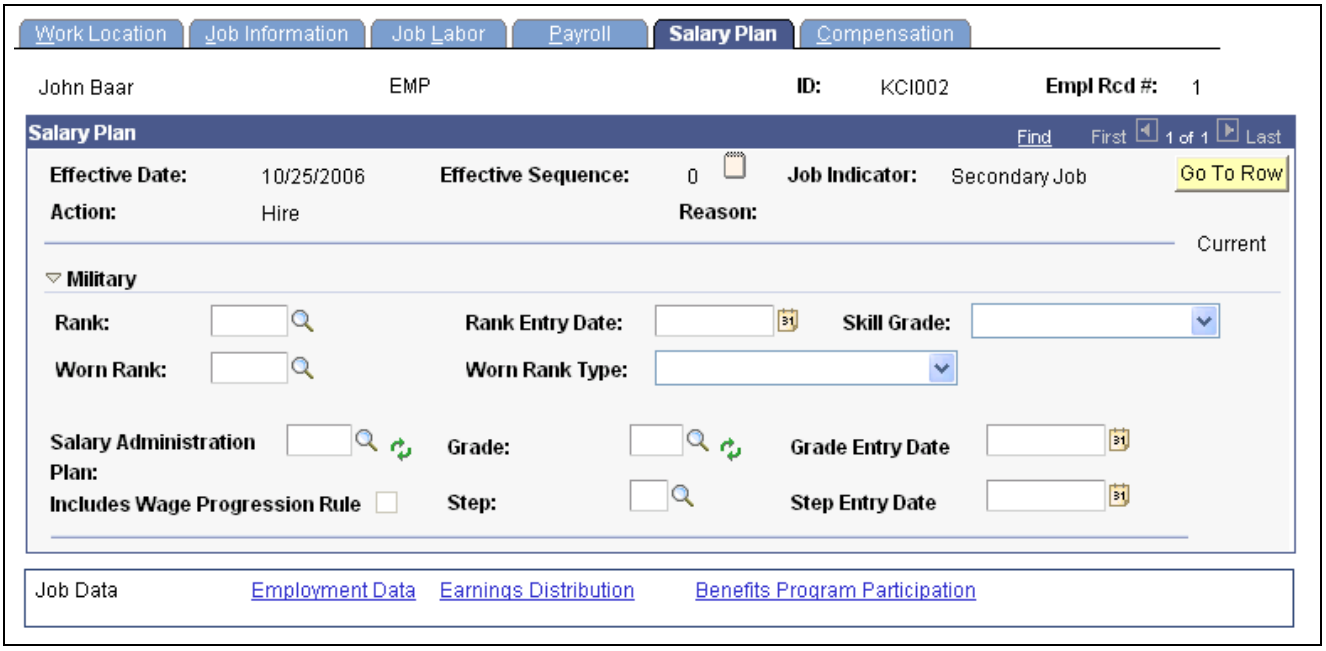
PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Compensation, "Getting Started with Administer Compensation," Administer Compensation Overview

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," Setting Up Holiday Schedules

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook

Entering Salary Plan Information

Access the Salary Plan page.



Salary Plan page

Military The section appears when military functionality is enabled on the Installation Table. Select a military service for a person on the Work Location page prior to entering a rank or worn rank.

Rank Enter the service member's earned rank. Valid ranks are defined on the Military Service - Service Ranks page.

Rank Entry Date Enter the date the member received this rank.

Skill Grade Select the overall grade level for which the individual has been evaluated

Worn Rank Enter the service member's rank insignia while serving in a particular post.

The default value for this field comes from the Rank field but it can be overwritten. Changes to the Rank field value will also change the value in this field.

Copyright © 1988-2006, Oracle. All rights reserved.

Worn Rank Type Indicate why the individual is on worn rank.

Note. When military rank information is defined for a service member, the system restricts the salary plan to those plans associated with military ranks on the Military Service table. In addition to this, only the salary grades associated with the specified ranks are available. Therefore, the salary defaulting logic does not apply to military users.

Salary Administration Plan Displays the salary administration plan code. This field will default from the position number you associated with a person, and is available for entry regardless if you click the Override Position Data button.

If you are not using position management and you associate salary administration plans with locations or job codes, the value that is in this field comes from either the Location or Job Code table, based on setID matching. You can override the default.

Note. If you have salary administration plans associated with more that one of these tables, the system uses the default from the last table value entered. For example, first you enter a location that is associated with salary plan KU02 where this salary plan defaults to this page. Then, you enter a job code that is associated with salary plan KU03, and the system will update the salary plan to KU03.

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

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

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

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

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

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

 Copyright © 1988-2006, Oracle. All rights reserved.

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

Step If you associate a step with the person's position or job code, the system displays the default value from the appropriate table.

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

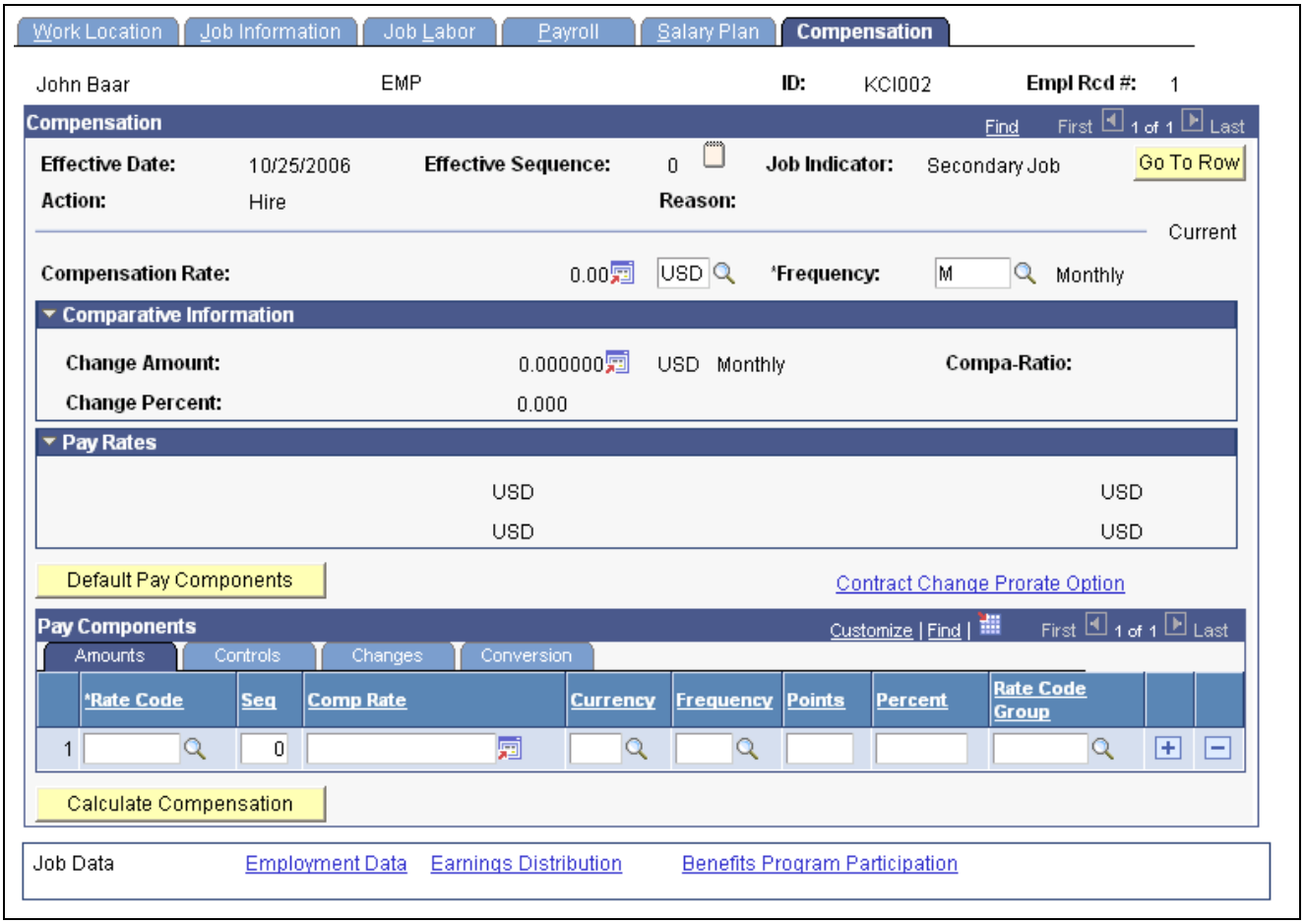
Note. The system verifies the combinations of salary administration plans and grades that you select.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Working with System Data Regulation in HRMS"

Entering Compensation Information

Access the Compensation page.



Compensation page

Compensation Rate Displays the compensation rate for the person, which is the sum of all base pay salary components.

Copyright © 1988-2006, Oracle. All rights reserved.

Frequency Select a compensation frequency.

Select *Contract* for contract persons. The system uses the information that you set up on the Contract Pay page to manage the person's compensation.

Note. The Retro Pay functionality in PeopleSoft Enterprise Payroll for North America and PeopleSoft Enterprise Global Payroll is triggered by any frequency or compensation rate change with an effective date that's earlier than or equal to the latest pay end date of a check that is already paid to the person.

AutoCalculated Premium

Target Compensation Rate Enter the compensation rate for the person if the person is being compensated at a rate that exceeds the default salary. Values are:

Absorbing: Premium decreases when the compensation rate increases over time in order to maintain the target compensation rate.

Non-Absorbing: Premium does not change even when the compensation rate increases over time.

The system calculates the difference between this amount and the original job compensation rate and enters the difference in the premium components (the absorbing or nonabsorbing or both premium rate codes of the salary plan) of the person's compensation package. The system then recalculates the compensation rate with the premium component compensation rate.

If both an absorbing rate code and a nonabsorbing rate code are associated with the salary plan, the absorbing rate code initially receives the full, calculated amount of the difference between the target compensation rate and the originally calculated job compensation rate.

You can then enter some portion of the total calculated premium in the nonabsorbing rate code (in which case the absorbing rate code amount automatically decreases by the same amount so that the target compensation rate remains the same) or delete the nonabsorbing rate code. The system recalculates the job compensation rate, including the premium component compensation rate.

You cannot enter a target compensation rate that is less than the original job compensation rate without the premium components.

This field is available only if the person's salary plan (on the Salary Plan page) has auto-calculated premium enabled.

Don't Absorb Change Select to instruct the system to leave absorbable rate codes unchanged if there is a change in the default salary amount.

This option only applies to persons who have a target compensation rate and are assigned to a salary plan with the auto calculated premium function enabled and an absorbing premium defined.

Comparative Information

Change Amount Displays the change in the amount of compensation for the rate code.

Change Percent Displays the percent of change in the compensation for the rate code.

 Copyright © 1988-2006, Oracle. All rights reserved.

Compa-Ratio (comparison ratio) Displays the percent-through-range calculation, based on the salary plan and grade and the currency that the organization uses.

Job Ratio Displays the percent-through-range calculation, based on the midpoint salary of the person's job code.

The job ratio is available only if the person's job code has job ratio information (midpoint salary, currency, and frequency) defined.

Pay Rates

This group box contains pay rates that are calculated by using the default frequencies from the country. You can specify the default frequencies by country on the Default Frequencies page.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Working with Frequencies," Setting Country-Specific Frequency Defaults.

Default Pay Components Click to:

- Carry out rate code defaults (excluding seniority pay) based on the current values of the designated job fields.
- Replace manual updates and old default values with the current default values.
- Recalculate the compensation package of affected persons, including the compensation rate, currency, frequency, apply FTE, percent (including current rate code groups), salary points, automatically calculated premium, and so on.
- Recalculate compensation-related fields, such as annual amounts or compa-ratio, on the Job Data record.

If you don't click this button after updating relevant job data fields, the system issues a warning when you attempt to save the new record. If you click OK, the system displays this page, where you can click this button and make any required changes. If you do not click this button, the component package doesn't appear by default until the next time that the default component logic is triggered (either when you click the button or through a batch update process).

Contract Change Prorate Option Click to make changes to the person's contract proration options.

Select one of the following options to prorate the earnings change over the remainder of the contract:

No Proration of Change Amt. (no proration of change amount): Select if you do not want the system to prorate the change to the person's compensation across the contract.

Prorate Over Contract Period: Select to have the system prorate the compensation change over the contract period (determined by the contract start and end dates).

Prorate over Payment Period: Select to have the system prorate the compensation change over the payment period (determined by the payment start and end dates).

Select Lump Sum Retro Payment (lump sum retroactive payment) to enable the system to process a lump sum payment of retroactive earnings to the

Copyright © 1988-2006, Oracle. All rights reserved.

person. You must select one of the contract change proration options that are listed previously to process the lump sum payment.

Calculate Compensation Click to have the system recalculate the person's compensation without carrying out any rate code defaults or replacing any default values. You cannot modify the person's pay components without recalculating the compensation.

Pay Components - Amounts

Select the Amounts tab.

Rate Code Select a rate code. Rate codes are IDs for pay components. The system inserts any compensation information that is associated with this rate code in the pay components grid.

Note. If a seniority rate code, or group-based rate code, is inserted as a default, the values for these rate codes are display-only; you can't delete them.

Comp Rate (compensation rate) Displays the compensation rate for the pay component.

Frequency Displays the compensation frequency for the pay component.

Points Displays the salary points that are associated with this rate code, if any. Set the points monetary value on the Company Table page. Associate point value (an integer) with rate codes on the Default Compensation and Non-Base Compensation pages, Salary Step Components page, and Compensation page. To use points, select the Salary Points check box on the Installation Table page.

Percent If the rate type for this rate code is percent, the system displays the percent that is to be applied to the job compensation rate or to a rate code group (if you are using rate code groups).

Rate Code Group Select a rate code group. A rate code group enables you to be more specific when calculating percentage-based components as part of a person compensation package.

Pay Components - Controls

Select the Controls tab.

Source Indicates how the pay component gets into the pay components grid. *Manual* indicates that the pay component is added manually. *Salary Step* indicates that the pay component is retrieved by default from the salary step. *Job Code* indicates that the pay component is retrieved by default from the job code, and so on.

Manually Updated This flag indicates whether the pay component is manually updated or the pay component contains only values that appear by default.

Default without Override Indicates whether you can change the default values of the pay component or the values for this rate code are default values and display-only.

Pay Components - Changes

Select the Changes tab.

Copyright © 1988-2006, Oracle. All rights reserved.

Change Amount	Displays the overall change amount in this pay component rate.
Change Points	Displays the overall change amount (in points) for this pay component. This field is visible only if Salary Points is selected on the Installation Table page.
Change Percent	Displays the overall change amount for this pay component. This field isn't available for rate codes that have a rate code type of percent or points.

Pay Components - Conversion

Select the Conversion tab.

Converted Comp Rate (converted compensation rate)	Displays the converted compensation rate for this pay component. The system converts all base pay components to the currency and compensation frequency that you specify.
Apply FTE (apply full-time equivalent)	Select if you want the value that is associated with the rate code to be multiplied by the FTE factor for annualization and deannualization. FTE is the percentage of full-time that the worker should normally work in the corresponding job. This field isn't available for rate codes of type percent.

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "(E&G) Administering Contract Pay"

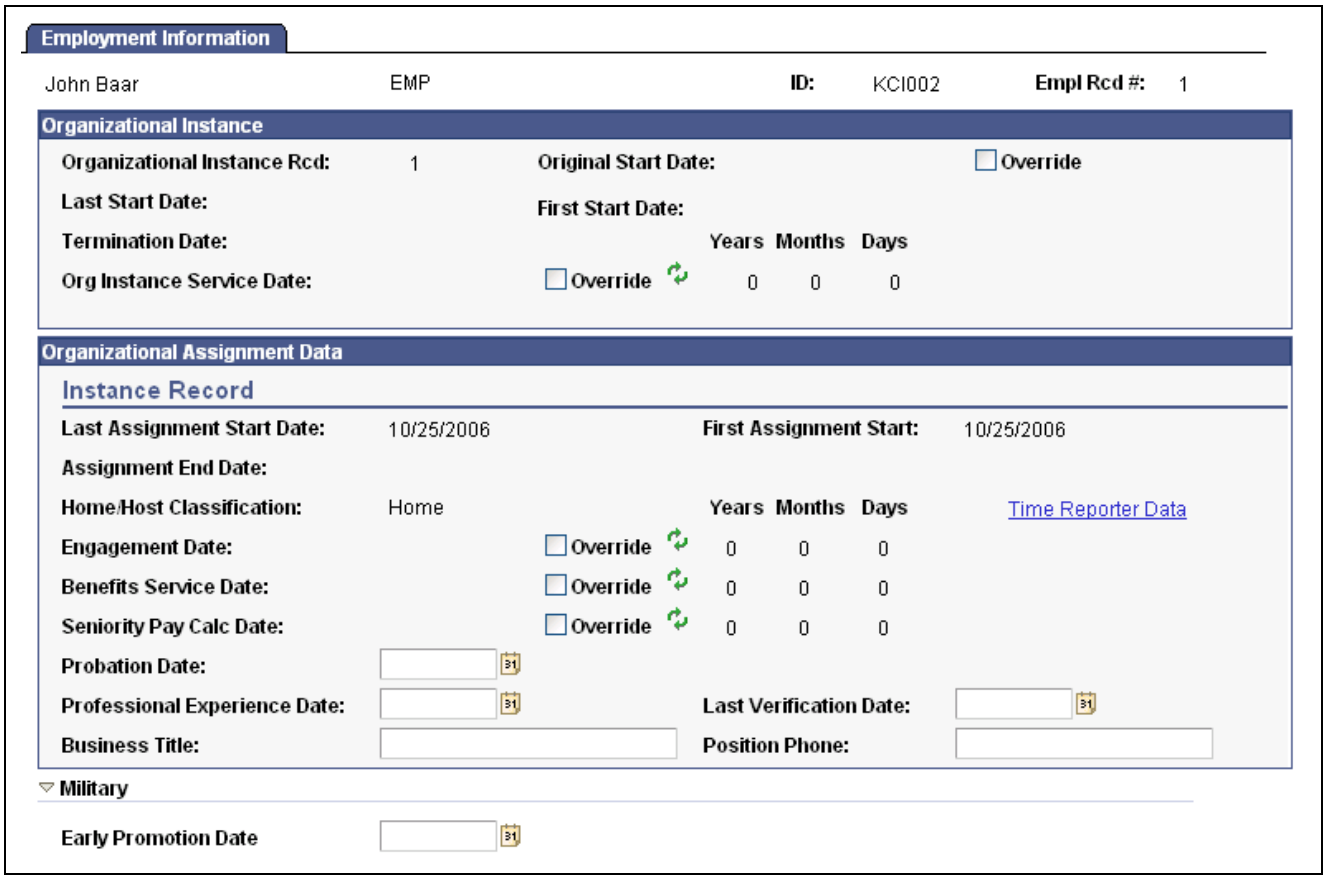
PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Compensation, "Getting Started with Administer Compensation"

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Working with Frequencies," Job Data Pay Rate Frequencies

Entering Optional Employment-Related Data

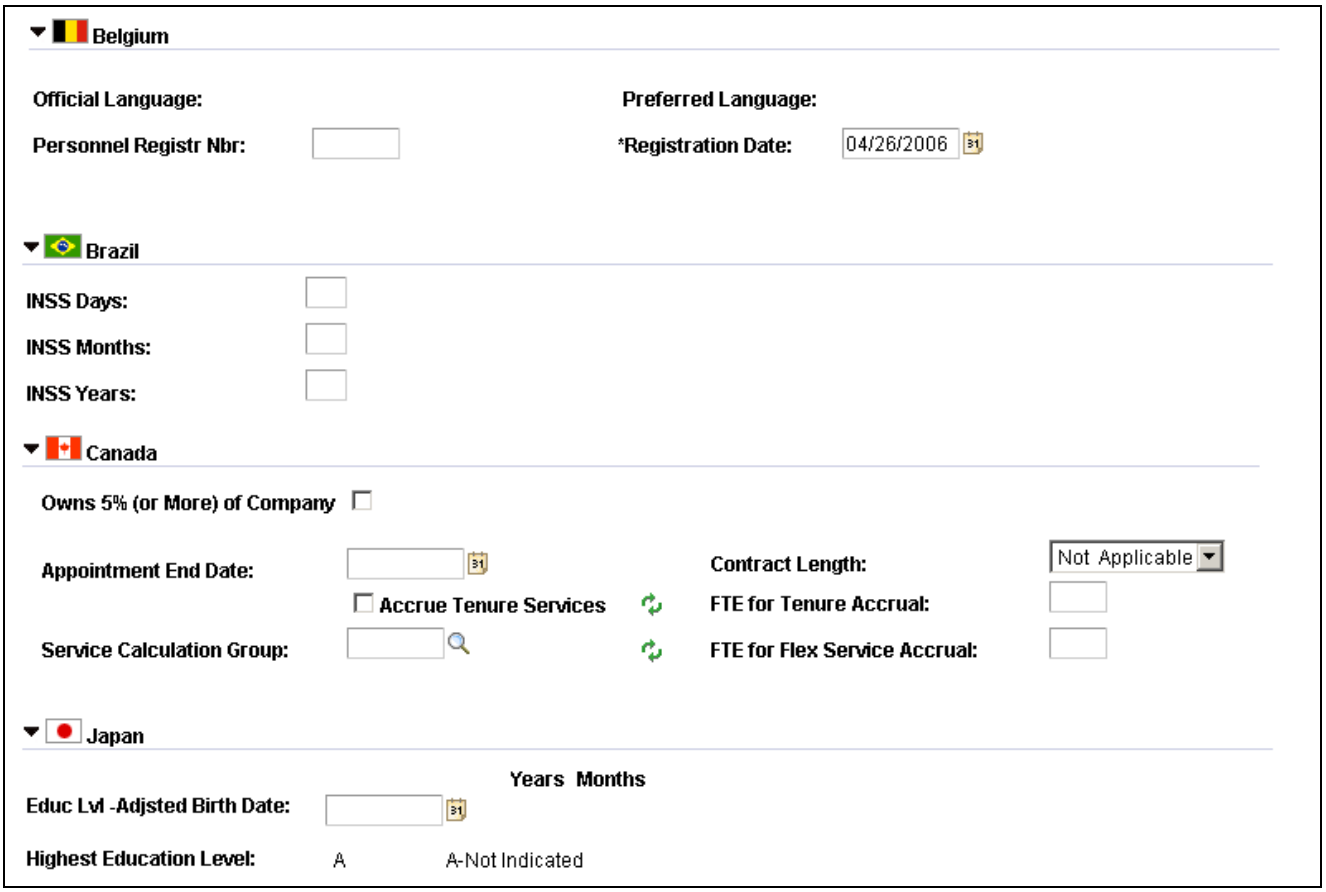
Access the Employment Information page.

Copyright © 1988-2006, Oracle. All rights reserved.

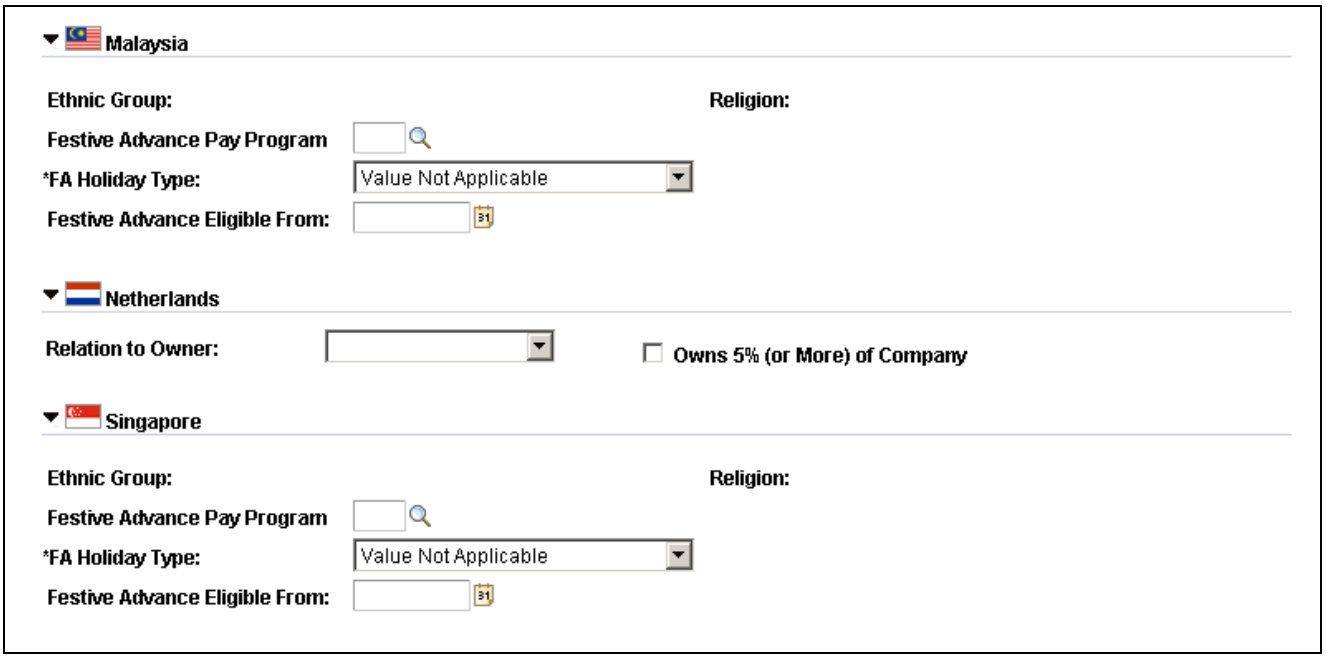


Employment Information page (1 of 4)

Copyright © 1988-2006, Oracle. All rights reserved.

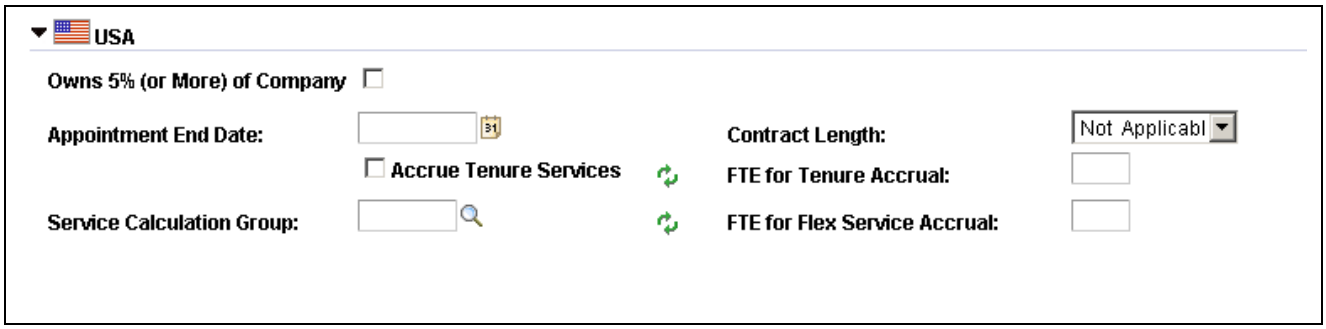


Employment Information page (2 of 4)



Employment Information page (3 of 4)

Copyright © 1988-2006, Oracle. All rights reserved.



Employment Information page (4 of 4)

Note. The dates on this page are used in reports and to enable you to track a person's work history.

Organizational Instance

Organizational Instance Rcd (organizational instance record)

The number of the instance associated with this job data record. The organizational instance record number is the same as the ERN of the controlling instance.

You can only modify the organizational instance dates when you review this page for the controlling instance.

Note. When you review this page for a non-controlling instance, the system makes the rest of the fields in this group box display only because non-controlling instances inherit the instance dates from the controlling instance.

Original Start Date

The system enters the system date on which you first created this job data record (emplID/ERN combination) in the system. This date is *not* the effective date of the first job data record or the effective date of the job data row with the action of *HIR*. You can override this date to enter an earlier start date, for example if the person has previously worked for the company or an affiliate.

Last Start Date

Displays the most recent start date for this organization instance. The system populates this field originally with the effective date of the controlling instance's job data row with the action of *HIR* and then refreshes it with the effective date of job data rows with the actions *REH* (for employees) or *RNW* (for contingent workers).

This date is different from the first start date if this organization instance has been inactive and then reactivated.

First Start Date

Displays the first start date for this organization instance. The system populates this field with the effective date of the first job data row with the action of *HIR* (for employees) or *ADD* (for contingent workers) from the controlling instance.

The system uses this date as the hire date in reports.

Note. The system does not refresh this date again unless you enter a new row in the controlling instance with one of these actions. You would normally not do this unless you needed to reset the hire date.

Termination Date

Displays the effective date of the controlling instance's job data row with the action of *TER* or *COM*, if applicable.

Copyright © 1988-2006, Oracle. All rights reserved.

If you rehire or renew a person's controlling instance, the system clears this field.

Org Instance Service Date (organizational instance service date) Displays the system date on which you first created this job data record (emplID/ERN combination) in the system. This date can be earlier the effective date of the first job data record or the effective date of the job data row with the action of *HIR*. You can override this date to enter an earlier service date, for example if the person has previously worked for the company or an affiliate.

Provider ID For contingent workers, displays the ID of the service provider.

Organizational Assignment Data

Assignments are the job data records tracked under an organizational instance, each identified by a unique emplID/ERN combination. Track the start and completion dates of individual assignments at the assignment level.

Last Assignment Start Date Displays the most recent start date for this assignment. The system populates this field with the effective date of the job data row with an action that reactivates the assignment. This date is different from the first assignment start date if this assignment has been inactive and then reactivated.

First Assignment Start Displays the first start date for this assignment. The system populates this field with the effective date of the first job data row with an action that activates the assignment (such as *HIR* or *ADD*).

Assignment End Date Displays the effective date of the job data row with the action of *TER* or *COM*, if applicable.

Home/Host Classification For workers who are on assignments, this field specifies whether the current job is at the worker's home location or the assignment location. For a new hire, select *Home*.

Time Reporter Data Click to review the PeopleSoft Time and Labor data for this worker. If you don't use PeopleSoft Enterprise Time and Labor, this link is unavailable.

Company Seniority Date or **Engagement Date** This field normally displays as the Company Seniority Date field. However, when military functionality is enabled on the Installation Table and this person is a person associated with a rank, this field displays as the Engagement Date field. Based on the date that you enter here, the system calculates the number of years, months, and days of seniority or engagement for a person.

Benefits Service Date Based on the date that you enter here, the system calculates the total years, months, and days of service for a worker, including any credit for military leave or the total amount of time that the worker works for multiple companies in the organization. This date is used to calculate benefits eligibility.

The system uses the original start date as the default value.

Seniority Pay Calc Date (seniority pay calculation date) Enter the date that the system should use to calculate seniority-based pay.

The system uses the original start date as the default value.

Probation Date Enter the date on which the worker is placed on probation.

Professional Experience Date Displays the earliest date on which the worker started working in a job that required skills that are directly related to the worker's current position.

Copyright © 1988-2006, Oracle. All rights reserved.

Last Verification Date Displays the latest date on which the worker verified his or her personal data in the system.

Business Title Enter the worker's official title, which might be different from the job title. If you drive part or all of the system by position, the system enters the default title for the position number that you assign to the worker on the Work Location page.

Position Phone Track the worker's primary work phone number. You can also update this field by using the Add/Update Position Info pages.

If you drive part or all of the system by position, the system enters the default phone number for the position number that you assign to the worker on the Work Location page.

Note. When you enter a new row with an action of *HIR* or *ADD*and save the component, the system sets the Company Seniority Date , Benefits Service Date, and Seniority Pay Calc Date (Seniority Pay Calculation Date) fields on this page to the effective date that you enter on the Work Location page. You can override these fields after saving the component. The system calculates and displays the worker's service months and days based on the information that you enter in the Company Seniority date, Service Date, and Seniority Pay Calc Datefields.

Military

The system displays the military section when military functionality is enabled on the Installation Table.

Early Promotion Date Enter the earliest date this service member may be considered for the next promotion.

(BEL) Belgium

The system displays the official language, based on the company official language, unless the company is located in Brussels-Capital Region, in which case the preferred language is the default.

Personnel Registr Nbr (personnel registration number) Enter the number under which the worker is registered in the personnel register.

(BRA) Brazil

INSS Days, INSS Months, and **INSS Years** (*Instituto Nacional de Securidade Social* days, months, and years) Enter the number of days, months, and years that the worker makes social security contributions before being hired by the company.

(CAN) Statistics Canada Academic Teaching Employment Table

The fields in this table are used in the Canada Academic Teaching Surveys business process, a regulatory requirement for Canadian higher-education, degree-granting institutions. Complete this table for all faculty staff if you are required to submit Academic Teaching Surveys to Statistics Canada. Review the information in this table to ensure that it is up-to-date every time that you change a worker's record.

Teaching Change Date The system adds a new teaching change date row only if you choose to add one.

 Copyright © 1988-2006, Oracle. All rights reserved.

Insert a new row for each teaching appointment if the institution uses the same employee record number to record successive appointments. For the Part-Time Academic Teaching Survey, the system reports the Academic Teaching Employment record that is effective on the end date of the appointment or at the end of the period that is being reported.

Survey Report Flag — Displays the report flag value, as specified on the Job Code Table - Job Code Profile page. If the value is *N/A,* this record isn't reported in academic teaching surveys. You can override this default value.

Duties — Displays the duties value, as specified on the Job Code Table - Job Code Profile page. You can override this default.

Principal Subject — Select the principal subject that is taught by the worker.

Teaching Load — Enter the worker's teaching load during the academic teaching employment. For example, if the worker is teaching three full courses, enter *3.0.* If the worker is teaching one full course and one-third of another, enter *1.33.*

FTTE (full-time teaching equivalency) — Enter the ratio of the teaching load to the full-time teaching equivalency. For example, if teaching four courses constitutes full-time and the worker is teaching three courses, enter *.75.*

Collapse as FT (collapse as full-time) — Select if the employment can be collapsed into the reportable full-time job for the purpose of consolidating salary amounts from jobs that make up a full-time job.

Use this field only if the worker:

- Has two or more part-time jobs in different departments that function as a single full-time job.
- Receives an administrative stipend under another employee record number that doesn't accrue benefits but counts toward the worker's full-time salary.

Don't collapse reportable part-time jobs into a reportable full-time job. (The system doesn't report on the part-time job.) Instead, if you use this field, set up a separate employee record for part-time jobs.

(JPN) Japan

Educ Lvl-Adjsted Birth Date (education-level-adjusted birth date) — Select the worker's education-level-adjusted birth date. The day and the month are the organization's standard calculation birth date (SCB—usually April 1); the year comes from the worker's education-level-adjusted birth date (ELABi). Although the system calculates this date, you can overwrite it (for example, to give a worker credit for special work experience).

Years Months — Displays the worker's highest education level as specified in the Personal Data component. This education level is the starting point for education-level age-related calculations.

(MYS and SGP) Malaysia and Singapore

After you set up festive advance calculation rules and the pay programs, and associated job codes with pay programs, the eligible workers that are in the workforce are granted festive advances. Assigning the festive advance type to the worker occurs during the hire process after you assign the ethnic group, religion, and job code. However, before you accept those defaults, you might still have some issues to resolve. If you decide that any of the worker's festive advance details should be different, change them on this page.

Copyright © 1988-2006, Oracle. All rights reserved.

Ethnic Group and **Religion** — Displays the values that you enter on the Personal Data - Regional page.

Festive Advance Pay Program — Displays the value from the Job Code Table - Job Code Profile page. You can change this default.

FA Holiday Type (festive advance holiday type) — Select a festive advance type. Values are: *Chinese New Year, Christmas, Deepavali, Hari Raya,* and *N/A*.

The default value is the festive holiday that is appropriate to the ethnicity or religion that you enter for this person on the Personal Data - Regional page. You can change this selection. If a person chooses not to receive a festive advance, select *N/A*.

Festive Advance Eligible From — Displays the festive advance eligible from date. If the firm has a probation period that must be served before a worker is entitled to a festive advance, the probation period must be monitored.

When you set the probation period in the Festive Advance Pay Program, you set the number of days or months. The system adds this information to the worker's hire date to determine the festive advance eligible from date; this date appears as the default on the FA Employee Details page.

When you process the festive advances, the system checks the festive advance eligible from date against the date on which to pay the advance. If the festive advance eligible from date is not yet passed, the worker is not paid a festive advance.

Note. This date is used by the festive advance calculation process and the festive advance calculation rule to determine if the worker has served enough time to be eligible for a festive advance. The date is derived from the job commencement date and the probation period in the Festive Advance Pay Program.

(NLD) Netherlands

Relation to Owner — Select the worker's relationship to the owner, as appropriate.

(USA) USA

Accrue Tenure Services — Select to activiate the tenure accrual.

FTE for Tenure Accrual — Enter the FTE to be used in tenure accruals. FTE cannot be greater than 1.0. On multiple jobs, the sum of the FTEs of all the jobs selected to accrue tenure cannot be greater than 1.0.

Service Calculation Group — Select the service calculation group that represents a group employees who have the same calculation rules applied to their service accrual process.

FTE for Flex Service Accrual — Enter the FTE value to be used in prorating the worker's accrued service.

Copyright © 1988-2006, Oracle. All rights reserved.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Track Global Assignments, "Tracking Assignments," Entering Basic Assignment Data

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up Local Country Functionality," Setting Up the Education Level Age Table

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Festive Advance, "Managing Festive Advance"

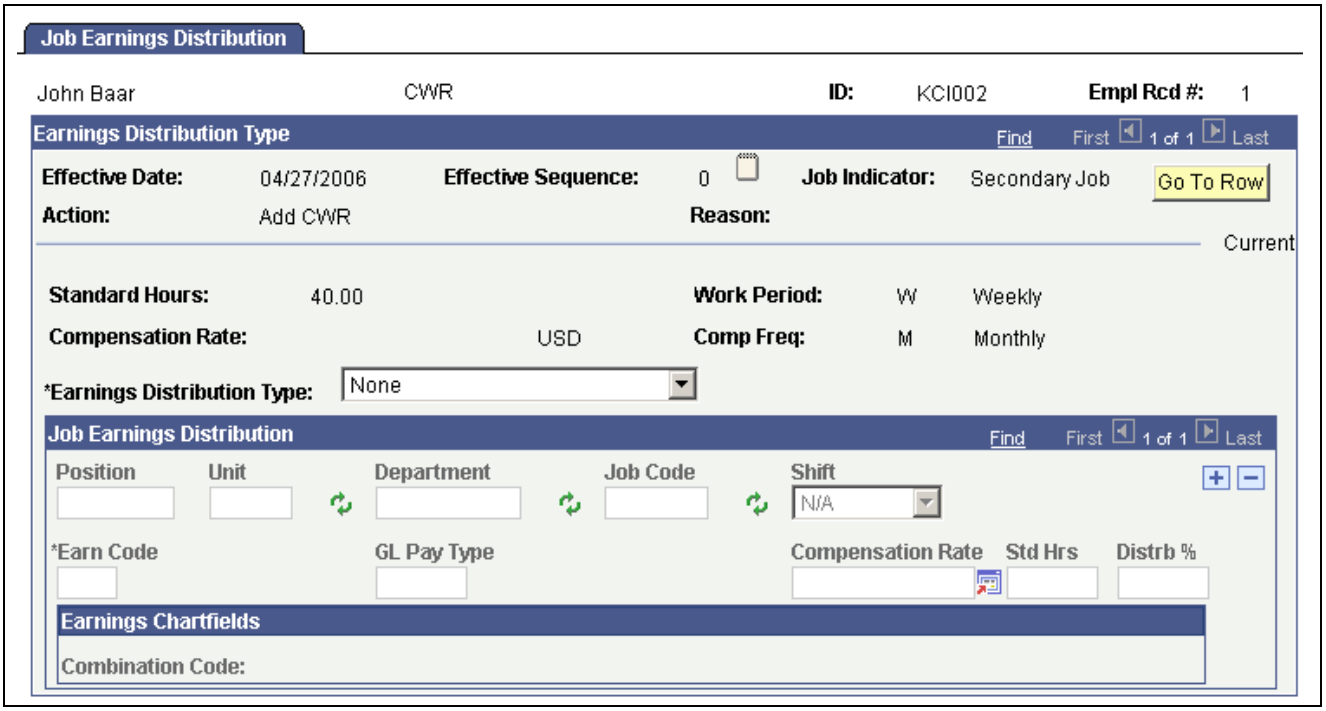
PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Benefits, "Setting Up Base Benefits Core Tables"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions, "Setting Up Positions"

PeopleSoft Enterprise Time and Labor 9.0 PeopleBook, "Setting Up Basic Tables"

Distributing Job Earnings

Access the Job Earnings Distribution page.



Job Earnings Distribution page

Review these guidelines prior to entering data on the Job Earnings Distribution page:

- Skip this page if you don't need to distribute standard earnings for the person.

  Payroll for North America uses the department, job code, account, shift, position number, and general ledger type that you enter on the Work Information and Payroll pages to calculate pay earnings records.

- The system hides this page when all job rows in the component use PeopleSoft Enterprise Global Payroll.

  However, if any job row has another payroll system (for example, PeopleSoft Enterprise Payroll for North America or Payroll Interface), then the system displays the page.

Copyright © 1988-2006, Oracle. All rights reserved.

- Don't use this page to distribute special earnings, such as holiday pay or bonuses; instead, use the processes in PeopleSoft Enterprise Payroll for North America for handling special earnings.
- If you enter a parameter such as department on this page, the parameter overrides the same field on the job record.

  If you leave a parameter blank, the system uses the field from the job record.

Standard Hours and **Work Period** If you are using position management and click the Override Position Data button, these fields become available. If you change these values on this page, it will also update the same fields on the Job Information page.

Earnings Distribution Type Select an earnings distribution type. Values are:

- *None:* Select to indicate that you don't allocate earnings for this person. The system calculates and charges person compensation according to the information that is listed in the Job Data component. If you select this option, leave the other fields on this page blank.

  Note. You must select *None* if you want the system to use the proration rule that you select on the Pay Group Table - Paysheets page when prorating partial pay.

  See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up Jobs," Understanding Pay Groups.

- *By Amount:* Available only for salaried workers. This enables you to apportion the worker's total earnings for a period on the basis of an amount.

  Select to instruct the system to total the amounts that are in the distribution lines and check the total against the total in the Compensation Rate field on the Job Data - Compensation page. The total earnings distribution amount must equal the compensation rate amount. If the amounts are not the same, the system generates an error when you try to save the record. You will need to resolve the discrepancy to save the Job Data record.

  For example, to charge 3,000 of a worker's regular earnings to the worker's regular department (on the job record), 544 to department 105, and 1,000 to department 10503, you set up three distribution lines:

  - On the first line, leave Department blank (so that the system uses the worker's regular department from the job record) and enter *3000* in the Amount field.
  - On the second line, enter *105* in the Department field and *544* in the Amount field.
  - On the third line, enter *10503* in the Department field and *1000* in the Amount field.

  The amounts that are in the distribution lines total 4,544, so the system checks that amount in the Compensation Rate field on the worker's job record equals this total.

- *By Hours:* Available only for hourly or exception hourly workers. Select to instruct the system to total the hours that are in the distribution lines and update the total in the Standard Hours field on the Job Data - Job Information page. The Standard Hours field that appears at the top of this page also changes.

 Copyright © 1988-2006, Oracle. All rights reserved.

Enables you to apportion the worker's total earnings for a week on an hourly basis. The system totals the hours in all distribution lines and inserts the total in the Standard Hours field on the worker's job record.

For example, if a worker works a 40-hour week, and you want to charge 30 hours of regular pay to the worker's regular department (on the job record) and 10 hours to department 103, you set up two distribution lines:

- On the first line, leave Department blank (so that the system uses the worker's regular department (from the job record) and enter *30* in the Standard Hours field.
- On the second line, enter *103* in the Department field and *10* in the Standard Hours field. The hours that are in the distribution lines total 40, so the system inserts *40* in the Standard Hours field on the worker's job record.

• *By Percent:* Available to all workers. The sum of the percentages that are in the distribution lines must equal 100.

Enables you to apportion the worker's total earnings for a period on a percentage basis.

For example, to charge 80 percent of regular earnings to the worker's regular department (on the worker's job record) and 20 percent to department 100, set up two distribution lines:

- On the first line, leave Department blank (so that the system uses the worker's department from the job record) and enter *80* in the Percent field.
- On the second line, enter *100* in the Department field and *20* in the Percent field.

Paying Workers on Disability

Some workers on disability need to be paid at a given percentage of their regular pay. Handle this situation without changing the worker's salary by setting up a disability plan earnings code in the Earnings table, based on a percentage.

Note. This feature works only for hourly workers, not for salaried workers.

When you enter an action of short-term disability with pay or long-term disability with pay, the system changes the worker's status to leave with pay.

To send 100 percent of the worker's pay to the disability plan earnings code, access the Job Data - Job Earnings Distribution page, select the By Percent option, enter the appropriate disability earnings code, and enter a percent of *100*.

Note. When you put a worker on disability, don't forget to check additional pay records and make any necessary changes.

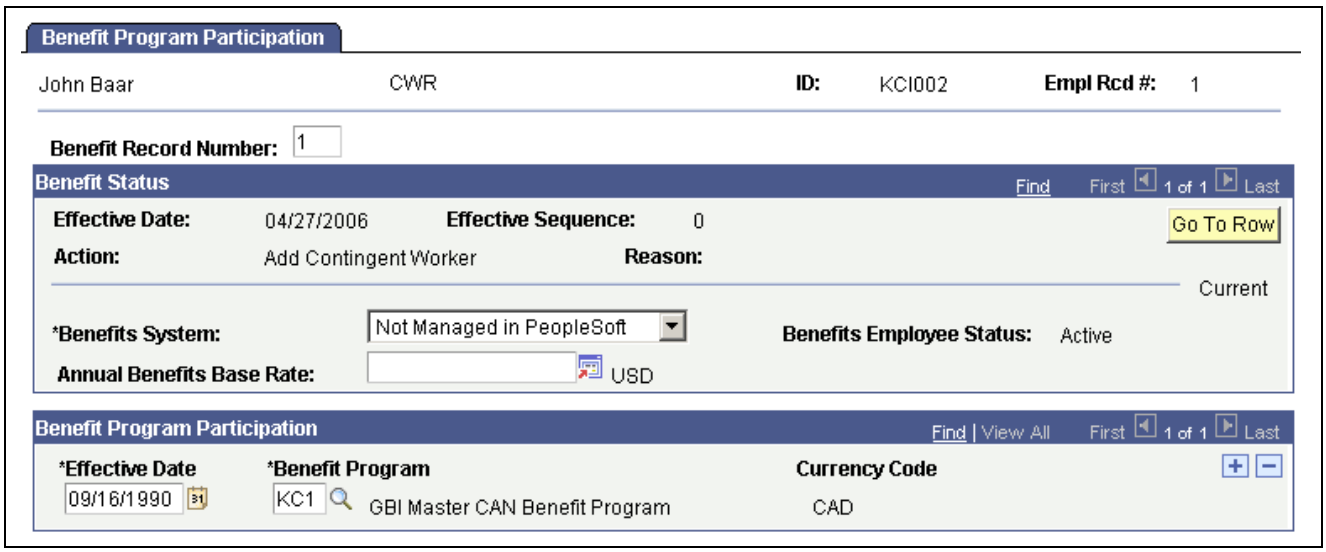
See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Defining Earnings Codes and Earnings Programs"

Copyright © 1988-2006, Oracle. All rights reserved.

Specifying Benefit Program Enrollment

Access the Benefit Program Participation page.



Benefit Program Participation page

Benefit Record Number Displays the benefit record number, which is an identifier that links two or more jobs for benefits purposes. The system sets the value to *0*. You can override this value to attach this job to a different benefit record number. The system clears the benefits program data and repopulates it with values that are attached to the benefit record number that you enter.

Benefits System Select the appropriate benefits system. Select *Not Managed in PeopleSoft* (benefits managed by a system other than PeopleSoft) to filter out persons who have insufficient employment and job information to support benefit enrollment.

Benefits Administration Eligibility

Elig Field 1–9 (eligibility configuration fields 1−9) Enter values to further filter persons' eligibility for a specific benefit. These are client-definable fields.

Benefit Program Participation

Benefit Program Displays the code that corresponds with the benefits program for the person's pay group, which you specify in the Pay Group table. You can override this value.

Currency Code Displays the code of the currency that is specified for the benefit program in the Benefit Program table.

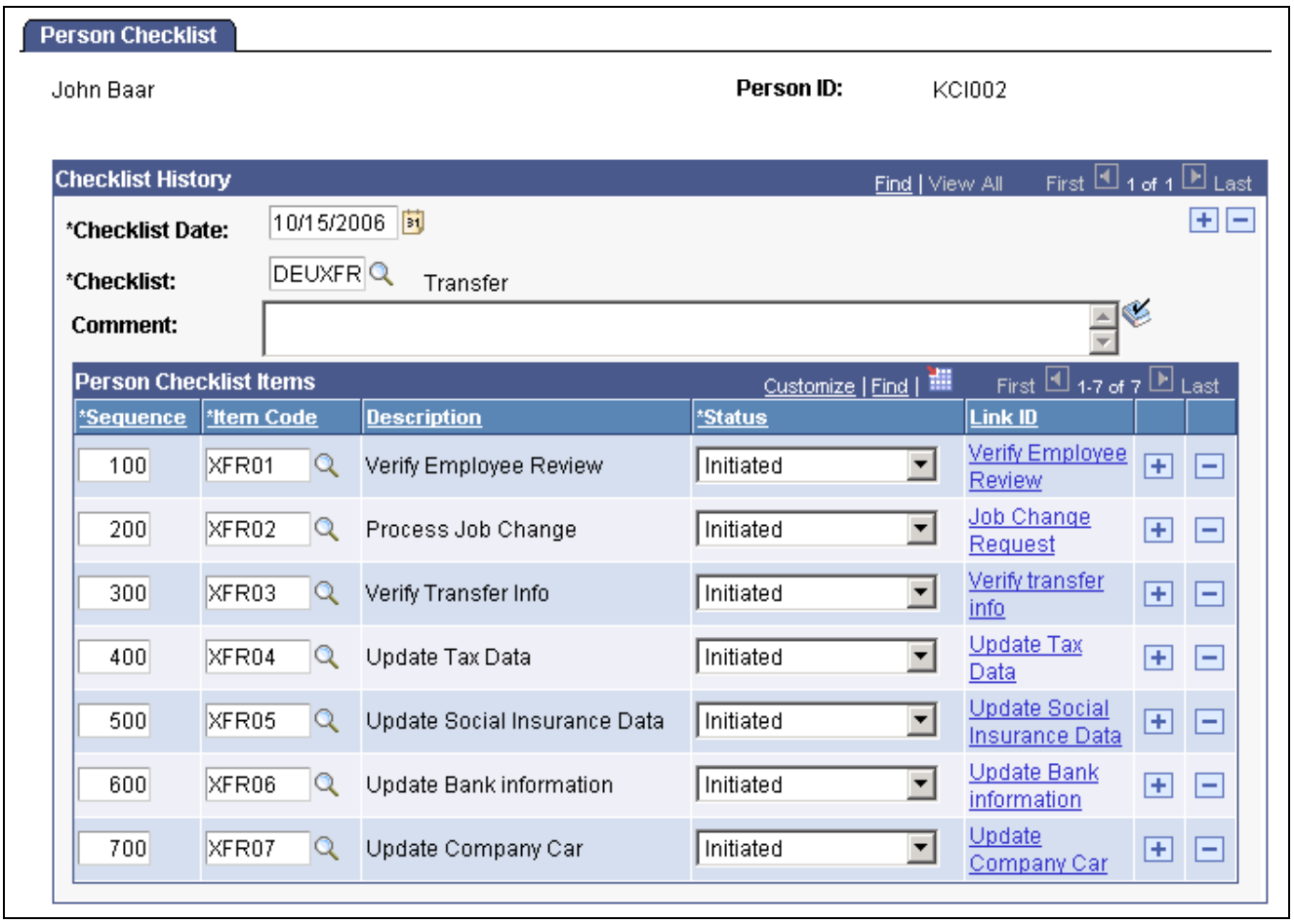
See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Benefits, "Setting Up Base Benefits Core Tables"

Copyright © 1988-2006, Oracle. All rights reserved.

Creating a Person Checklist

Access the Person Checklist page.



Person Checklist page

You can have more than one checklist active for a person at any one time.

Checklist Select the appropriate checklist. The system populates the list with the associated items.

Person Checklist Items

The system populates this table when you select a checklist. You can add additional items.

Item Code Displays the checklist item if you selected a checklist. To add items without a checklist, select the item.

Status The system displays a status of *Initiated* for all new checklist items. Update the status from the following options as necessary:

- *Completed*
- *Notified*
- *Received*

Link ID Displays a link to the component used to complete the listed item.

Copyright © 1988-2006, Oracle. All rights reserved.

For example, the link ID for the item Emergency Contact is Emergency Contact, which links to the Emergency Contact component (EMERGENCY_CONTACT).

Defining Applicant Referral Information

Access the Person Applicant Information page.



Person Applicant Information page

Source ID Select a referral source for this person.

Referral sources are defined using the Source Setup page.

See *PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook*, "Setting Up Third Party Integrations," Setting Up Recruitment Sources.

SubSource ID Select a subsource for this person.

Subsources are defined on the Marketing page.

See *PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook*, "Setting Up Third Party Integrations," Setting Up Recruitment Sources.

Employee Referral ID This field is available if the Source ID field equals *Employee.*

Select the employee who referred this person.

Specific Referral Source Enter any text that further defines the referral information.

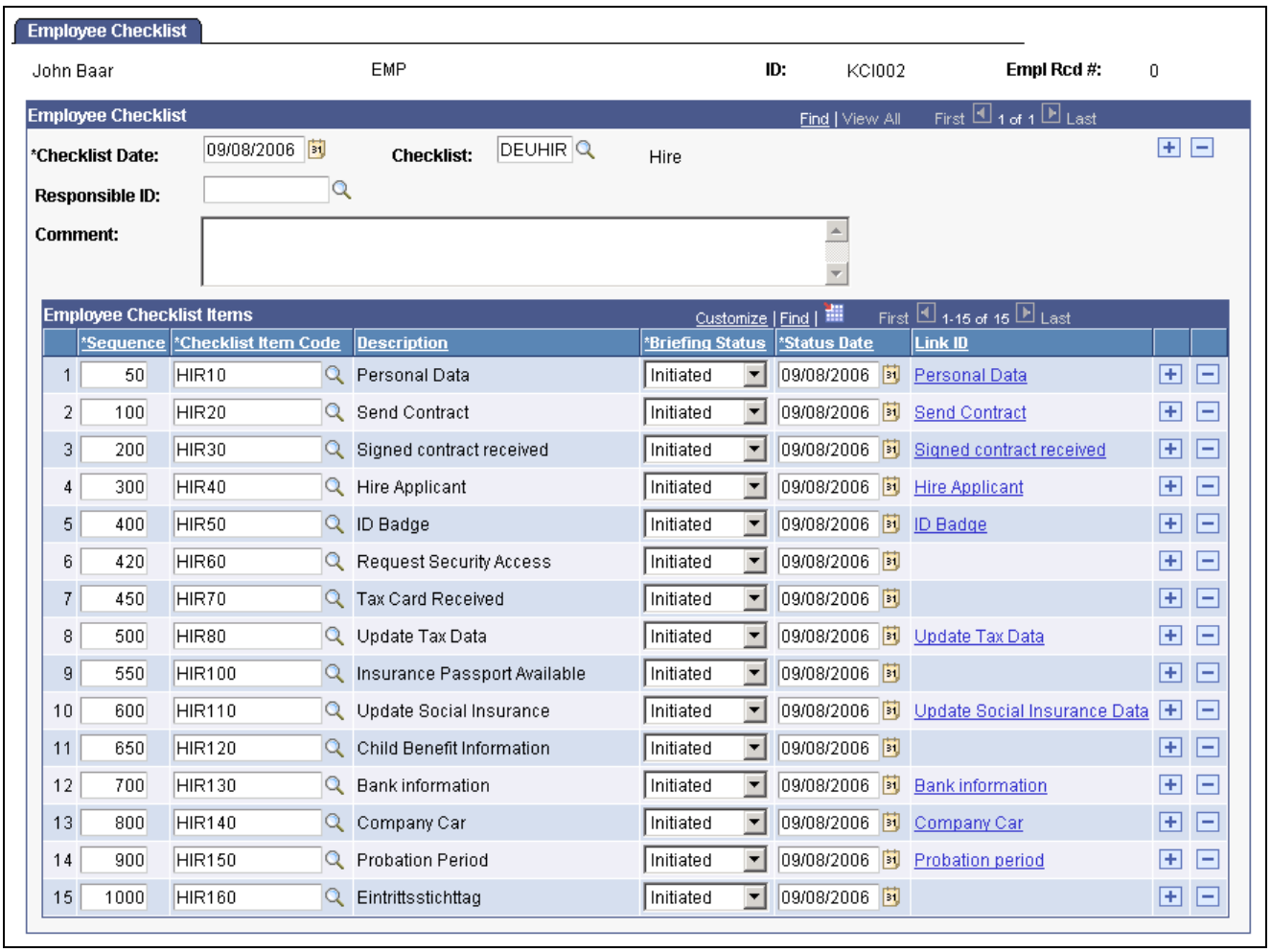
Applicant is a family member Select this check box if this person is a family member of the referral source.

Previous Employed by Company Select this check box if this person was previously employed by the company.

Copyright © 1988-2006, Oracle. All rights reserved.

Creating an Employee Checklist

Access the Employee Checklist page.



Employee Checklist page

You can have more than one checklist active for an employee at any one time.

Checklist Select the appropriate checklist. The system populates the list with the associated items.

Responsible ID Select the person who is responsible for making sure the tasks on the checklist are completed.

Employee Checklist Items

The system populates this table when you select a checklist. You can add additional items.

Checklist Item Code Displays the checklist item if you selected a checklist. To add items without a checklist, select the item.

Briefing Status The system displays a status of *Initiated* for all new checklist items. Update the status from the following options as necessary:

- *Completed*

Copyright © 1988-2006, Oracle. All rights reserved.

- *Notified*
- *Received*

Link ID Displays a link to the component used to complete the listed item.

For example, the link ID for the item Emergency Contact is Emergency Contact, which links to the Emergency Contact component (EMERGENCY_CONTACT).

Adding Additional Assignments

This section provides an overview of the process of adding additional assignments, lists prerequisites, and discusses how to:

- Work with multiple benefit record numbers.
- Enter additional assignments.

Understanding the Process of Adding Additional Jobs

PeopleSoft Enterprise Human Resources enables you to keep complete job information about workers who hold more than one job at a time in an organization .

If you set up PeopleSoft Enterprise HRMS security to allow workers to have multiple jobs, you can add an additional assignment to a worker's employment record. Use the Assign Additional Assignment component (ADD_PER_ORG_ASGN) in Administer Workforce to add new jobs for workers who already have one or more jobs. From the Add New Assignment page (PER_ORG_INST_ASGN), access the Concurrent Job Data component (JOB_DATA_CONCUR) to enter data for the new job. The component consists of the same pages as the Job Data component. If all jobs are within the same company and meet certain criteria, you can combine earnings from multiple jobs on one paycheck if you are using PeopleSoft Enterprise Payroll for North America.

Note. (USF) Use the Concurrent Hire USF component (EE_CONC_HIRE) instead of the Assign Additional Job component.

Do not use the Assign Additional Assignment component for adding temporary assignments where the substantive job must be suspended for the duration of the temporary assignment. Use the Job Data component instead.

Update job data for concurrent jobs on the Job Data component.

See Chapter 6, "Increasing the Workforce," Adding Organizational Instances for Employees, Contingent Workers, and POIs, page 146.

See Also

Chapter 4, "Understanding Organizational Relationships, Employment Record Numbers, and Multiple Jobs," page 87

Chapter 8, "Entering Additional Data in Human Resources Records," Entering Temporary Assignments, page 295

 Copyright © 1988-2006, Oracle. All rights reserved.

Working with Multiple Benefit Record Numbers

In addition to an employment record number, you assign each concurrent job a benefit record number that tracks the worker's participation in benefit programs. Jobs that share the same benefit record number also share the same benefit programs.

The following tables show different ways to assign benefit record numbers in a situation where a worker has three concurrent jobs:

Apply Job 1's Benefits to All Jobs

Job	Employment Record Number	Benefit Record Number
Job 1	0	0
Job 2	1	0
Job 3	2	0

Apply Job 3's Benefits to All Jobs

Job	Employment Record Number	Benefit Record Number
Job 1	0	0
Job 2	1	0
Job 3	2	0

Apply Separate Benefits to Each Job

Job	Employment Record Number	Benefit Record Number
Job 1	0	0
Job 2	1	1
Job 3	2	2

Apply Job 1's Benefits to Jobs 1 and 2 and Separate Benefits to Job 3

Copyright © 1988-2006, Oracle. All rights reserved.

Job	Employment Record Number	Benefit Record Number
Job 1	0	0
Job 2	1	0
Job 3	2	2

When you add a concurrent job, the system sets the default benefit record number on the Benefit Program Participation page to *0.* If you change the benefit record number, the system clears and repopulates the Benefit Program field with the data attached to the benefit record number that you enter. If the benefit record number that you enter doesn't match any existing benefit record number for the worker, the system populates the Effective Date field with the worker's hire date and the Benefits Program field with the default benefit program for the worker's pay group.

Note. Use the Benefit Program Participation page to maintain benefits program information.

Prerequisites

Before you can add multiple jobs for the workforce, you must update the user security so that users have access to the menu options that they need.

When a worker has more than one job, you might want to designate one job as primary and the others as secondary. The primary job designation is used for government reporting.

Pages Used to Add Concurrent Jobs

Page Name	Object Name	Navigation	Usage
Add New Assignment	PER_ORG_INST_ASGN	Workforce Administration, Job Information, Add Additional Assignment	Review a worker's assignments and access the Concurrent Job Data component to create new assignments.
Work Location	JOB_DATA1	Workforce Administration, Job Information, Add Additional Assignment Click the Create Assignment button.	Enter position and location information for a person's concurrent job, including the regulatory region, company, department, and location.
Job Information	JOB_DATA_JOBCODE	Workforce Administration, Job Information, Add Additional Assignment Click the Create Assignment button.	Enter information about a person's concurrent job, including status, employee class, shift, or standard hours.

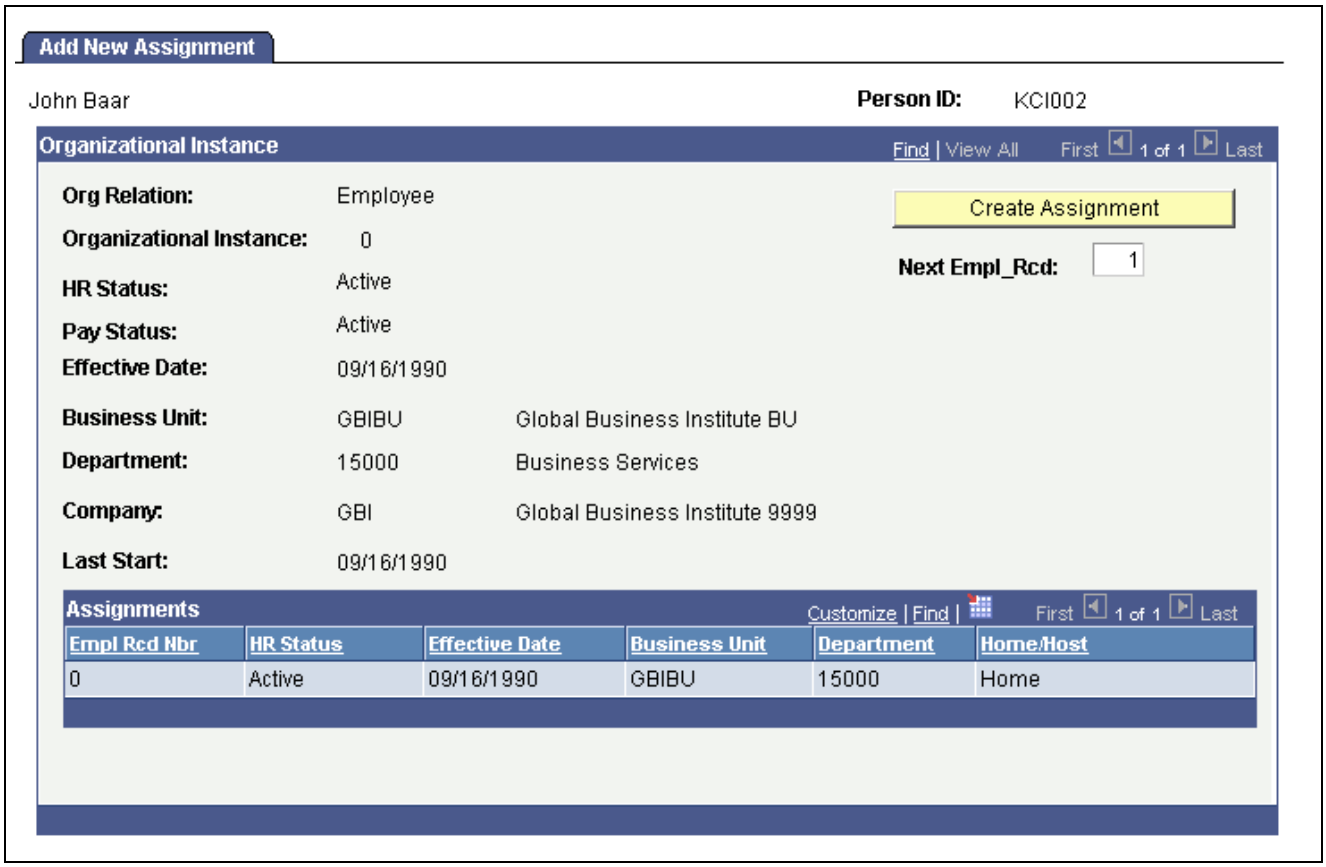
Copyright © 1988-2006, Oracle. All rights reserved.

Page Name	Object Name	Navigation	Usage
Job Labor	JOB_LABOR	Workforce Administration, Job Information, Add Additional Assignment Click the Create Assignment button.	Enter National Labor agreement data if the employee or contingent worker belongs to a National Labor agreement.
Payroll	JOB_DATA2	Workforce Administration, Job Information, Add Additional Assignment Click the Create Assignment button.	Enter payroll processing data. The payroll system and pay group information that you enter here affects component compensation processing on the Compensation page.
Salary Plan	JOB_DATA_SALPLAN	Workforce Administration, Job Information, Add Additional Assignment Click the Create Assignment button.	Enter information about a person's salary plan.
Compensation	JOB_DATA3	Workforce Administration, Job Information, Add Additional Assignment Click the Create Assignment button.	Enter compensation information.
Employment Information	EMPLOYMENT_DTA1	Workforce Administration, Job Information, Add Additional Assignment Click the Create Assignment button.	Enter optional data, such as an employee's business title.
Job Earnings Distribution	JOB_DATA_ERNDIST	Workforce Administration, Job Information, Add Additional Assignment Click the Create Assignment button.	Distribute a person's compensation for one job among different departments, job codes, accounts, shifts, position numbers, or general ledger pay types. If the person's pay is regularly charged to more than one cost center, designate how much to allocate to each cost center.
Benefit Program Participation	JOB_DATA_BENPRG	Workforce Administration, Job Information, Add Additional Assignment Click the Create Assignment button.	Specify the benefit program in which a person is enrolled for benefits in PeopleSoft Enterprise Human Resources or PeopleSoft Enterprise Benefits Administration.

Entering Additional Assignments

Access the Add New Assignment page.

Copyright © 1988-2006, Oracle. All rights reserved.



Add New Assignment page

Create Assignment Click to access the Job Data record to enter specific information about the new assignment.

Org Relation (organizational relationship) Displays the person's organizational relationship.

Organizational Instance Displays the instance number for this relationship.

Next Empl_Rec (next employee record) Enter the employment record number for the next assignment. This number should be unique from all other employment record numbers currently held by this person.

Assignments Lists the assignments under this organizational instance by employment record number.

Adding Job Applicants

To add applicants, use the Manage Hires (HR_MANAGE_HIRES) component.

The Add Employment Instance and Add Contingent Worker components are the most common components that you use to increase your workforce, but they are not the only components. You can also use the Manage Hires component, which is designed especially for hiring applicants. The Manage Hire page displays a list of applicants that have gone through the recruiting process and are ready to be hired. When you add the applicant, much of the applicant's information is transferred to the Personal Data page.

 Copyright © 1988-2006, Oracle. All rights reserved.

Selecting an applicant name on the Manage Hires page opens the Manage Hire Details page.

Note. The Manage Hires component is also used with the Template-Based Hires process.

See Also

Chapter 6, "Increasing the Workforce," Increasing the Workforce Through Templates and Job Applicants, page 208

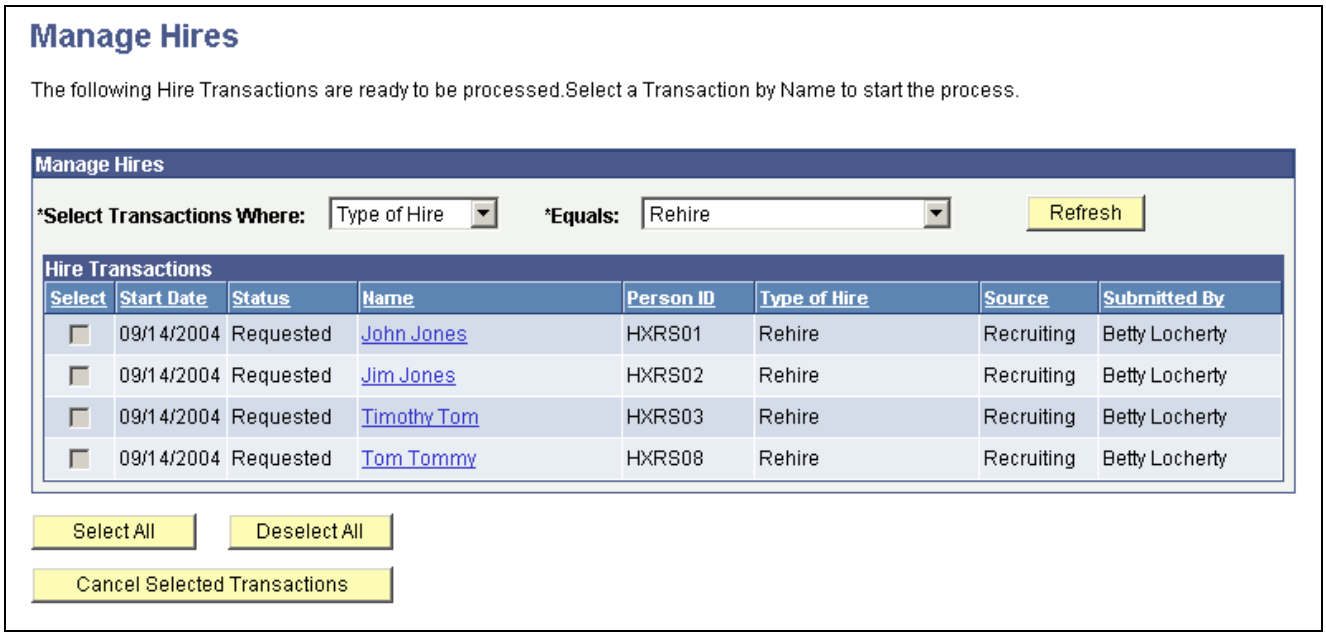
Pages Used to Add Job Applicants

Page Name	Object Name	Navigation	Usage
Manage Hires	HR_MANAGE_HIRES	Workforce Administration, Personal Information, Manage Hires, Manage Hires	For PeopleSoft Recruiting Solutions, it displays a list of applicants that have gone through the recruiting process. When processing people using the template-based hires, it displays a list of persons who have gone through the template hire process.
Manage Hires Detail	HR_MNGHIRE_DET	Workforce Administration, Personal Information, Manage Hires, Manage Hires Detail Click the Names link on the Manage Hires page.	View detailed data for job applicants or template-based hires.

Managing Hires

Access the Manage Hires page.

Copyright © 1988-2006, Oracle. All rights reserved.



Manage Hires page

Select Transactions Where: Select the value that represents how you want the search to produce results.

Valid values are: *Source*, *Start Date*, *Status*, and *Type of Hire*.

Equals: This field is visable if the Select Transaction Where: field selected is *Source*, *Status*, or *Type of Hire*.

When the Select Transaction Where: is *Source* the valid values for Equals are *Template–Based Hire* and *Recruiting Solutions*.

When the Select Transaction Where: is *Status* the valid values for Equals are *Action Required, All*, *Draft*, *Error*, and *Requested*.

When the Select Transaction Where: is *Type of Hire* the valid values for Equals are *Add Concurrent Job*, *Add Contingent Worker*, *Hire*, *Rehire*, and *Transfer*.

From: and **To:** This field is visable if the Select Transaction Where: field selected is *Start Date*.

Enter the range of desired dates to retrieve a list of applicants to hire or a list of people in the template-based hire process.

Refresh Click to update the list of applicants or hires in the Hire Transactions region when you change the value of the Select Transaction Where field and/or the Equals field.

Name Select a person's name to review job details and pull this person's personal data information from PeopleSoft Enterprise Recruiting Solutions or the template–based hire process.

When you select the name, the Manage Hires Detail page appeares, on which you can view the person's personal data information.

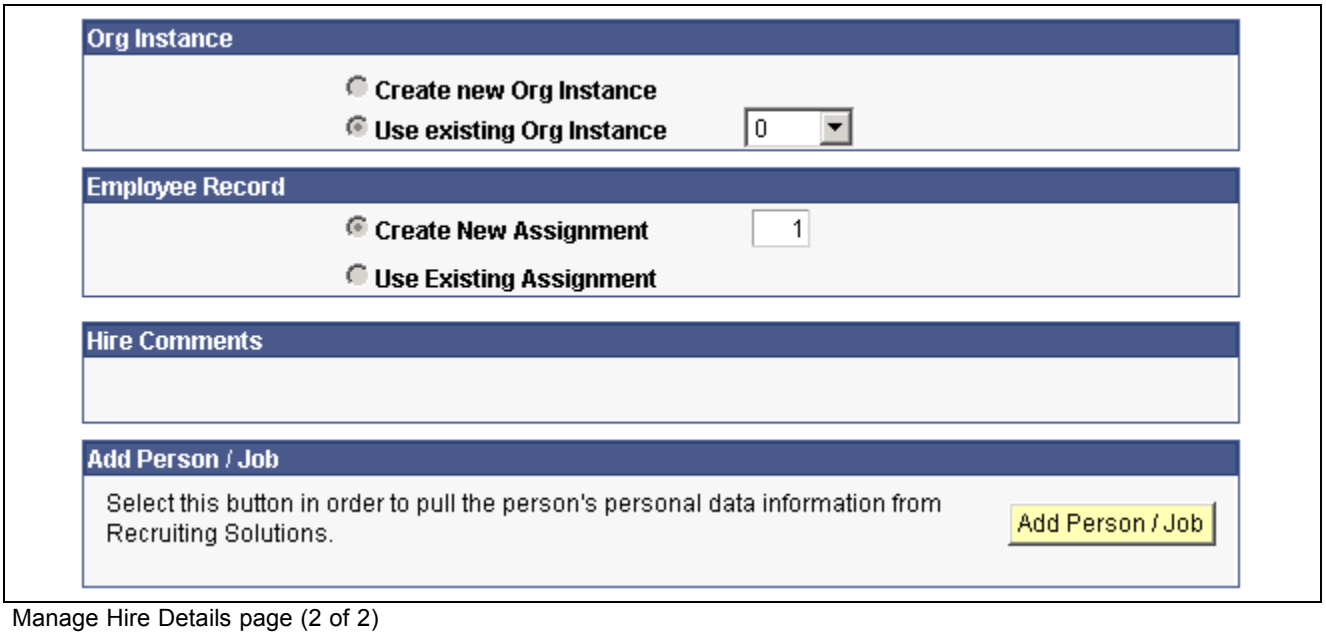
Reviewing Hire Details

Access the Manage Hire Details page.

Copyright © 1988-2006, Oracle. All rights reserved.



Manage Hire Details page (1 of 2)



Manage Hire Details page (2 of 2)

View details and add the person to the database.

Copyright © 1988-2006, Oracle. All rights reserved.

Add Person / Job Click the button to access the Data Contol page and add the person to the database.

Reviewing Organizational Relationships

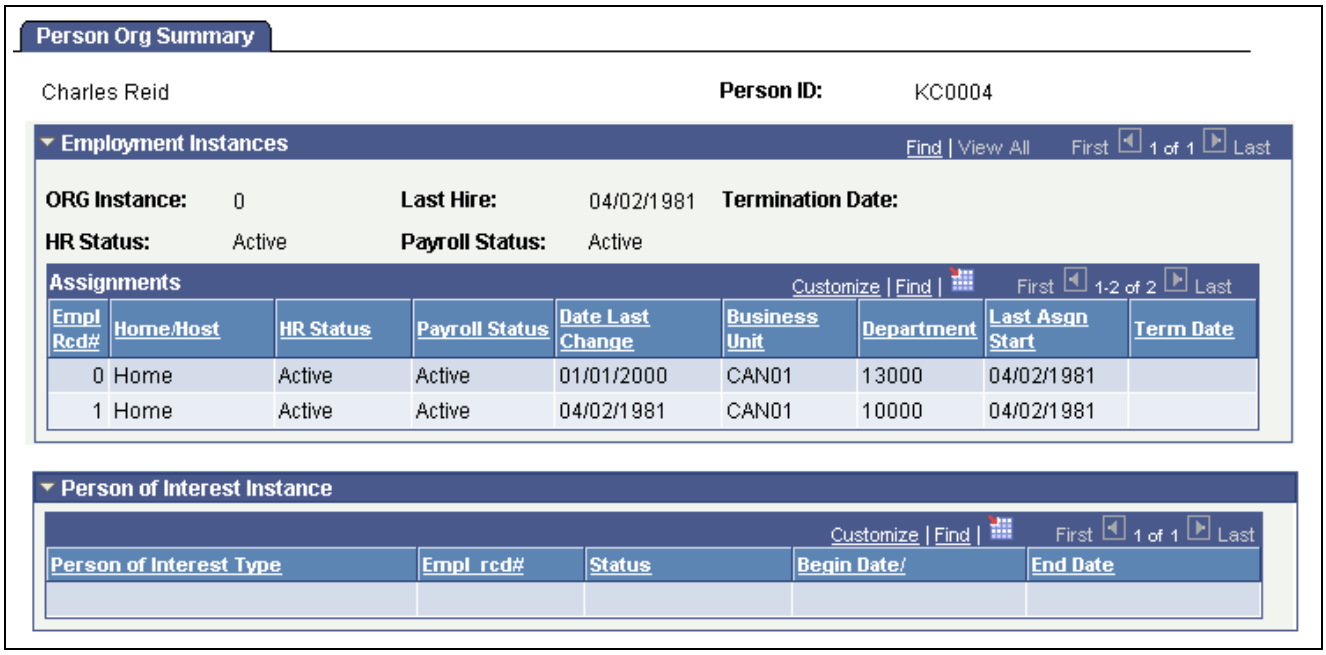
This section discusses how to view a person's organizational relationships.

Page Used to View a Person's Organizational Relationships

Page Name	Object Name	Navigation	Usage
Person Org Summary	PERSON_SUMMARY	Workforce Administration, Personal Information, Person Organizational Summary, Person Org Summary	Review a summary of a person's organizational relationships.

Viewing a Person's Organizational Relationships

Access the Person Org Summary page.



Person Org Summary page

Increasing the Workforce Through Templates and Job Applicants

This section provides an overview of template based hires and discusses how to:

- Add a template-based hire.

Copyright © 1988-2006, Oracle. All rights reserved.

- View the status of a template based hire.
- Manage hires.
- Review hire detail.

Understanding Template-Based Hires

Template-based hires allows you to expedite the hiring process. It offers a way to streamline the repetitive data entry process by reducing the current data entry process through the Personal Data and Job Data pages.

There are three types of users that will facilitate template-based hires. The template administrator creates various templates for use by the end-users. The end-user enters data for persons being added to the database. The amount of data an end-user enters is dependant on the types of templates created. Security limits determine which templates that the end-user can access. The human resources administrator (HR administrator) will determine at the template level whether the end-user's data will automatically update the HR system, or requires an HR administrator to review it first. Also, the HR administrator will be sent and errors that occur when the end-user saves a persons data to the database for completion. This table summarizes the pages used by each type of user:

Template Administrator	End-User	HR Administrator
Template Record/Field	Template Based Hire: • Enter Hire Details • Enter Employee Information • Person Match Found • Select an Action • Confirmation	Manage Hires: • Manage Hire Details • Error Transaction
Template Section		Manage Hires Detail
Template Creation: • Configuration • Sections • Person Rules • Error Transaction		Error Transaction
Copy Template	Template Hire Status	
Template Category Table		

Note. This chapter focuses on the records the end-user and HR administrator use in the template-based hire process. Template set up by the template administrator is discussed in another chapter.

See Chapter 2, "Setting Up the Administer Workforce Business Process," Setting Up Template-Based Hire Templates, page 14.

To start the template based hire process, select a pre-configured template. This template will display a simple data entry page. The fields on this page will be defaulted or hidden, based on how the template was set up by the template administrator. Once the hire data is entered it can be either saved directly to the HR system, reviewed by an human resources administrator, or saved for later.

Copyright © 1988-2006, Oracle. All rights reserved.

When templates are created by the template administrator, the Template Status is set to Test (T). Once the template is tested and ready for use the status will need to be changed to Active (A). When you are searching for templates to use in the template-hire process the only templates that are available are those with a status of Active (A). End-users will only be able to see templates they have row-level security access to.

When the data is submitted for processing the appropriate service oriented architecture (SOA) or component interface (CI) will be called to process the actual hire. If an error occurs during the processing a line item will be added to the Manage Hires component and a human resource administrator is able to review the data, make corrections, resubmit for processing, or cancel the hire. The human resource administrator will be taken into the Personal Data and/or the Job Data hire components to complete the hiring process and can modify the data entered by the end-user as needed. The components will be pre-populated with the data entered through the template.

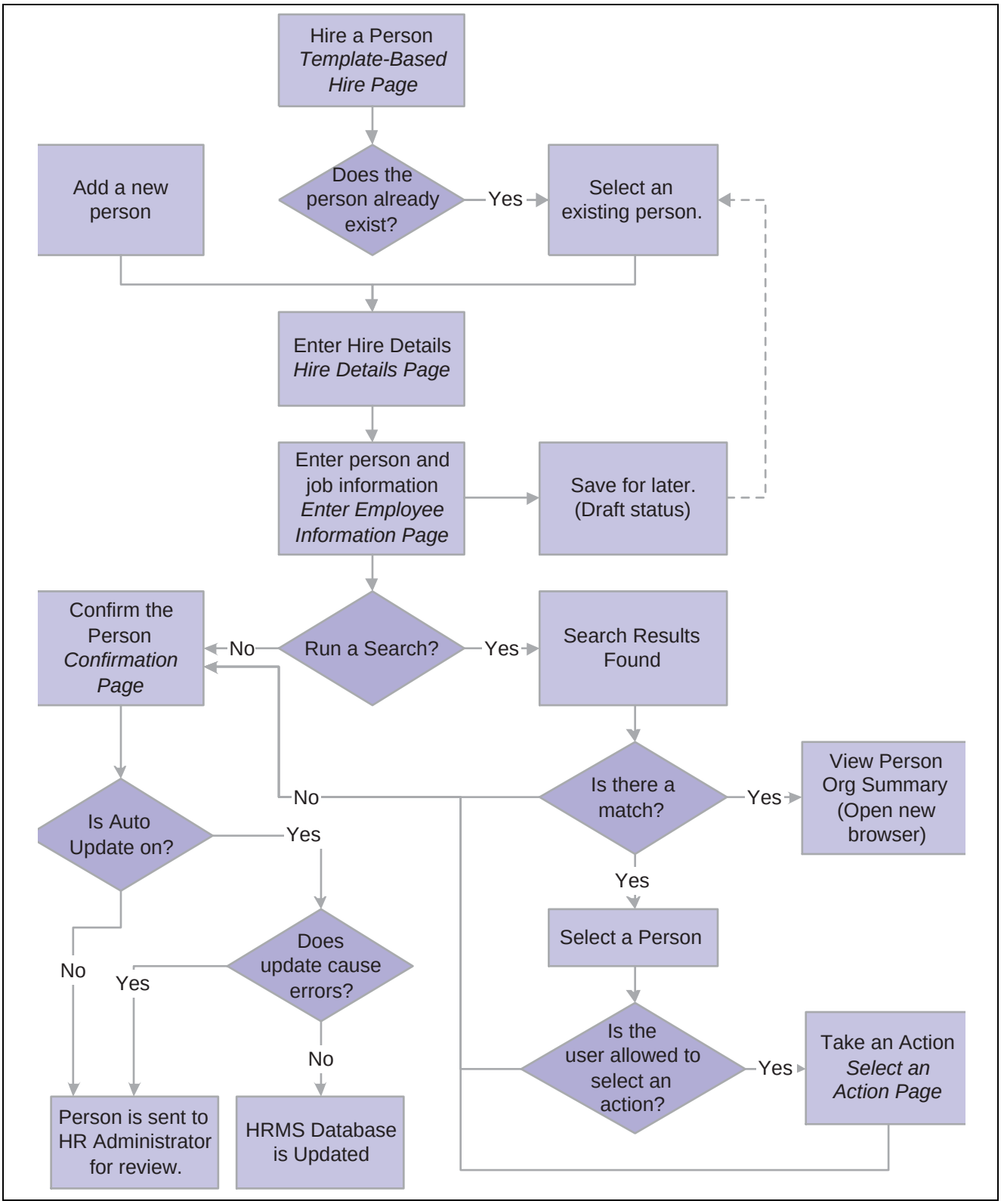
Template-Based Hire Process Flow

When hiring a person using the template-based hire feature you will use the following pages:

- Template-Based Hire.
- Enter Hire Details.
- Enter Employee Information.
- Person Match Found.
- Select an Action.
- Confirmation.
- Template-Based Hire Status.

This diagram illustrates the template-based hire process:

 Copyright © 1988-2006, Oracle. All rights reserved.



Template-Based Hire Process Flow

Copyright © 1988-2006, Oracle. All rights reserved.

Template-Based Hire

The Draft Hires to Process grid on the Template-Based Hire page displays the people who are in draft status within the hire process. The list of people is filtered based on the operator ID of the person accessing the page. The page will only show the entries in which the end-user has previously entered using their Operator ID.. On this page you can delete a person which will delete the persons information.

Enter Hire Details

On the Enter Hire Details page enter basic information for the template. On this page you will enter the:

- Template name (view only).
- Organizational Relationship (view only).
- Country (view only).
- Category Code (view only).
- Person ID.
- Job effective date.
- Hire action.
- Action reason.
- Name and address formats.

Note. Depending on how the template administrator has set up the template configuration this information will be display only, visible and editable, or hidden.

Also, for informational purposes, this page will display such information as the:

- Template name.
- Country.
- Organizational relationship, which is the type of person being hired, such as employee or contingent worker.
- Category of template.

Enter Employee Information

The Enter Employee Information page is where you will enter name details, home and mailing address details, National ID, and job details. The number of sections and fields on this page are dependent on how the template chosen has been configured by the template administrator.

Person Match Found

The Person Match Found page displays the possible person matches. The match parameters are set up by the template administrator. If a match is found, select the person from the list and the EmplID is carried forward in the hire process. If no match is found, this page will not display an EmplID but you can continue with the hire process by clicking the *Not a Match – Continue with Hire* button.

Select an Action

The Select an Action page displays only if a match is found during the search and you are allowed to take some action (defined at the template level). If the user is not allowed to take any action, the page will not display and a Hire Request for the person is sent to the HR administrator.

 Copyright © 1988-2006, Oracle. All rights reserved.

Confirmation

The Confirmation page displays if the user has successfully saved the data to the system. There are four different messages displayed on the conformation page based on the template level set up and the security access of the users Operator ID. The confirmation page will display one of the following four messages:

- Save Confirmation. This message is displayed if the user has access to save the person being hired to the database and a Person ID is generated.
- Save for Later Confirmation. This message is displayed if the person entered is saved in draft status and a Person ID is not generated.
- Submit Confirmation. This message is displayed if the user has access to enter the data but not save it to the database. The person being hired is submitted to Human Resources for final processing.
- Further Processing Required. This message is displayed the user has encountered some errors. The person hire information is then sent to human resources to complete the hire process.

Once the data has been confirmed it is stored in staging tables. The tables HR_TBH_HDR and HR_TBH_DATA are used as staging tables to save the entered information until the hire process completes. The HR_TBH_HDR table stores the high-level information, which includes a unique sequence number representing the transaction ID, the template ID, the Operator ID of the user who entered the data, the status representing various stages of the hire process, and the transaction date. The HR_TBH_DATA table stores the record name, field name, and value of the Record/Field with the unique transaction ID. This table is a child of the HR_TBH_HDR table.

The status field on the HR_TBH_HDR may have one of the values displayed in the table below:

Status	Definition	Scenario
DFRT	Draft	The user has begun to enter data but saved to continue later.
SBMT	Submitted	The user entered all required data based on the template configuration.
ACTR	Action Required	The user decided to send the hire request to the HR administrator to review or complete the rest of the information.
EROR	Error	The user encountered some error while saving the data in to the system.
HIRE	Hired/Added	Once the HR administrator completes the hire process by adding person and job information into the system, the status of the row will change to “Hire/Added”.
COMP	Completed	Once the row is deleted by the user, the status of the row will change to “Completed” and the row will not appear on the Hire List page.

Error Transaction

The Error Transaction page is displayed when the template administrator is testing the template and the test is unsuccessful. This page is also available to the HR Administrator on the Manage Hires Detail page. This page will display the template used, the person causing the error, the transaction ID, and the start date. It will also give a description of the error found.

Copyright © 1988-2006, Oracle. All rights reserved.

Template Hire Status

The Template Hire Status page displays the persons being processed by the template based hire process. It will display the status of each person. The list is filtered based on the Operator ID of the user. Also, the user has the option of deleting a row.

Note. This page does not show people in draft status. You can only view who is currently being processed by the HR department, view who has been cancelled by the HR department, and who has successfully been hired and see their Person ID. They have the option to remove people from the Cancelled Hires and Processed Hires grids.

Prerequisite

Template-based hires provide a configurable, template driven approach, where you can define default data for various sections in the hiring process. You will be able to create templates to meet different user needs by determining to hide or display specific fields. This allows your Human Resources department to decentralize the hiring process out to line managers or human resource representatives in the field.

Prior to hiring persons with templates, a template administrator must set up the templates. The administrator must be a person who is very familiar with the hiring process. When creating a template, the administrator is responsible for determining:

- Logical groups of fields, which will be the sections to include on the template.
- The sequence of sections and fields within sections.
- Default values for fields.
- Which fields will be hidden, display-only, or enterable.
- Whether data entered by the end-user can be directly submitted for processing or will need to be reviewed by and human resource administrator.

Sections and fields used within templates are delivered as system data. These delivered sections can be modified within your templates to suit your organizations needs for hiring. These sections are located in the Template Section component (Set Up HRMS, Product Related, Workforce Administration, Template-Based Hires, Template Section).

The following table lists the delivered Personal Data sections used for template creation:

Section Number	Section Name	Countries with Country Specific Sections
10	Name	BEL, BRA, CHE, CHN, DEU, ENG, ESP, FRA, HKG, ITA, JPN, MEX, and NLD
30	Birth Information	
40	Data Protection	
50	Gender	
60	Education	
70	Marital Status	
80	Language	

 Copyright © 1988-2006, Oracle. All rights reserved.

Section Number	Section Name	Countries with Country Specific Sections
85	Student Status	
90	Alternate ID	
100	National ID	AUS, BEL, BRA, CAN, CHE, DEU, ESP, FRA, GBR, HKG, IND, IRL, ITA, JPN, MEX, MYS, NLD, SGP, and USA
120 – 121	Address	AUS, BEL, BRA, CAN, CHE, DEU, ESP, FRA, GBR, HKG, IND, ITA, JPN, MEX, MYS, NLD, NZL, SGP, and USA
130 – 133	Personal Phone	
135	E-mail Address	
320	Diversity	CAN, GBR, IND, and USA
200	Smoking	CAN, JPN, and USA
210	Registro Geral	BRA
211	CTPS – Carteira de Trabalho e Previdencia Social	BRA
212	Voter Registration	BRA
213	Military Registration	BRA
214	PIS/PASEP	BRA
220	Diversity	CAN
221	Health Care	CAN
230	Guardianship	CHE
231	Place of Origin	CHE
240	HR Responsibility	DEU
241	Military Status	DEU
242	Nationality	DEU
250	Spain	ESP
260	France	FRA
270	Diversity	GBR
280	Diversity	IND

Copyright © 1988-2006, Oracle. All rights reserved.

Section Number	Section Name	Countries with Country Specific Sections
290	Military Status	ITA
300	Honseki Prefecture	JPN
310	Mexico	MEX
320	Diversity	USA
330	United States	USA

The following table lists the delivered Job Data sections used for template creation:

Section Number	Section Name	Countries with Country Specific Sections
400	Work Location – Job Indicator	
410	Work Location – Position Data	
420	Work Location – Expected Job End Date	
430	Work Location – Job Fields	
431	Work Location – Spain	ESP
432	Work Location – Japan	JPN
435	Work Location – Military	
440	Job Information – Job Code	
450	Job Information – Reporting Information	
460	Job Information – Status	
470	Job Information – Employee Classification	
480	Job Information – Shifts	
490	Job Information – Standard Hours	
500	Job Information – Contract	
505	Job Information – Military	
510	Job Information	AUS, BEL, BRA, DEU, ESP, FRA, GBR, ITA, MEX, MYS, NLD, and USA

Copyright © 1988-2006, Oracle. All rights reserved.

Section Number	Section Name	Countries with Country Specific Sections
511	Job Information – Australian Higher Education	AUS
520	Job Labor – Bargaining Unit and Labor Agreement	
530	Job Labor – Employee Categories	
540	Job Labor – Union Code	
550	Job Labor – Exemptions	
560	Job Labor	DEU, ESP, FRA, ITA, and IND
570	Payroll – Payroll System	
580	Payroll – Absence System	
590	Payroll – Payroll Information	
610	Payroll – Balance Group Number	AUS, HKG, MYS, NZL, and SGP
620	Salary Plan	
625	Salary Plan – Military	
630	Compensation – Payroll Currency and Frequency	
640	Compensation – Auto Calc Premium	
650	Compensation – Pay Components	
660	Employment Information – Original Start Date	
670	Employment Information – Organizational Assignment Data	
675	Employment Information – Military	
680	Employment Information – Additional Data	
690	Employment Information	BEL, BRA, CAN, JPN, NLD, and USA
690	Festive Advance	MYS and SGP
691	Employment Information — E & G	CAN and USA
700	Benefit Program – Benefit Record Number	

Copyright © 1988-2006, Oracle. All rights reserved.

Section Number	Section Name	Countries with Country Specific Sections
710	Benefit Program – Benefit Status	
720	Benefit Program – Ben Admin Eligibility	
730	Benefit Program – Participation	
740	Time Reporter Status	
750	Time Reporter Type	
760	Time Reporter IDs	
770	Time Reporter Type – Rule Elements	

The following table lists the delivered Federal sections used for template creation:

Section Number	Section Name	Industry Specific Sections
10	Data Control Dates & Action	FED
20	Data Control Codes	FED
30	Data Control PAR Request	FED
40	Data Control PAR Remarks	FED
41	Data Control PAR Remarks	FED
42	Data Control PAR Remarks	FED
43	Data Control PAR Remarks	FED
44	Data Control PAR Remarks	FED
50	Tracking Data	FED
60	Name	FED
70	Gender and Other Personal Data	FED
80	Citizenship Status	FED
90	National ID	FED
100	Additional Birth Information	FED
110	Home Address	FED
111	Mailing Address	FED

Copyright © 1988-2006, Oracle. All rights reserved.

Section Number	Section Name	Industry Specific Sections
121	Personal Phone Number 01	FED
122	Personal Phone Number 02	FED
123	Personal Phone Number 03	FED
124	Personal Phone Number 04	FED
130	Veterans Information	FED
140	Marital Information	FED
150	Education Details	FED
160	Position Number	FED
170	Job Data	FED
180	Position Data	FED
190	Compensation	FED
200	Compensation - Quoted Pay	FED
210	Other Pay Information	FED
220	Accounting Information	FED
230	Dates	FED
240	Expiration Dates	FED
250	Appointment Data	FED
260	Service Computation Dates	FED
270	Service Conversion Dates	FED
280	Within-Grade Increase Data	FED
290	Union Data	FED
300	Permanent Data RIF	FED
310	Probation Dates	FED
320	Retained Grade Expires	FED
330	Non-Pay Data	FED
340	Security Information	FED
350	Benefits System	FED

Copyright © 1988-2006, Oracle. All rights reserved.

Section Number	Section Name	Industry Specific Sections
360	Benefits Control	FED
370	Benefits Administration Eligibility	FED
380	FEHB Eligibility	FED
390	FEHB Date	FED
400	NFC Benefits Coverage	FED
410	FEGLI Data	FED
420	Retirement Data	FED
430	FICA Status	FED
440	NFC Military Service Deposit	FED
450	Time and Labor - Reporter Status	FED
460	Time and Labor - Reporter Type	FED
470	Time and Labor - Reporter Ids	FED
480	Time and Labor - Rule Elements	FED

The labels of the fields on the template sections will mostly be the actual field labels. But the template administrator can create a text catalog entry for those fields in which they want to change the label.

Once the templates are created, the template administrator will assign a category to each template. The category is used to for row-level security of the template. This security will restrict end-user access to the template. Also, PeopleTools Permission Lists and Roles are used for security purposes.

When templates are similar, the template administrator can clone an existing template to eliminate duplicate entry.

See Chapter 2, "Setting Up the Administer Workforce Business Process," Setting Up Template-Based Hire Templates, page 14.

Pages Used to Increasing the Workforce Through Templates

Page Name	Object Name	Navigation	Usage
Template-Based Hire	HR_TBH_EULIST	Workforce Administration, Template-Based Hire, Template-Based Hire	Assign a template to a person whom you are hiring.
Enter Hire Details	HR_TBH_ADD	Workforce Administration, Template-Based Hire, Template-Based Hire Click a Name.	Enter basic information such as the persons's Job Effective date to start the template hire process for a person.

Copyright © 1988-2006, Oracle. All rights reserved.

Page Name	Object Name	Navigation	Usage
Enter Employee Information	HR_TBH_DATA	Workforce Administration, Template-Based Hire, Template-Based Hire Click a Name, then click Next.	Enter details for the person being hired. Only the fields that have been defined on the template you associated with this employee will display for data entry.
Person Match Found	HR_TBH_SRMATCH	Workforce Administration, Template-Based Hire, Template-Based Hire Click a Name, then click Next, and then click Save and Submit.	When saving and submitting the person to the database, if a match is found on the persons name or national ID this page displays and allows you to select an existing person in the database or continue with hire.
Select an Action	HR_TBH_ACTION	Workforce Administration, Template-Based Hire, Template-Based Hire Click a Name, then click Next, and then click Save and Submit.	Select an action if a matching person is found in the database.
Confirmation	HR_TBH_CONFIRM	Workforce Administration, Template-Based Hire, Template-Based Hire Click a Name, then click Next, and then click Save and Submit.	Displays the type of confirmation after saving a template-based hire.
Error Transaction	HR_TBH_ERROR	Workforce Administration, Template-Based Hire, Template-Based Hire Click a Name, then click Next, and then click Save and Submit.	Visible to HR administrators and template administrators when an error occurs during the save or during testing of the template.
Template Hire Status	HR_TBH_STATUS	Workforce Administration, Template-Based Hire, Template-Based Hire Status Workforce Administration, Template-Based Hire, Template-Based Hire Click Template-Based Hire Status.	View the people hired through templates with a pending, cancelled, or processed status.
Manage Hires	HR_MANAGE_HIRES	Workforce Administration, Personal Information, Organizational Relationships, Manage Hires	Displays a list of applicants that have gone through either the recruiting process or persons who are going through the template–based hire process.

Copyright © 1988-2006, Oracle. All rights reserved.

Page Name	Object Name	Navigation	Usage
Manage Hires Detail	HR_MNGHIRE_DET	Workforce Administration, Personal Information, Organizational Relationships, Manage Hires Click an Applicants Name.	Displays job details and pulls the person's personal data information from PeopleSoft Enterprise Recruiting Solutions or template–based hires.

Adding a Template-Based Hire

Access the Template-Based Hire page.



Template–Based Hire page

To add a person using the template-based hire process, select a template and click Go. The templates available for selection are those set up by the template administrator.

See Also

Chapter 2, "Setting Up the Administer Workforce Business Process," Setting Up Template-Based Hire Templates, page 14

Entering Hire Details

Access the Enter Hire Details page.

Copyright © 1988-2006, Oracle. All rights reserved.



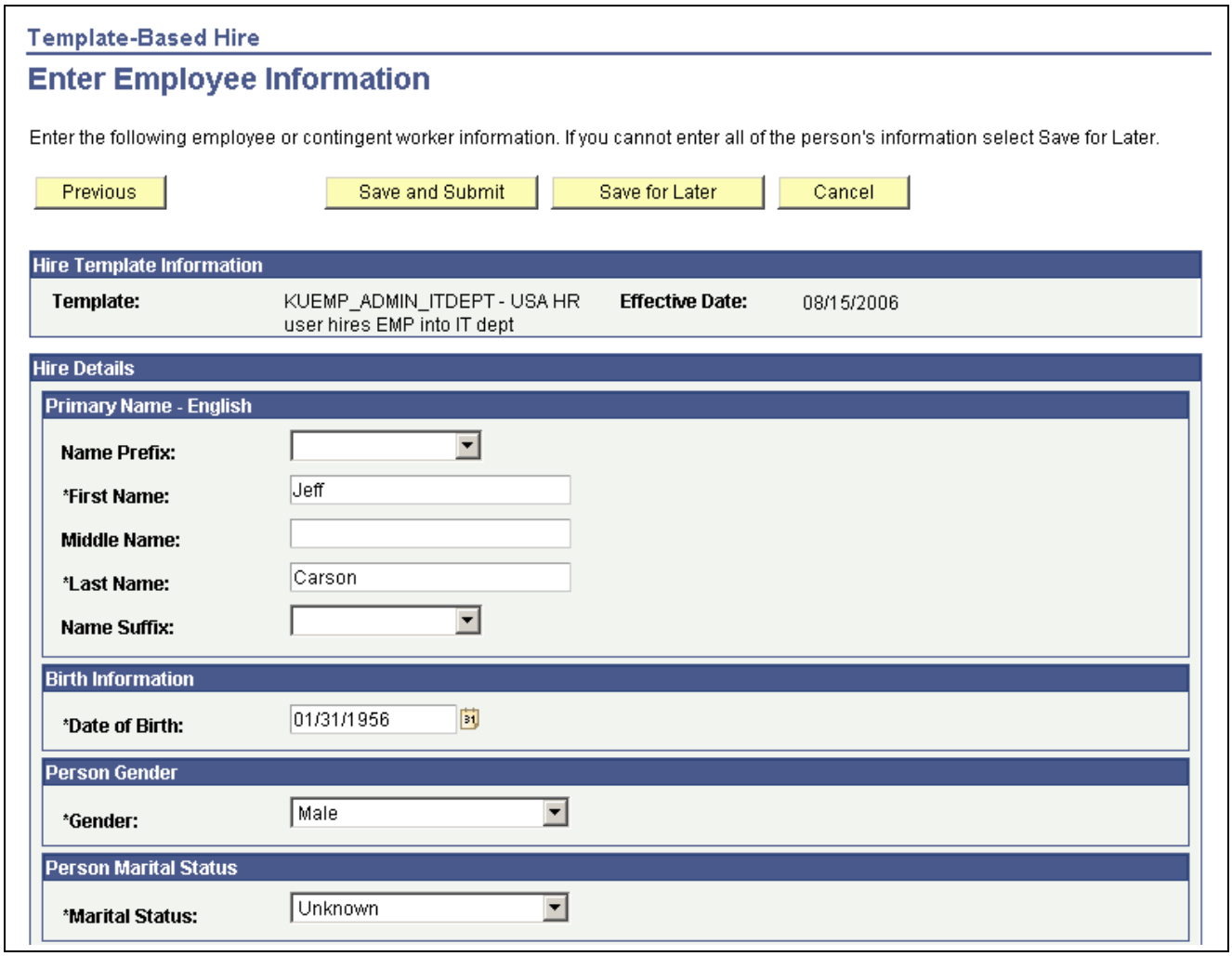
Enter Hire Details page

Enter basic hire details to start the hire process. The fields to enter vary depending on template set up. Once the values on this page are entered click next to access the Enter Employee Information page.

Entering Employee Information

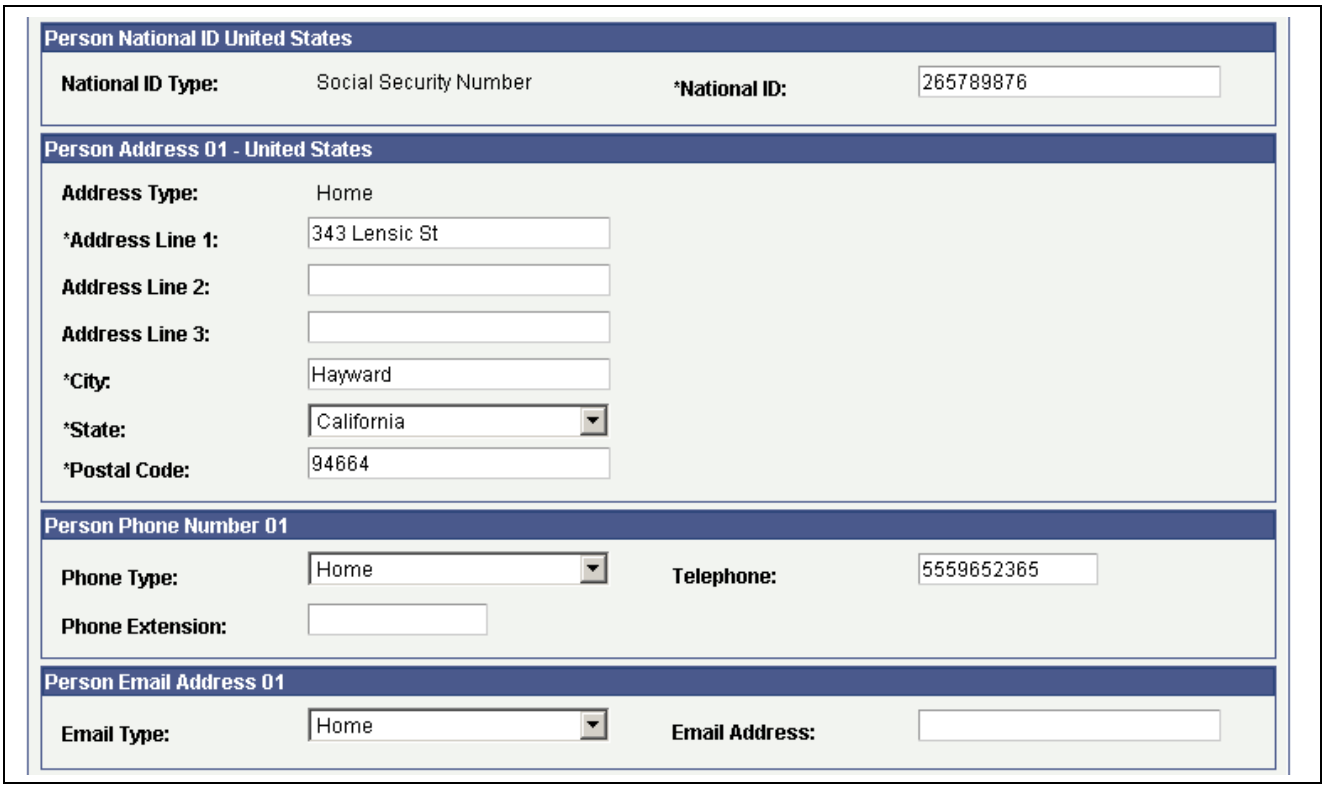
Access the Enter Employee Information page.

Copyright © 1988-2006, Oracle. All rights reserved.

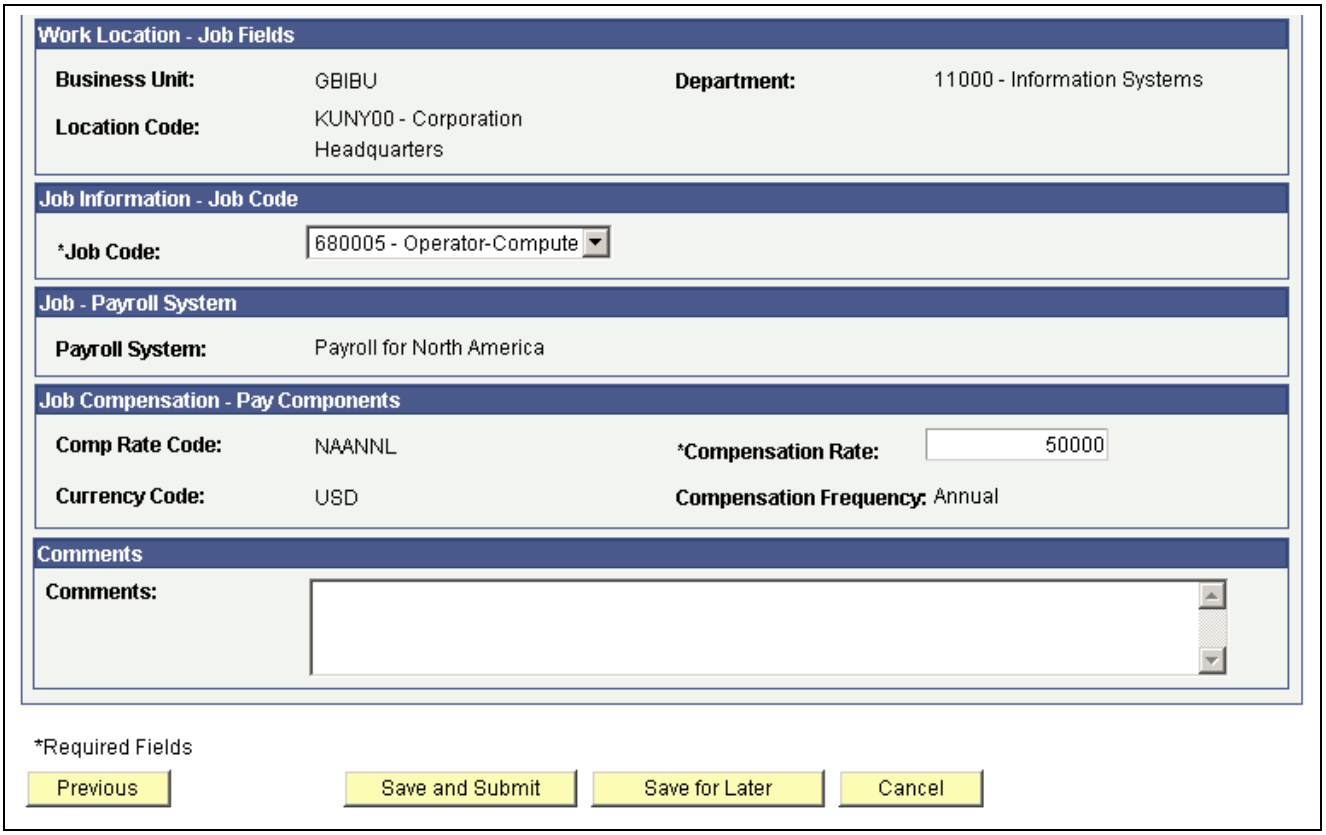


Enter Employee Information page (1 of 3)

Copyright © 1988-2006, Oracle. All rights reserved.



Enter Employee Information page (2 of 3)



Enter Employee Information page (3 of 3)

Copyright © 1988-2006, Oracle. All rights reserved.

Enter employee information for the fields that are defined for the template chosen. This data will be used to hire the person. Once all data is entered you are able to:

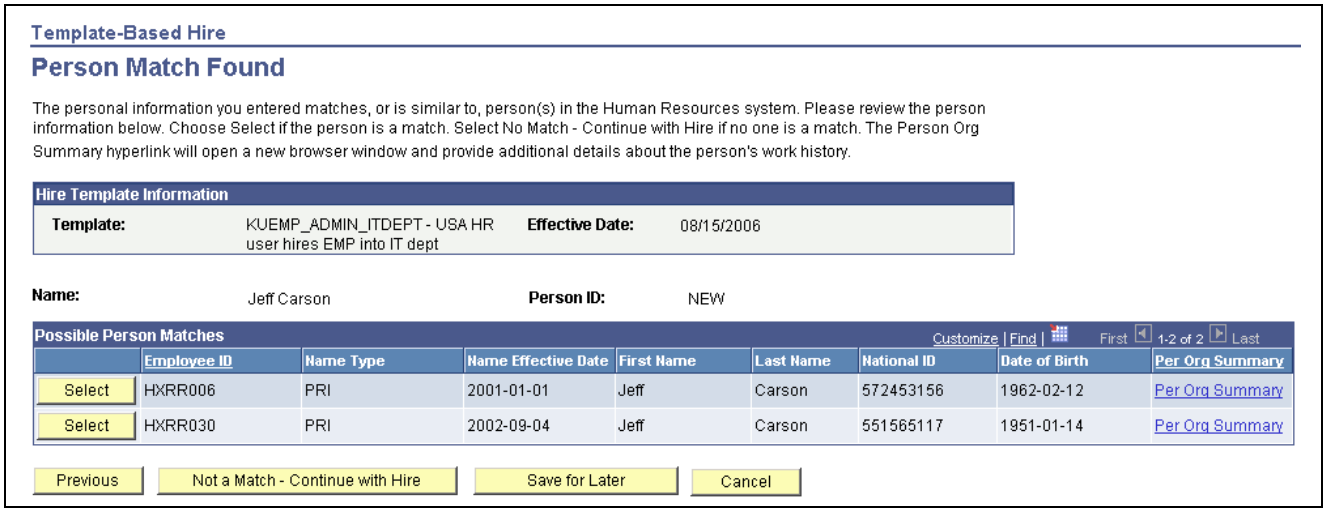
- Save and Submit – Select to save and submit the information for the person to the database. The person will be hired in the database and all information entered is updated in the appropriate tables.
- Save for Later – Select to place the hire in draft status. Depending on the security access granted the end-user, they can access the person later to complete the hire or the hire will be completed by the HR representative.
- Submit to HR – Select to submit the persons' information to HR for review, completion, or submission by the HR administrator.

Note. The save options will vary depending on the template setup and the end-users security access. For example, if the end-user is not allowed to save and submit data to the database, the template administrator will set up the template so all hires will have to be saved for later or submitted to HR for completion.

See Chapter 6, "Increasing the Workforce," Understanding Job Data, page 133.

Completing the Hire when a Person Match is Found

Access the Person Match Found page.



Person Match Found page

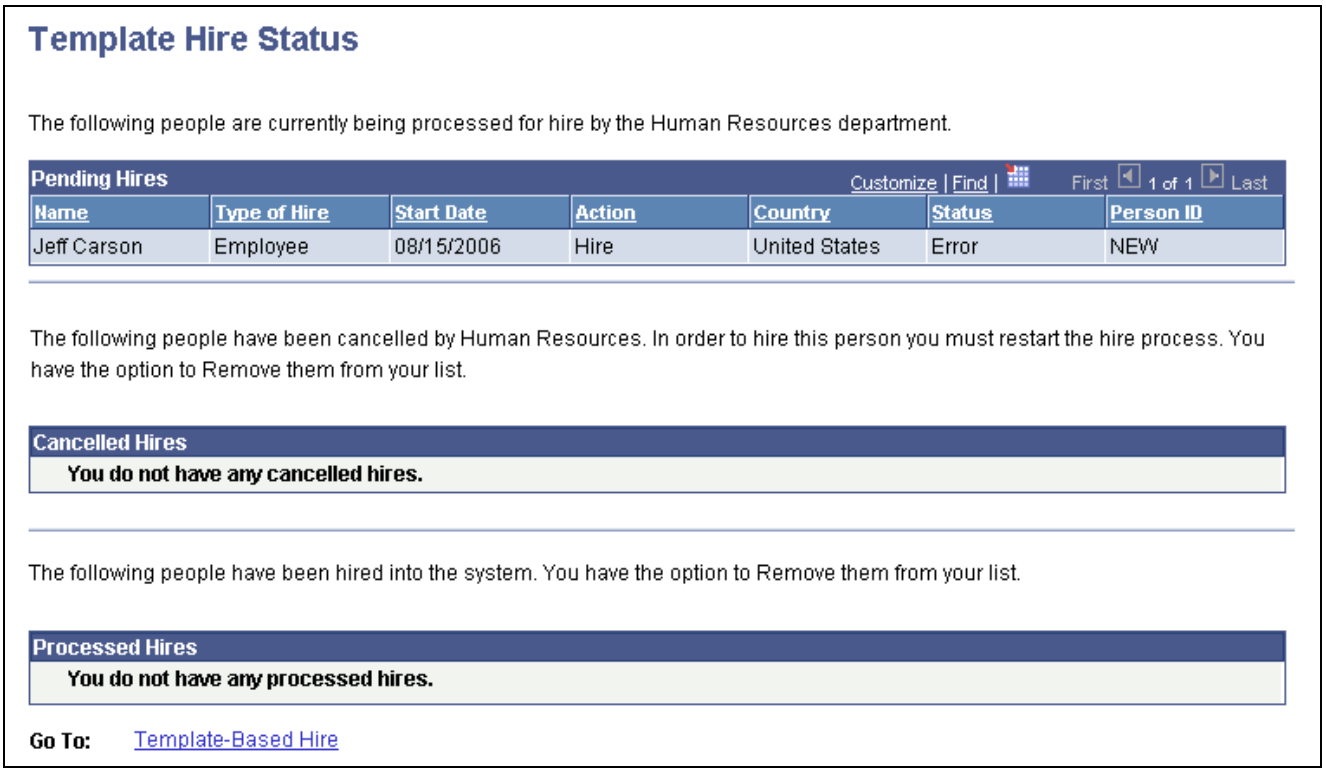
This page is displayed only if a match is found on the person being hired. If a match is found, the end-user can select one of the existing Employee ID's or continue with the hire. The end-user can review the persons Personal Organizational Summary for all existing persons in the database. This can aide them on deciding if the person is a new hire or should be a concurrent job to an existing person or a rehire of someone already in the database.

See Chapter 6, "Increasing the Workforce," Reviewing Organizational Relationships, page 208.

Viewing the Status of a Template Based Hire

Access the Template Hire Status page.

 Copyright © 1988-2006, Oracle. All rights reserved.

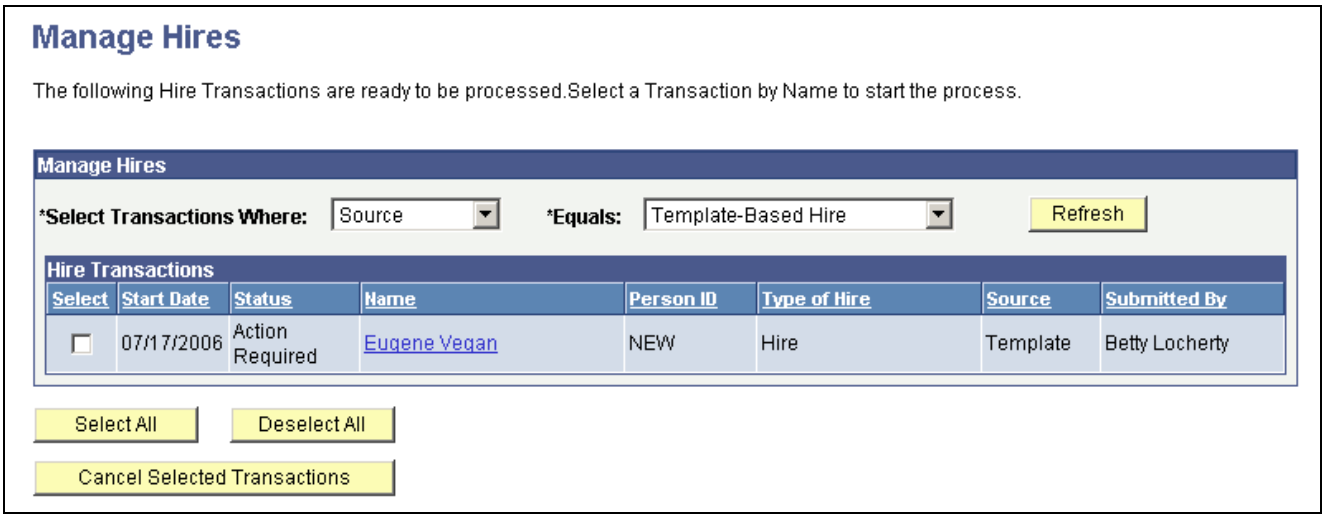


Template Hire Status page

View the status of the persons the you entered using the template based hire process. The end-user will only be able to view the persons they have entered in the system. The HR administrator will have access to view all persons entered through template based hires.

Managing Hires

Access the Manage Hires page.

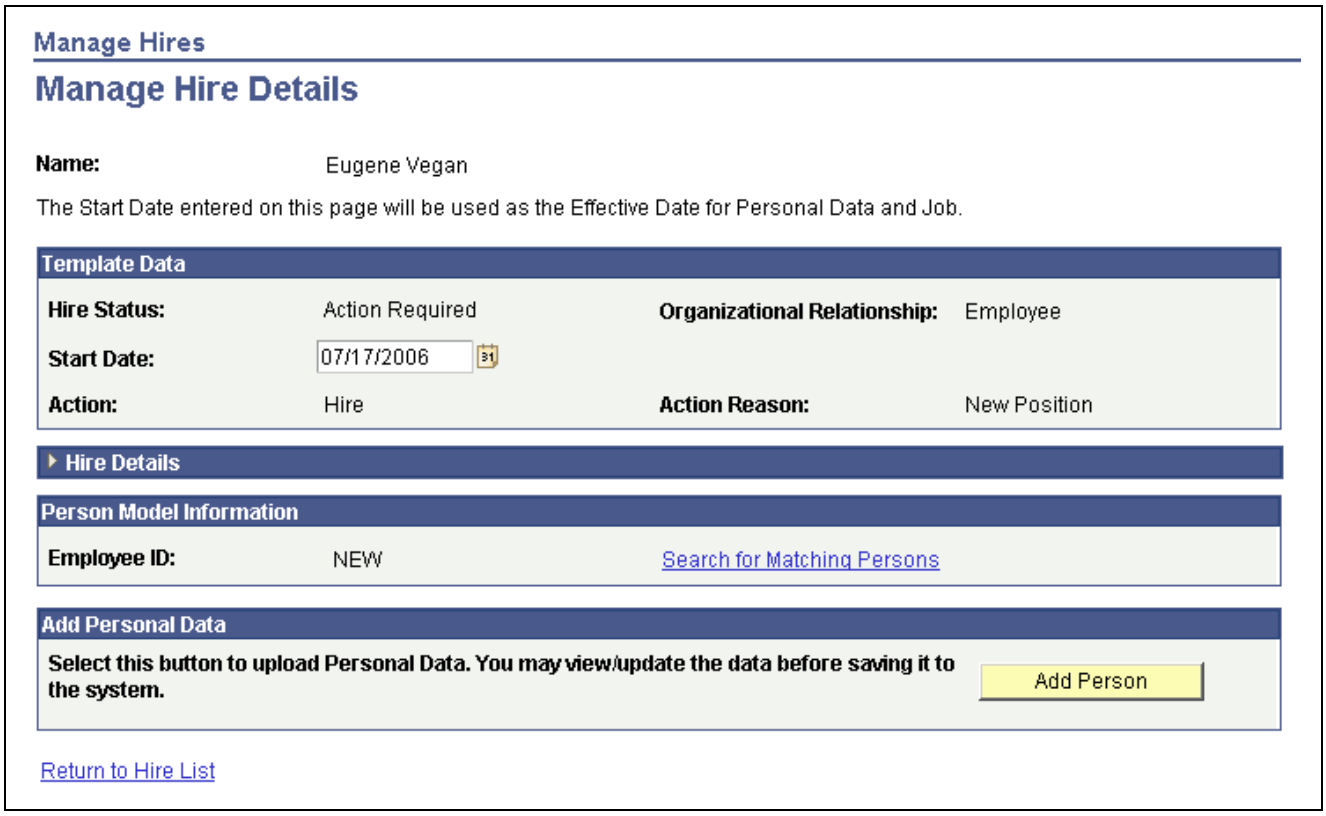


Manage Hires page

Copyright © 1988-2006, Oracle. All rights reserved.

The Manage Hires page is used by the HR administrator, not the end-user. The HR administrator uses this page to view hires that may be in draft status which the end-user started, view hires that require HR review prior to committing to the database, or review hires that encountered errors upon saving in order to review and complete the hire process.

When the template administrator sets up the templates they can select to turn Auto Update on or off. If Auto Update is on, the end-user is able to save the hire to the database, or save the hire in draft status. If Auto Update is off, then the end-user only has the option to save the hire as a draft or to submit the hire to HR. In these instances, the HR administrator uses the Manage Hires page to view people and continue with the hire process.



Manage Hire Details page

(BRA) Running Brazil Employment Reports

This section provides overviews of the CAGED report and employee registration and discusses how to:

- Generate CAGED reports.
- Generate employee registry reports.

Understanding the CAGED Report

The *Cadastro Geral de Empregados e Desempregados* – CAGED (General Register of Employed and Unemployed Individuals) is a permanent register of employee hirings and dismissals. Every establishment that has had any type of turnover (hiring, dismissing, or transferring employees who have employment contracts ruled by the Consolidated Labor Laws) is required to report that turnover to the Ministry of Labor and Employment.

 Copyright © 1988-2006, Oracle. All rights reserved.

The CAGED report generates a file containing the monthly turnover of employees by establishment.

Understanding Employee Registration

Employee registration provides evidence of length of service and length of social security contribution and proves the relationship between employee and employer. This information affects social security pensions. Companies must record their employees' data in books or cards.

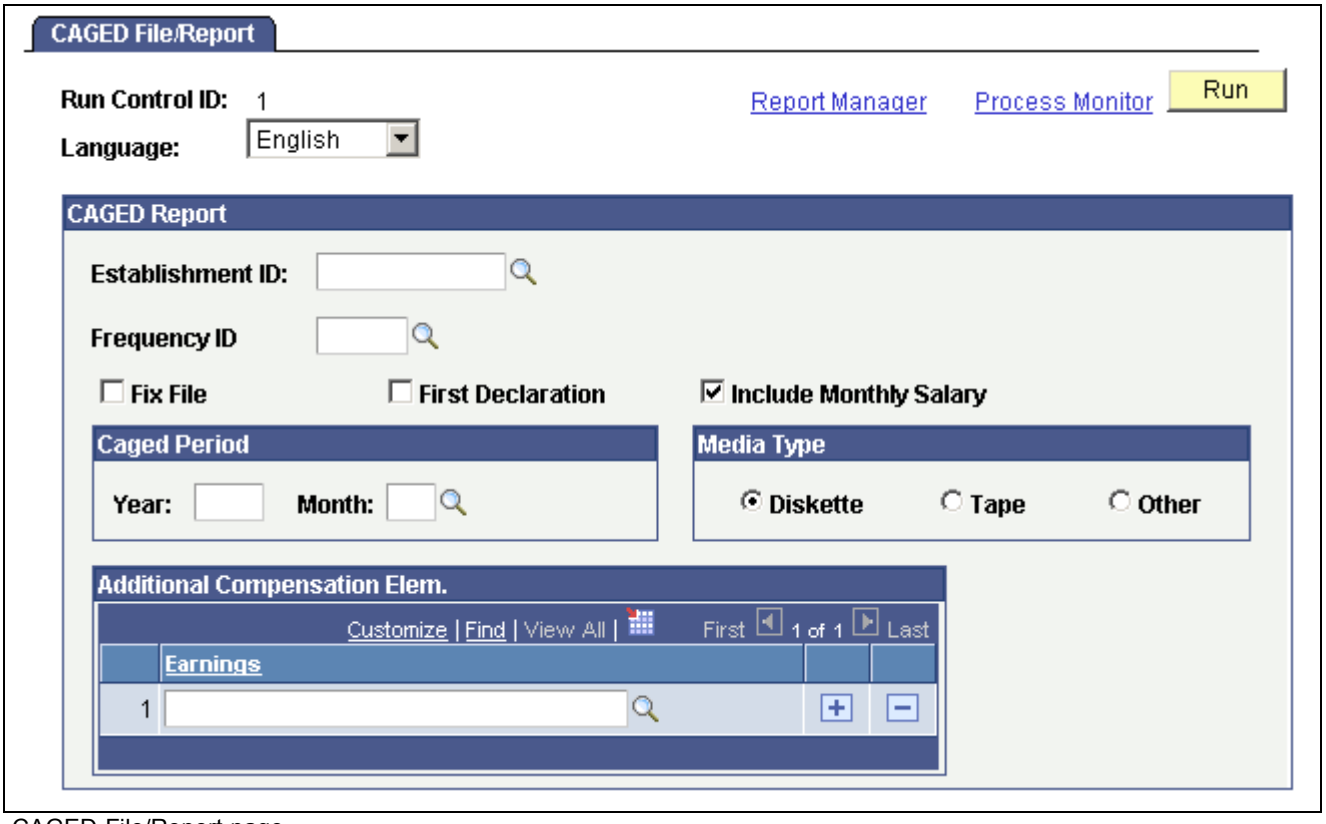
The employee registry report generates a flat file containing information about the employee's employment data (hire date, retirement date) and contributions. Keep the flat file as a record.

Pages Used to Run Brazil Employment Reports

Page Name	Object Name	Navigation	Usage
CAGED File/Report	CAGED_RC_BRA	Workforce Monitoring, Meet Regulatory Rqmts BRA, CAGED File/Report BRA	Generate CAGED reports.
Employee Registry Report	EMPL_REG_RC_BRA	Workforce Monitoring, Meet Regulatory Rqmts BRA, Employee Registry Report BRA	Generate employee registry reports.

Generating CAGED Reports

Access the CAGED File/Report page.



CAGED File/Report page

Copyright © 1988-2006, Oracle. All rights reserved.

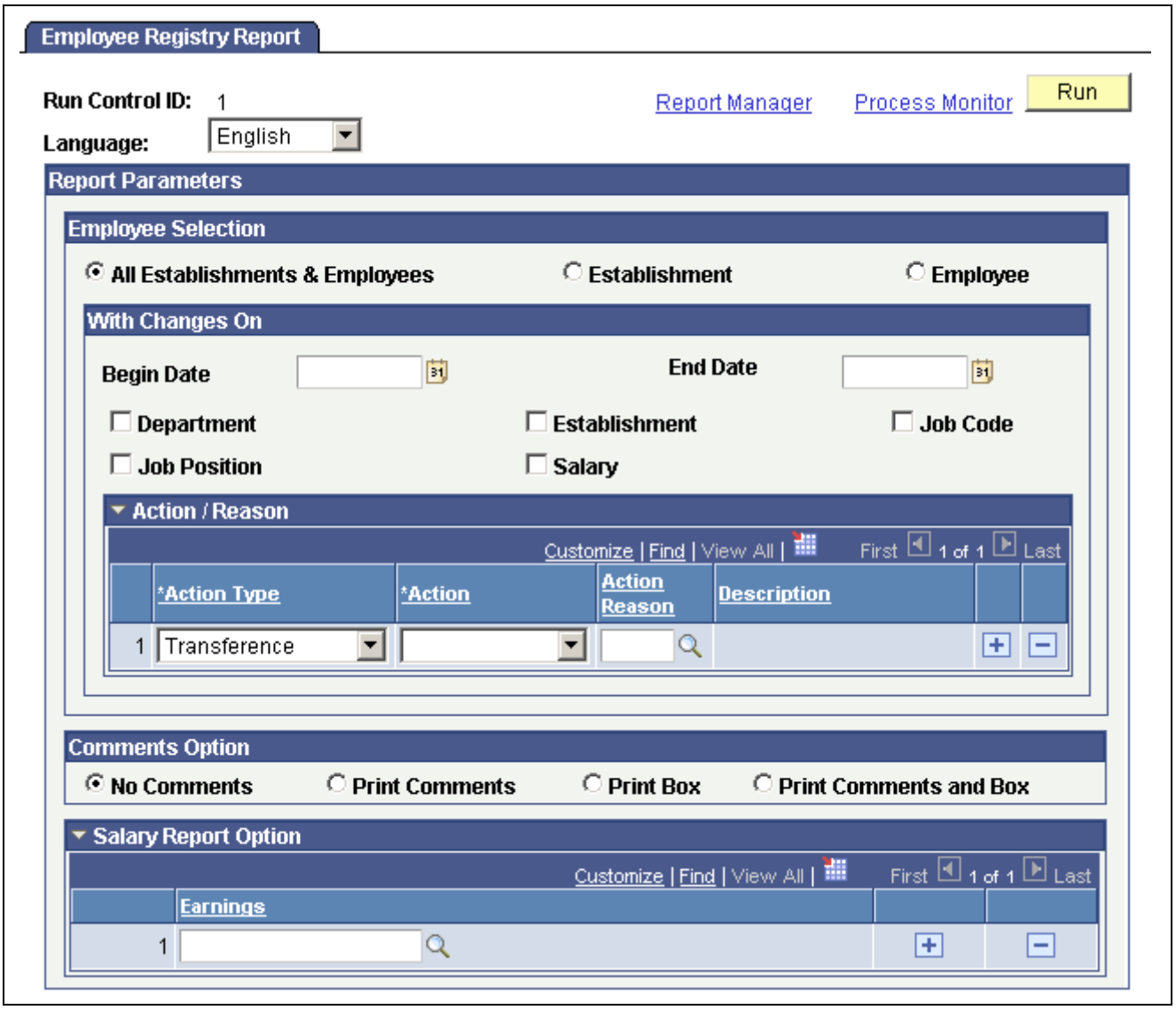
Frequency ID	Select the frequency.
Fix File	Select to generate an Fix (rightness) file. You generate a Fix file to send corrections to a previously sent file; it contains the same information as CAGED.
First Declaration	Select to indicate that this is the first statement that the establishment is sending to CAGED.
Include Monthly Salary	Select to include monthly salary in the report.
Media Type	Indicate how you are sending the file to CAGED. Values are: *Diskette* (floppy disk), *Tape* (magnetic tape or cartridge), or *Other*.
Additional Compensation Elem. (additional compensation elements)	If you use PeopleSoft Enterprise Global Payroll, enter earning components other than salary to report to CAGED.

Run the BRCGED01 process to generate the CAGED report.

Generating Employee Registry Reports

Access the Employee Registry Report page.

 Copyright © 1988-2006, Oracle. All rights reserved.



Employee Registry Report page

Employee Selection Select whether you want the report to include all employees and establishments or to include only a particular establishment or employee.

If you select the *Establishment* option, the Establishment ID, and Department fields appear.

If you select the *Employee* option, the EmplID field appears.

With Changes On This group box appears when you select either All Establishments & Employees or Establishment.

Begin Date and **End Date** Select the beginning and ending dates for the period for which you want to generate the Employee Registry report.

Establishment ID, Department, and **EmplID** Use these fields to restrict the number of employees for whom you generate an employee registry report.

Action Enter an action reason to generate employee registry reports only for employees with the specified action reason.

Copyright © 1988-2006, Oracle. All rights reserved.

Comments Option Select whether the report should not include comments or if it should print comments, print box, or print comments and box.

Salary Report Option If you use PeopleSoft Enterprise Global Payroll, you can include payroll information in this report. Enter earning components other than salary to include in this report.

Run the BREREG01 process to generate the Employee Registry report.

(CAN) Running the Canadian Hire List Report

This section lists the page used to run the Canadian Hire List report.

Page Used to Run the Canadian Hire List Report

Page Name	Object Name	Navigation	Usage
Hire List	RUNCTL_FROMTHRU	Workforce Administration, Job Information, Reports, Hire Report CAN, Hire List	Run the CAN Hire List report (PER100CN). This produces a hire list that provides information on social insurance numbers, effective dates, and badge or payroll numbers that are within the date range that is provided.

(NLD) Running the First Day Notification

This section discusses how to:

- Set up the First Day Notification.
- Generate First Day Notifications.
- View the First Day Notification results.

Understanding First Day Notifications

In the Netherlands, employers send First Day Notifications (*Eerstedagsmelding* [EDM]) to notify the Tax Authority when they hire or rehire employees.

Administer Workforce provides the First Day Notification NLD Application Engine process (HR_EDM_NLD) to generate the notifications. The run control page for the process enables you to search for employees who have been hired or rehired within a given period. You can review and adjust the list of employees before running the process, which creates XML files for transmission to the Dutch Tax Authority. You can view details of the First Day Notifications that have been generated using the Notification Results page.

Before you create First Day Notifications, use the Setup First Day Report NLD component (HR_SETUP_EDM_NLD) to define information required for each company.

 Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Set Up and Generate First Day Notifications

Page Name	Object Name	Navigation	Usage
First Day Report Setup	EDM_TXR_NLD	Set Up HRMS, Product Related, Workforce Administration, Setup First Day Report NLD, First Day Report Setup	For each company that submits first day notifications, set up the tax number suffix to use and specify the employee classes that are not included in the notifications.
First Day Notification	RUNCTL_EDM_NLD	Workforce Administration, Workforce Reports, First Day Notification NLD, First Day Notification	Use this page to search for employees who were hired or rehired within a given period, and generate the First Day notification for those employees. You can also adjust the list of hires and rehires before you run the report.
Notification Results	EDM_RSLT_NLD	Workforce Administration, Workforce Reports,First Day Notification NLD, Notification Results	View details of First Day Notifications that were previously generated using the First Day Notification NLD process.

Setting Up the First Day Notification

Access the First Day Report Setup page.



First Day Report Setup page

Federal Employer Tax ID Displays the company's employer tax ID that is specified on the Company — Default Settings page.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up Organization Foundation Tables," Setting Default Information for Companies.

Copyright © 1988-2006, Oracle. All rights reserved.

Tax Number Suffix Enter the tax number suffix to use for the first day notification. When you run the first day notification, the system combines the tax number suffix and the federal employer tax ID to create the employer ID that is included in the first day notification.

The default suffix is *L01*. If you want to use additional suffixes, name them *L02*, *L03,* and so on.

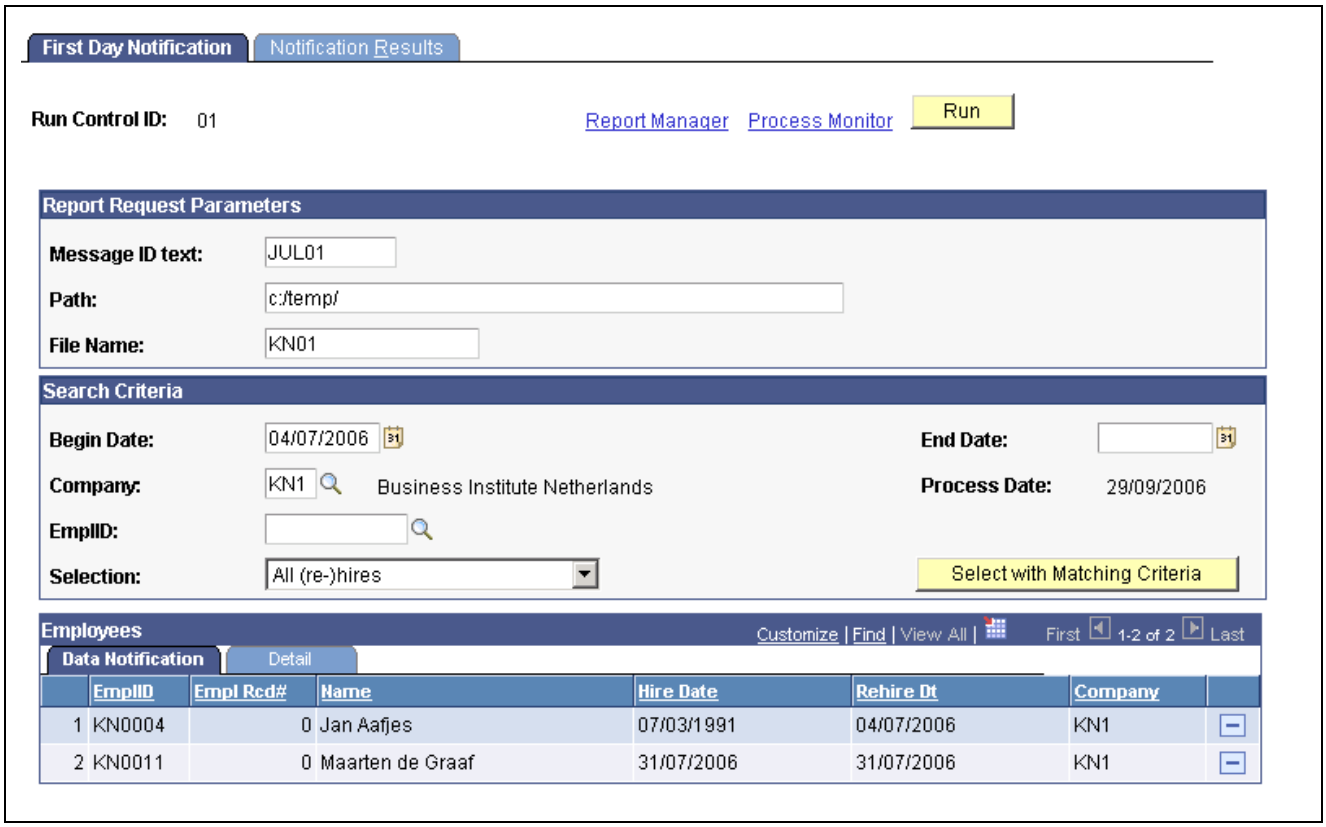
Exclude Employee Classes

Use this scroll area to define the classes of employees who are not included in first day notifications. Typically, temporary employees who are employed by an agency (*uitzendkrachten*) are not included in first day notifications, but your organization may have other classes of employees that are excluded from reporting.

Employee Classification Select the employee classes that you want to exclude from reporting. Employee classes are defined by setID on the Empl Class Table page and assigned to employees on the Job Data - Job Information page.

Generating First Day Notifications

Access the First Day Notification page.



First Day Notification page

Message ID Text Enter free format text that is combined with the company's federal employer tax ID and the tax number suffix to form the message ID in the XML file. Use the First Day Report Setup page to define the tax number suffix to use.

Copyright © 1988-2006, Oracle. All rights reserved.

Path Enter the location of the XML file that is created by the First Day Notification NLD process. Enter an absolute path name, such as c:/temp/, or a relative path such as \\machinename\temp.

File Name Enter the name of the XML file that is created by the First Day Notification NLD process. The process generates files with file names that combine the file name you enter here with the employee ID and employee record number.

Search Criteria

Use this group box to specify the search criteria for the First Day Notification.

Begin Date, End Date Enter the dates for the reporting period. The system searches for hires and rehires that occurred within this period.

Company, EmplID (employee ID) Select a company to search for hires and rehires within that company, or select an employee if you want to run the report for a specific person.

Leave this field blank to run the report for all companies.

Selection Select one of these values:

New (re-)hires: To include only those hires and rehires that have not been previously reported.

All (re-)hires: To include all hires and rehires that occurred in the period defined by the begin and end dates. Use this option if you want to rerun the notification for a period. For example if you have changed employee data and you need to recreate the notification, use this option to run the report.

Select with Matching Criteria Click this button to search for employees who match the criteria you entered in the Search Criteria group box. The system displays matching employees in the Employees scroll area.

Employees

This scroll area lists the employees who matched the search criteria that you specified. Review the employee details and delete any employees you don't want to include in the report. When you click the Run button to run the First Day Notification NLD process, the system generates a notification for the employees that are listed in the scroll area.

Note. The system includes employees whose Regulatory Region is *NLD* only. Employees' regulatory region is defined on the Job Data - Work Location page.

Hire Date, Rehire Dt (rehire date) Displays the employee's hire or rehire date.

Action, Reason Code Displays the action and reason code that were used for the hire or rehire. The system includes employees with the HIR (hire) action or REH (rehire) action codes only.

Empl Class (employee class) Displays the employee class that is assigned to the employee on the Job Data - Job Information page.

Viewing the First Day Notification Results

Access the Notification Results page.

Copyright © 1988-2006, Oracle. All rights reserved.



Notification Results page

Search Criteria

Process Date Enter a process date if you want to view details of the First Day Notifications generated on a given date.

Company, Select a company to view details of the First Day Notifications that have been generated for employees in that company.

EmplID Select an employee ID to view details of that person's First Day Notification.

Message ID Enter a message ID if you want to view the employees who were included in a specific message ID.

Select with Matching Criteria Click this button to to search for employees whose First Day Notifications match the criteria you entered in the Search Criteria group box.

Employees

This scroll area lists the employees whose First Day Notifications match the search criteria.

Hire Date Displays the employee's hire or rehire date.

Time Reported Displays the time that the notification was generated.

Message ID Displays the message ID. This is generated by the First Day Notification process by combining the message ID text you specified on the First Day Notification page, the company's employer tax ID, the tax number suffix, and the employee ID.

Copyright © 1988-2006, Oracle. All rights reserved.

CHAPTER 7

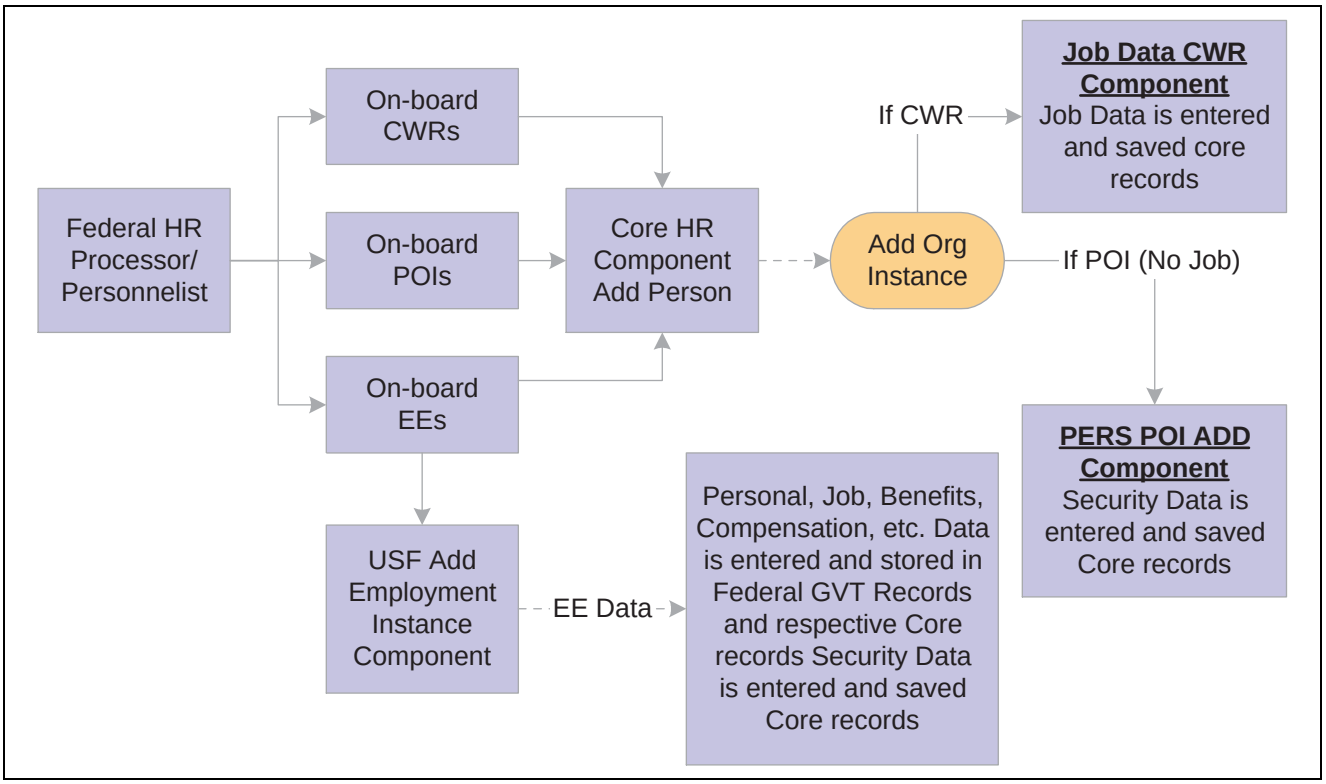
(USF) Adding an Employment Instance

This chapter provides an overview of hiring U.S. federal government employees and discusses how to:

- Add an employment instance.
- Enter education information.
- Assign employees to positions.
- Hire job applicants.
- Add concurrent jobs.
- Print appointment affidavits and preliminary employment data forms.

Understanding U.S. Federal Hiring

This diagram shows the process for hiring U.S. federal government employees:



Hiring U.S. Federal Government Employees

Copyright © 1988-2006, Oracle. All rights reserved.

Use the Add Employment Instance USF component to enter federal employment data for hiring an existing person of interest (POI) or contingent worker (CWR) as a federal employee. You also use this component to create additional appointments for existing federal employees.

See Chapter 5, "Adding a Person in PeopleSoft Human Resources," Adding a Person, page 109.

The pages that are included in the PAR process store specific information and contain links to supplemental pages that provide further details. The following table lists four components:

Component	Navigation Path	When to Use
Add Employment Instance USF	Workforce Administration, Job Information, Add Employment Instance USF	To create a federal employment instance using an existing person of interest (POI) or contingent worker (CWR) data. If a person is already an existing employee, this component will increment the employment record number to accommodate the new federal job.
Supervisor Request	Workforce Administration, Job Information, Supervisor Request USF	See Chapter 17, "(USF) Administering Personnel Action Requests," Tracking and Routing a PAR Through Reviews and Completion, page 603. See *PeopleSoft Enterprise eProfile Manager Desktop 9.0 PeopleBook*, "(USF) Managing Direct Reports".
Cancel Personnel Action	Workforce Administration, Job Information, Cancel Personnel Action USF	See Chapter 17, "(USF) Administering Personnel Action Requests," Canceling or Correcting a Personnel Action Request, page 609. This component is used when a cancellation (NOA 001) personnel action is necessary.
Correct Personnel Action	Workforce Administration, Job Information, Correct Personnel Action USF	See Chapter 17, "(USF) Administering Personnel Action Requests," Canceling or Correcting a Personnel Action Request, page 609. This component is used when a correction (NOA 002) personnel action is necessary.

 Copyright © 1988-2006, Oracle. All rights reserved.

Enter personal information, employment information, job data, compensation, job earnings distribution information , and benefit program choices. You must enter this information before you can perform any other human resource tasks in PeopleSoft Enterprise Human Resources. Because many of the fields on these pages are required, enter information in all the pages *before* saving your entries.

See Also

Chapter 17, "(USF) Administering Personnel Action Requests," Understanding the Administering PAR System, page 601

Chapter 6, "Increasing the Workforce," Understanding Template-Based Hires, page 209

Common Elements Used in This Chapter

Transaction#/Sequence — Set by default to *1/1*—the correct numbers for new employees. Your agency can use these numbers to track both the individual transactions for this employee and the multiple administrative actions that occur on the same day.

This field controls the order in which actions are processed internally and the order in which they are output across interfaces. After you save a request, the system automatically increments it by one for each new action effective on the same day. If human resources personnel perform a correction of the original hire request, the correction's assigned value is *1/2* (*1* is the transaction number for this particular action for this employee on this day and *2* is the sequence number for any correction of this action for this employee on this day).

PAR Status (Personnel Action Request status) — References the status of this request within the PAR request/approval process. On the Data Control page, this field is set by default to *PRO* (Processed by HR). If you choose to save with this (PRO) status, the personnel action information is saved and applied as its "finalized" state. The value that remains after you leave this page is the displayed status on other pages within the component.

NOA Code (nature of action code) — The Federal numerical code that applies to this personnel action.

OK — Click to close this page.

Adding an Employment Instance

This section provides an overview of adding an employment instance and discusses how to:

- Enter information for the employment instance.
- Enter PAR remarks.
- Enter job tracking information.
- Enter employee personal information.
- Enter birth information.
- Enter address information.

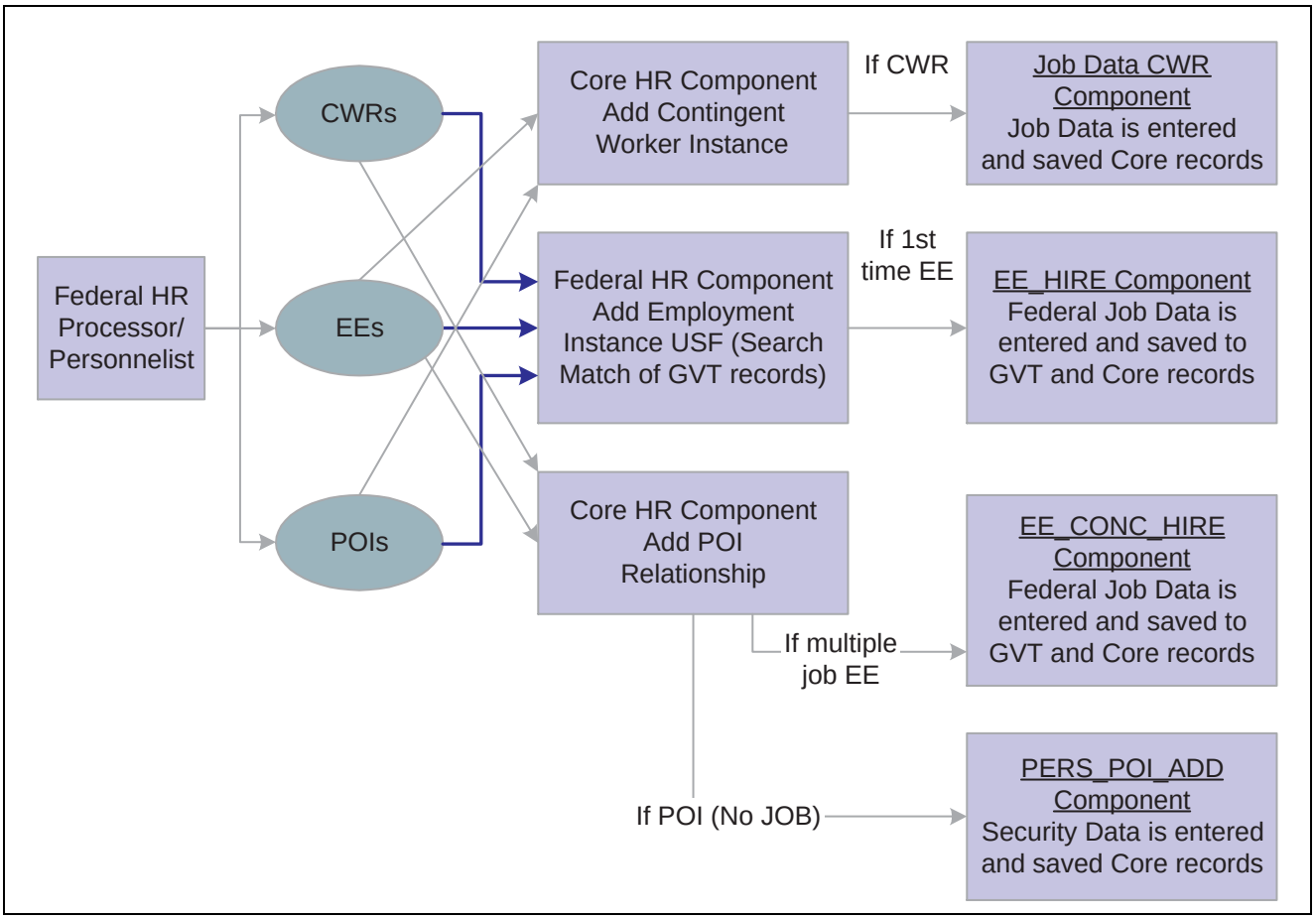
Copyright © 1988-2006, Oracle. All rights reserved.

- Enter veteran information.
- Enter marital information.
- Enter education details.
- Enter job information.
- Specify benefit programs.
- Enter retirement data.
- Track information for employees on assignment.
- Enter NFC job information.
- Enter position information.
- Enter employee compensation information.
- Enter additional compensation information.
- View pay rate and compensation calculations.
- View job earnings distributions.
- Enter current and historical employment information.
- Enter expiration dates.
- Enter appointment limits.
- Enter additional employment information.
- Track probation dates.
- Track nonpay status information.
- Enter financial disclosure information.
- View Component Interface exceptions.

Understanding Adding an Employment Instance

The following diagram shows the process flow of hiring an employee:

 Copyright © 1988-2006, Oracle. All rights reserved.



Process flow for adding Federal employment instances

Use the Core HR component “Add Person” as a common starting point for initially entering contingent workers and persons of interest. If your organization allows employees to hold more than one job, use the Concurrent Hire component to enter new jobs for employees who already have one or more jobs. The component consists of the Data Control, Job, Position, Compensation, Employment 1, and Employment 2 pages.

If an employee has more than one job, you may want to designate one job as primary and others as secondary. The primary job designation is used for government reporting.

Before you can add multiple jobs for your workforce, you must:

- Select the Multiple Jobs Allowed check box in PeopleTools.
- Update user security so that users have access to the menu options they’ll need.

See Also

Chapter 5, “Adding a Person in PeopleSoft Human Resources,” page 109

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Setting Up and Working with Group Definitions”

Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Add an Employment Instance

Page Name	Object Name	Navigation	Usage
Add Employment Instance USF	FEDERAL_EMP_ADD	Workforce Administration, Job Information, Add Employment Instance USF, Add Employment Instance USF	This component uses existing data from a person of interest or contingent worker in the new federal employment instance. Use existing data for a person of interest or a contingent worker in the new federal employment instance.
Add New Assignment	PER_ORG_INST_ASGN	Enter a valid Person ID on the Add Employment Instance USF page and click the Add the Relationship link.	Add a new assignment (concurrent job) for an existing Person ID.
Data Control	GVT_JOB0	Click the Create Assignment button on the Add New Assignment page. The component opens in a new window.	Enter information for the hiring process, such as the NOA code, approving authorities, PAR remarks, and tracking information.
PAR Remarks	GVT_PAR_PROCESS_RK	Click PAR Remarks on the Data Control page.	Enter or look up comments specific to this position or employee situation.
Job Tracking Info	GVT_EE_CNTRL_SEC	Click Tracking Data on the Data Control page.	View or enter job-tracking information.
Personal Data	GVT_PERS_DATA1	Select the Personal Data page within the Add Employment Instance USF component. If previous personal data exists that is associated with an individual as a Person of Interest or a Contingent Worker, this information is displayed by default on the Personal Data page. (Note: the Personal Data page does not display when you are entering an additional assignment for a federal employee.)	Enter the employee's personal information, such as name, address, birthplace, education, military service, citizenship, veteran, marital status, race or origin, and handicap.
Addl Birth Info (additional birth information)	GVT_BRTHINF_SEC	Click Additional Birth Info on the Personal Data page.	Enter birth information.
Address Information	GVT_ADDRINF_SEC	Click Mailing Address on the Personal Data page.	Enter contact (home) and mailing address information.
Personal Phone Numbers	GVT_PERS_PH_SEC	Click Personal Phone Numbers on the Personal Data page.	Enter employee phone, fax, cellular, and other numbers.

Copyright © 1988-2006, Oracle. All rights reserved.

Page Name	Object Name	Navigation	Usage
Veterans Info	GVT_VETINF_SEC	Click Veterans Info on the Personal Data page.	Enter veteran information.
Marital Status	GVT_MARITAL_SEC	Click Marital Info on the Personal Data page.	Enter marital information.
Education Details	GVT_EDUCINF_SEC	Click Education Details on the Personal Data page.	Enter education details. **Note.** This link is valid only for new hires. See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles*, "Managing Profiles," Creating and Updating Person Profiles.
Job	GVT_JOB1	Select the Job page from within the Add Employment Instance USF component.	Enter job information, including the employee's position, agency, and department.
Benefits/FEHB Data (Benefits / Federal Employees Health Benefits Data)	GVT_BENDATA_SEC	Click Benefits/FEHB Data on the Job page.	Specify benefit programs in which the employee is enrolled in PeopleSoft Enterprise Human Resources or in PeopleSoft Enterprise Benefits Administration.
FEGLI/Retirement/FICA (Federal Employees Group Life Insurance / Retirement / Federal Insurance Contributions Act)	GVT_BENDATA1_SEC	Click FEGLI/Retirement/FICA on the Job page.	Enter life insurance and retirement data.
Departmental Hierarchy	GVT_DEPTINF_SEC	Click Departmental Hierarchy on the Job page.	View departmental hierarchy for the individual's position.
Detail Assignment	GVT_DETAIL_SEC	Click Detail on the Job page.	Track information for employees on a detail assignment. You probably won't use this page when first hiring an employee.
NFC Job Information	GVT_NFC_JOB_SEC	Click the NFC Job Information link.	Track required National Finance Center (NFC) information for employees. Enter Job, Benefits and Payroll values necessary for processing this employee at NFC.

Copyright © 1988-2006, Oracle. All rights reserved.

Page Name	Object Name	Navigation	Usage
Position	GVT_JOB2	Select the Position page from within the Add Employment Instance USF component.	Enter position information like employee type, classification, appointment type, work schedule, and pay group.
Compensation	GVT_JOB3	Select the Compensation page from within gthe Add Employment Instance USF component.	Enter employee compensation information, including pay rate determinant, pay plan/table/grade/step, frequency, and other pay. You can also enter retained pay plan/table/grade and step on this page.
Other Pay Information	GVT_OTH_PAY_SEC	Click Other Pay Information on the Compensation page.	Enter compensation that employees receive that's in addition to base pay.
Expected Pay	GVT_LOC_PAY_SEC	Click Expected Pay on the Compensation page.	View the various pay rate and compensation calculations the system calculates and displays based on the base pay and compensation frequency you enter on the Compensation page.
Accounting Information	GVT_JOBDIST_SEC	Click Accounting Info on the Compensation page.	View a summary of the employee's job earnings distribution.
Employment 1	GVT_EMPLOYMENT1	Select the Employment 1 page from within the Add Employment Instance USF component.	Enter employment information, such as employee service computation and conversion dates, and within-grade-increase data.
Expiration Dates	GVT_EXPIRDT_SEC	Click Exp Dates on the Employment 1 page.	Enter expiration dates for temporary promotions, position changes, sabbaticals, or detail assignments.
Appointment Info	GVT_APPDATA_SEC	Click Appt Data on the Employment 1 page.	Enter appointment limits and indicate if this person is in a special employment program.
Employment 2	GVT_EMPLOYMENT3	Select the Employment 2 page from within the Add Employment Instance USF component.	Enter additional employment data including union, probation, RIF, tenure, and security data. Also record the retained grade information.

Copyright © 1988-2006, Oracle. All rights reserved.

Page Name	Object Name	Navigation	Usage
Probation Dates	GVT_EMPL_PROB_SEC	Click Prob Dates on the Employee 2 page.	Document any probation start and end dates that apply to this person.
Non Pay Data	GVT_NONPAY_SEC	Click Non Pay Data on the Employment 2 page.	Track information related to a status of nonpay. Information on this page affects FEHB eligibility and FEGLI.
Financial Disclosure	GVT_SECURTY_SEC	Click Financial Disclosure on the Employment 2 page.	Indicate if financial disclosure is required and the due date.
Time and Labor Data	TL_EMPL_DATA_FG_S	Click Time Reporter Data on the Employment 2 page.	Review PeopleSoft Time and Labor data for this employee.
CI Exceptions	GVT_PAR_CI_MSG	Select the CI Exceptions page from within the Add Employment Instance USF component.	Warning messages generated during the hire process are displayed on the CI Exceptions page after the transaction has been successfully saved.

See Also

Chapter 6, "Increasing the Workforce," Increasing the Workforce Through Templates and Job Applicants, page 208

Creating a New Employment Instance

Access the Add Employment Instance USF page.



Add Employment Instance USF page

Use this component if you have already entered information about a person, for example, in the Add a Person component.

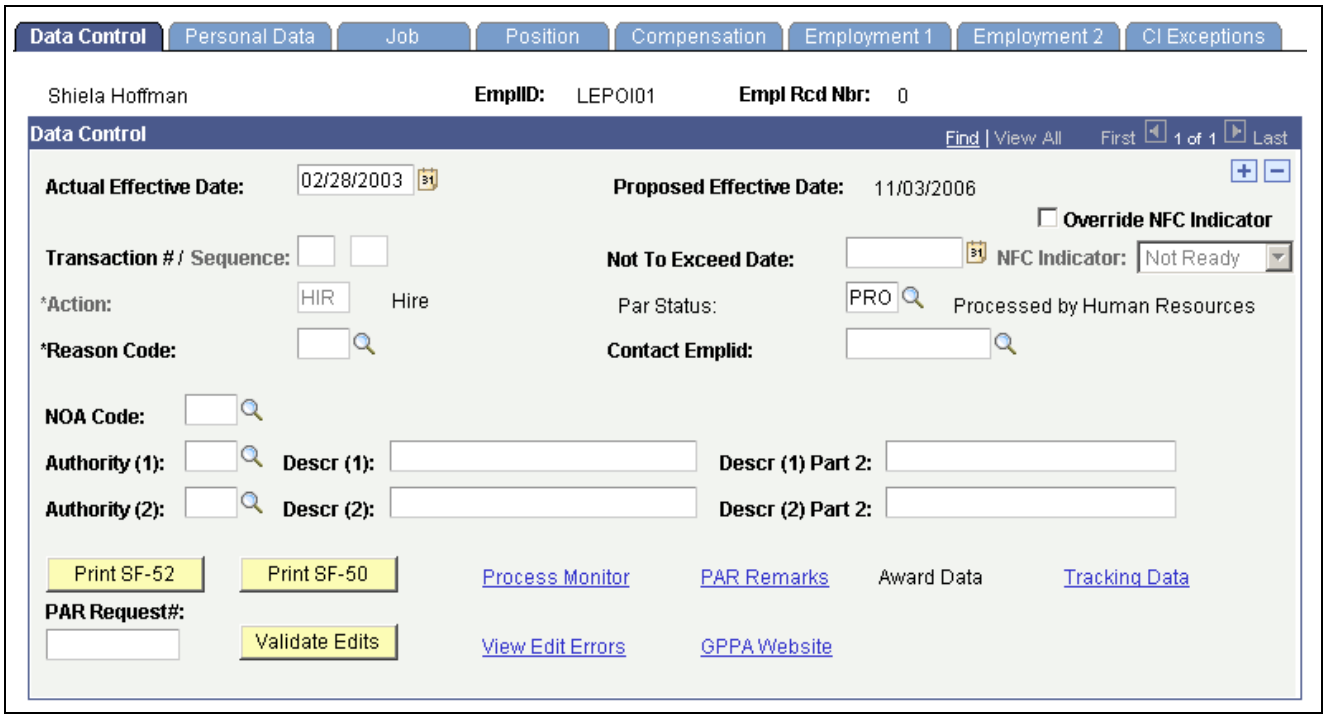
Enter a Person ID and click the Add the Relationship link to create a federal employment instance for a person of interest or to create a concurrent job for an existing federal employee.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Working with Search/Match," Working with Search/Match.

Entering Information for the Employment Instance

Access the Data Control page.

Copyright © 1988-2006, Oracle. All rights reserved.



Data Control page

Actual Effective Date Enter the actual effective date, which is used as the default effective date of the action throughout the system. If necessary, change this to reflect the effective date of the new employment instance. When working on other pages, these dates are unavailable, so if you need to change the effective date, return to the Data Control page.

Proposed Effective Date This field is populated by default with the date that is entered in the Actual Effective Date field. Human resources personnel processing a request have final authority on when the action becomes effective, and they will enter the official actual effective date, but the proposed effective date will remain unchanged.

Override NFC Indicator Select this check box to override the value in the NFC Update Indicator field.

Not to Exceed Date (Optional) Enter the ending date of a temporary action (for example, the date a temporary job expires).

NFC Indicator Status of the transaction in relation to NFC, as maintained by the user or system. Options include *Not Ready*, *Ready*, *In Process*, *SINQ*, and *Other*:

- *Not Ready* – Excludes this PAR transaction from export to NFC.
- *Ready* – Includes this PAR transaction in the next NFC export.
- *In Process* – This PAR transaction has been run through the export program and will be sent to the NFC.
- *SINQ* – This PAR transaction has not successfully passed NFC's PINE edits and needs correction.
- *Other* – Status maintained by a system user.

Copyright © 1988-2006, Oracle. All rights reserved.

Action The default value for this field depends on whether the employment instance is for a new employee or is based on existing data for a current employee, person of interest, or contingent worker.

Reason Code A default reason code may display in this field. Otherwise, enter the reason code for this employment instance, such as new position, temporary assignment, or trainee.

Note. For agency-to-agency transfers, the request may be submitted by both agencies, and the action and reason for each agency's request depends on whether the employee is arriving or leaving. If the employee is arriving, process the action as a hire. When an employee transfers into your agency from another agency, the action is *Hire* and the reason is *Transfer From* (another agency). When an employee transfers out of your agency to another agency, the action is *Terminate* and the reason is *Transfer To* (another agency).

Contact Emplid (contact employee ID) Enter the employee ID of the person to contact with any questions regarding the hire.

Authority (1) and **Authority (2)** Select the appropriate legal authority for this NOA code. This field is usually reserved for use by human resources specialists. PeopleSoft provides a list of common legal authority codes and descriptions as provided by the US Office of Personnel Management.

PAR Request # (PAR request number) (Optional) Enter a PAR request number for each employee request after you save this request. This field is for your agency's information only.

PAR Remarks Click to view or enter comments specific to this position or employee situation.

Tracking Data Click to view or enter job-tracking information.

Award Data This link is active only for award and bonus personnel actions.

See Chapter 18, "(USF) Processing Personnel Action Requests," Granting Performance Awards, page 629.

Validate Edits Initiates online regulatory edits for this PAR row. Edits should be triggered after all hire information is entered.

Note. Validation is an optional step.

Depending on the state of the transaction, all edits may not run to completion because all data may not have been captured up to that point.

Process Monitor Click this link to monitor the status of the validation batch job.

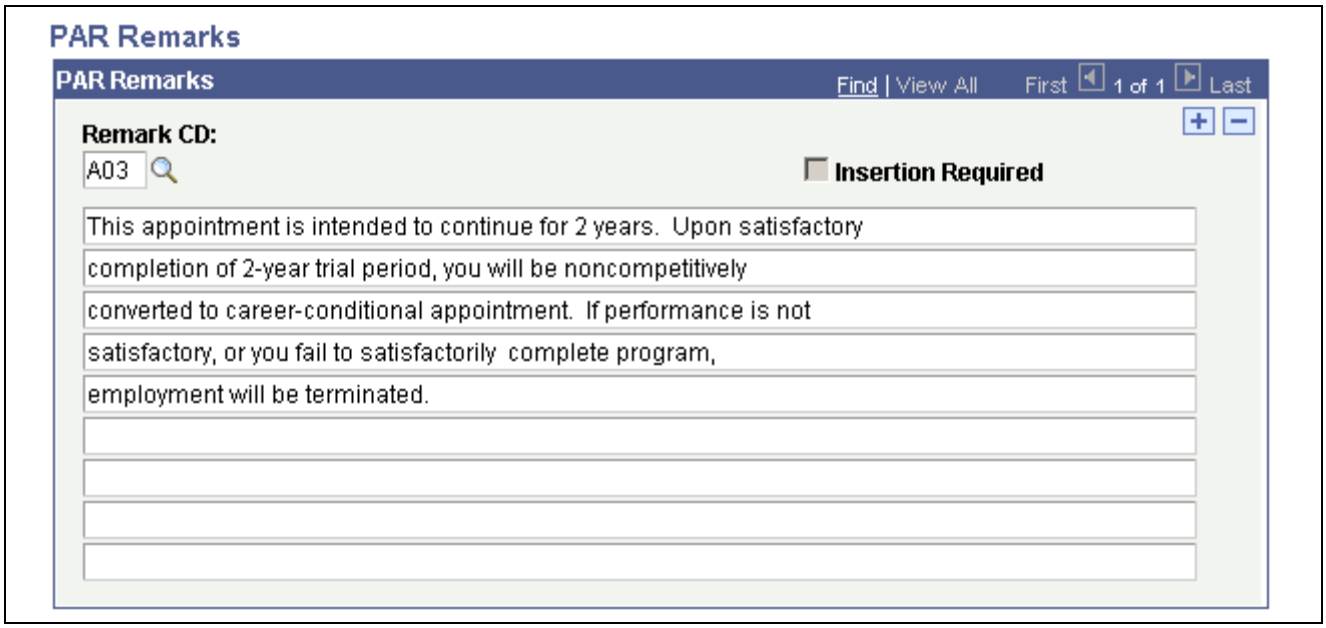
View/Edit Errors View regulatory edit errors resulting from the validation process. Correct any errors and validate the transaction again.

GPPA Website Click this link to open the Personnel Documentation page of the Office of Personnel Management website (http://www.opm.gov/feddata/gppa/gppa.asp).

Entering PAR Remarks

Access the PAR Remarks page.

Copyright © 1988-2006, Oracle. All rights reserved.



PAR Remarks page

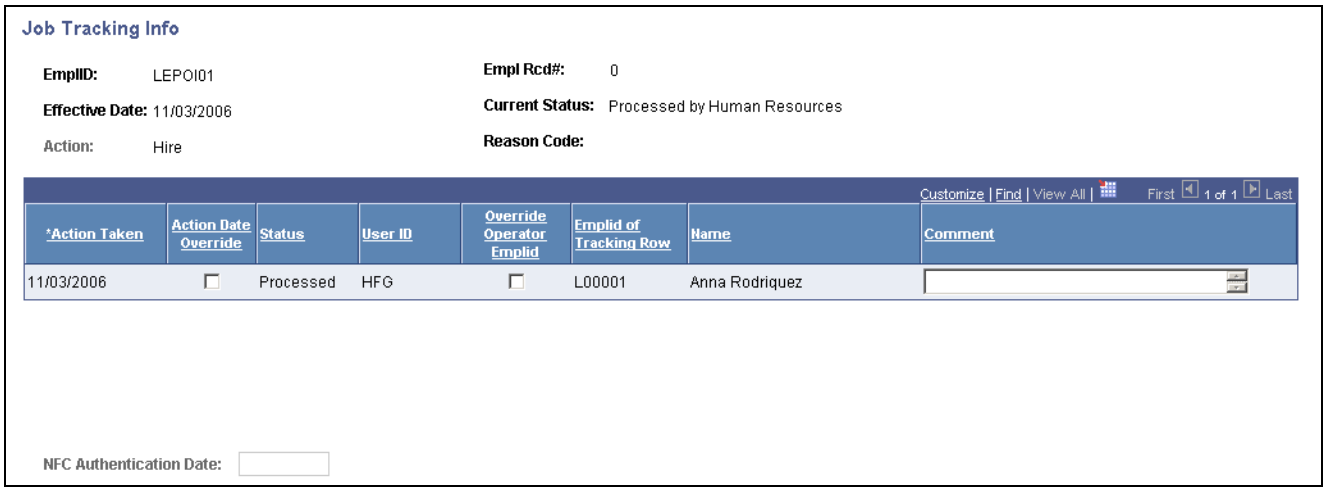
Remark CD (remark code) Select from the list of descriptions, conditions, and comments about this position or employee action. The remarks that you select appear in the comments box. Edit them as necessary.

Insertion Required If this remark needs employee-specific information, this check box is selected. The default settings for this box are defined with the codes on the PAR Remarks Table page.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "(USF) Setting Up Human Resources Management Tables".

Entering Job Tracking Information

Access the Job Tracking Info page.



Job Tracking Info page

Action Taken Displays the date that the action request was entered.

Copyright © 1988-2006, Oracle. All rights reserved.

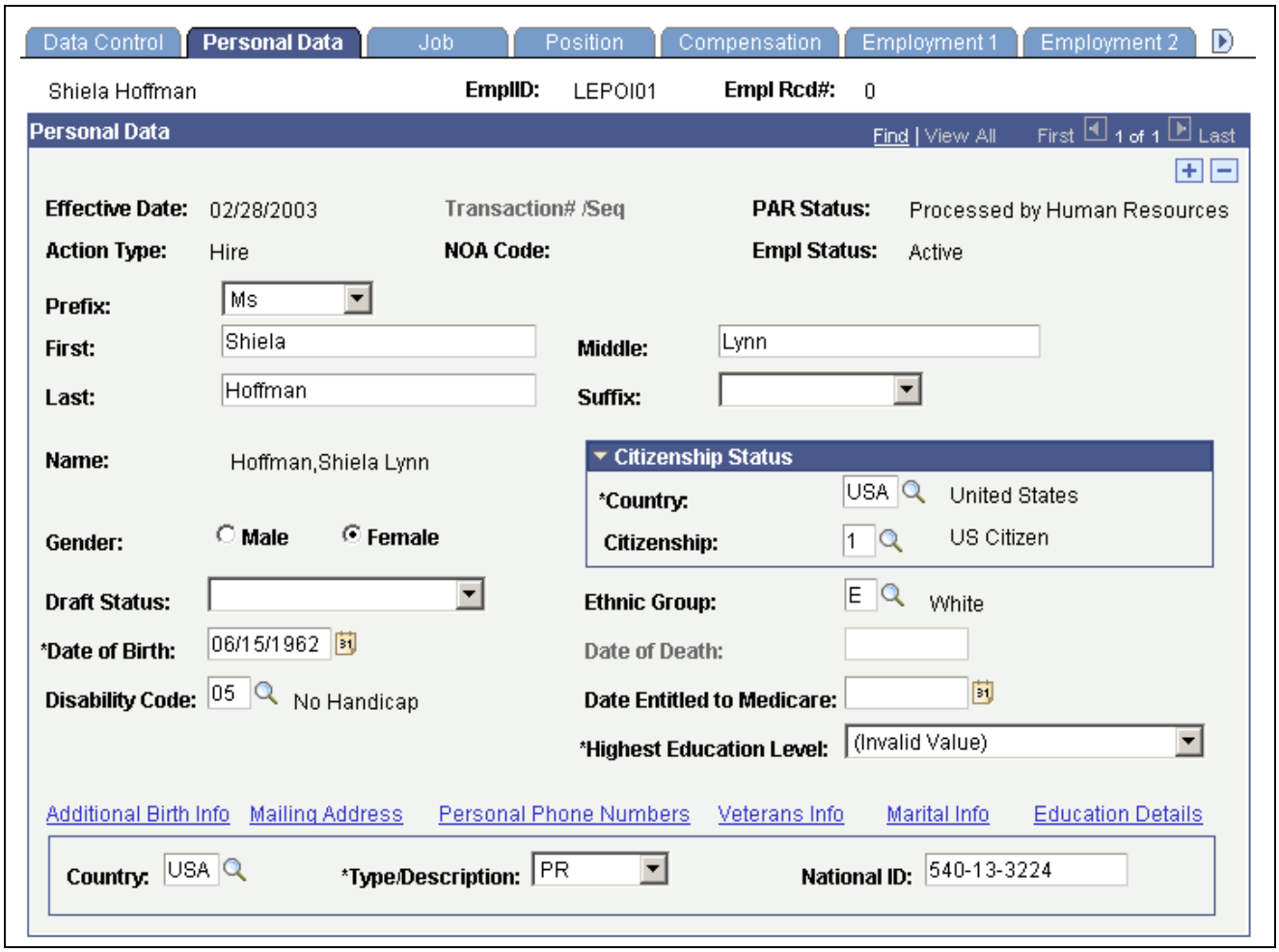
Action Dt Ovrd (action date override)	Select to make the Action Taken field available for entry so that you can change the action date.
Override Operator Emplid (override operator employee ID)	(Optional) Select this check box when an administrative assistant, for example, enters data on behalf of a supervisor.
Emplid of Tracking Row (employee ID of tracking row)	When the Override Operator Emplid check box is selected, this field becomes available for entry. Enter the ID of the person actually performing the data entry.
NFC Authentication Date	The Authentication Date is the NFC equivalent of the PAR Approved/Signed action date. The date when the PAR status is updated to the Approved/Signed status is displayed in this field by default, but you can change the field entry. The primary purpose of the field is to provide the approval date printed on the employees personnel action standard forms.

Entering Employee Personal Information

Access the Personal Data page.

Note. If a person already exists in the system, as a contingent worker for example, default field entries are displayed in some fields on the Personal Data page when you access it through the Add Employment Instance USF component.

Copyright © 1988-2006, Oracle. All rights reserved.



Personal Data page

EmplID When you create a concurrent job, or an employment instance for a person of interest or contingent worker, the previously assigned Person ID is displayed.

Effective Date The effective date for all of the pages in this group box is set by default to the effective date that is entered on the Data Control page. Change the effective date by returning to the Data Control page.

Gender Indicate the employee's gender.

Citizenship Status Select the appropriate citizenship status.

Draft Status (Optional) Select a draft status.

Ethnic Group Select the employee's ethnic group. Values are based on U.S. Federal Equal Employment Opportunity (EEO) ethnic categories. Use ethnic group information to compile the establishment's Affirmative Action (AA) plan and to generate several EEO reports.

Date of Birth Enter the employee's date of birth. If you do not enter a birth date, a warning message appears when you save the record. Although this field isn't required for the Administering Workforce business process, the system uses the date in some benefit and payroll tasks to calculate an employee's age. If you do not have the birth date currently, after you acknowledge the message, you

 Copyright © 1988-2006, Oracle. All rights reserved.

	can continue entering information. However, it is recommended that you enter the information later.
Date of Death	Skip this field when hiring an employee.
Disability Code	Select the disability code from the list, or if none, select the value *No Handicap*.
Date Entitled to Medicare	(Optional) Enter the date the employee is entitled to Medicare.
Country	Many countries have unique name formats. Select the country with the name format you want to use for this person. When you move out of this field, the system displays the appropriate fields for the country you entered.
Type/Description	Enter the corresponding type/description of the employee's national ID.
National ID	Enter the employee's Social Security Number.
Additional Birth Info	Click to access the Addl Birth Info page and enter the employee's birth information.
Mailing Information	Click to access the Address Information page and enter home and mailing address information.
Personal Phone Numbers	Click to access the Personal Phone Numbers page and enter employee phone, fax, cellular, and other numbers.
Veterans Info (veterans information)	Click to access the Veterans Info page and enter veterans information.
Marital Info (marital information)	Click to access the Marital Status page and enter marital information.
Education Details	Click to access the Education Details page and enter information about the employee's education.

See Also

Chapter 18, "(USF) Processing Personnel Action Requests," Requesting Terminations Due to Death, page 634

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements, "(USA) Meeting Regulatory Requirements for the United States"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Benefits

Entering Birth Information

Access the Addl Birth Info page.



Addl Birth Info page

Birth Location	Enter the name of the city.

Copyright © 1988-2006, Oracle. All rights reserved.

Birth State Select the birth state.

Birth Country Select the birth country.

Entering Address Information

Access the Address Information page.



Address Information page

Select the country and then click Edit Address. Fill out the address fields on the page that appears and click OK. The address information appears in the Address field.

Geo Location (geographic location) Geographic location code for state/country, city, and county for the residence address. This is prompted from the Geographic Location table.

State/County Code State/County code of the check mailing address.

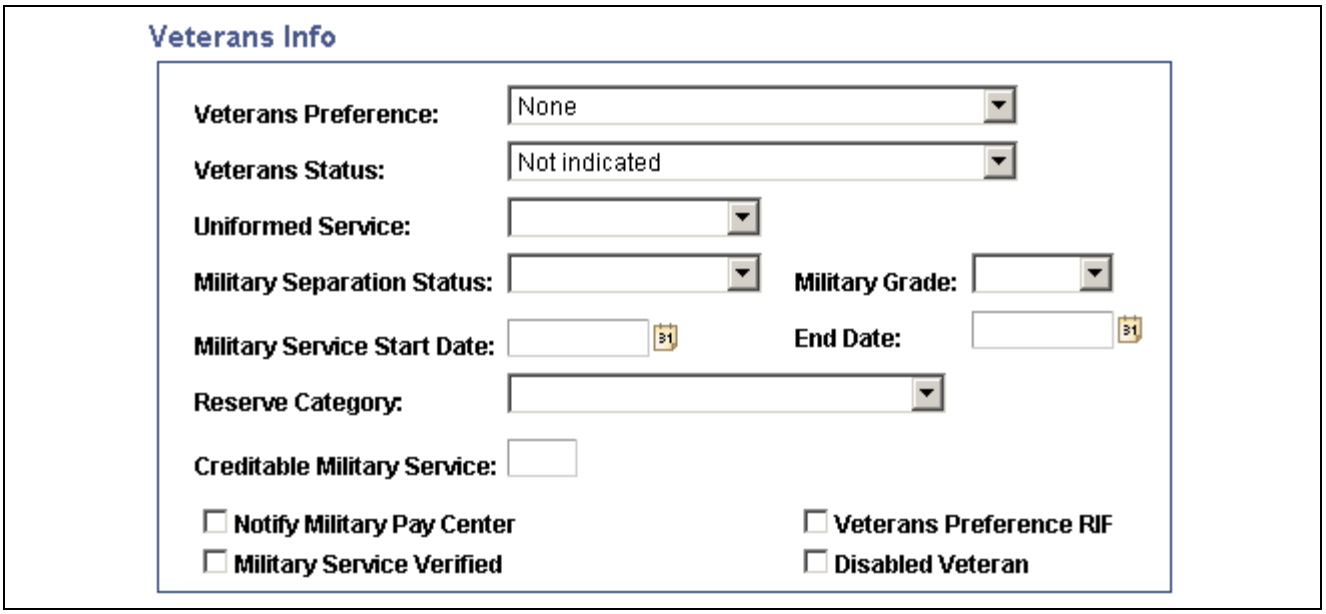
City Code City code of the check mailing address.

Designated Agt (designated agent) Identifies the person designated in the employee's agency to whom the employee's check is mailed. This is prompted from the Designated Agent table.

Entering Veteran Information

Access the Veterans Info page.

Copyright © 1988-2006, Oracle. All rights reserved.



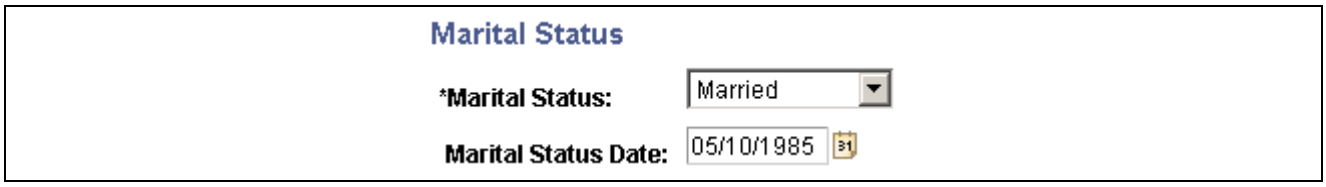
Veterans Info page

Veterans Preference	Select the veteran's hiring preference that applies. For information about preference guidelines refer to the *U.S. Office of Personnel Management's Vets Info Guide.*
Veterans Status	Select the veteran's status.
Uniformed Service	Select the type of uniformed service in which this veteran served.
Military Separation Status	Select the veteran's military separation status.
Military Grade	Select the veteran's military grade.
Military Service Start Date and **End Date**	Enter the veteran's military service start and end dates.
Reserve Category	Select the employee's reserve category, or select *Not Applicable.*
Creditable Military Service	Enter the creditable military service.
Notify Military Pay Center	Select to notify the military pay center.
Veterans Preference RIF (veterans preference reduction in force)	Select to indicate the employee is eligible for veteran's preference in instances of Reductions In Force. See the *U.S. Office of Personnel Management's Vets Info Guide* for more information.
Military Service Verified	Select if you have received verification of service.
Disabled Veteran	Select if the veteran is disabled.

Entering Marital Information

Access the Marital Status page.

Copyright © 1988-2006, Oracle. All rights reserved.



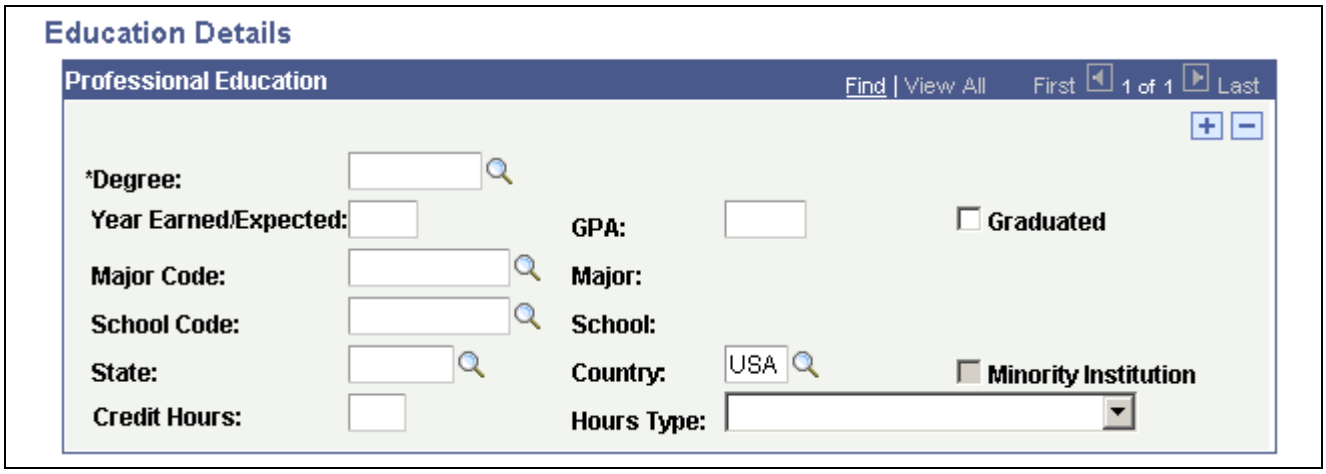
Marital Status page

Marital Status Select the person's marital status.

Marital Status Date Enter the date on which this status took effect.

Entering Education Details

Access the Education Details page.



Education Details page

Note. The Education Details page link is active only during the hiring process. A new profile is created for each new Federal hire when hiring information is saved and in a *PRO* (processed) PAR status. For existing employees, you update education information in the employee's profile.

Degree Select the degree earned or expected for the employee. Degrees are defined in the content catalog that is part of the Manage Profiles business process.

Year Earned/Expected Enter the year the degree was earned or is expected to be earned if the employee has not graduated.

GPA (grade point average) Enter the employee's grade point average from the school.

Graduated Select if the employee has graduated.

Major Code Select the major code for the degree earned or being earned. Define major codes on the Major Table.

Major Enter a major if there is not a code for it.

School Code Select the code designating the school the employee graduated from or currently attends. Define school codes on the School Table page.

School Enter a school if there is not a code for it.

State Enter the state where the school is located.

Copyright © 1988-2006, Oracle. All rights reserved.

Country Select the country where the school is located.

Minority Institution Select if the employee attended or attends a designated minority institution.

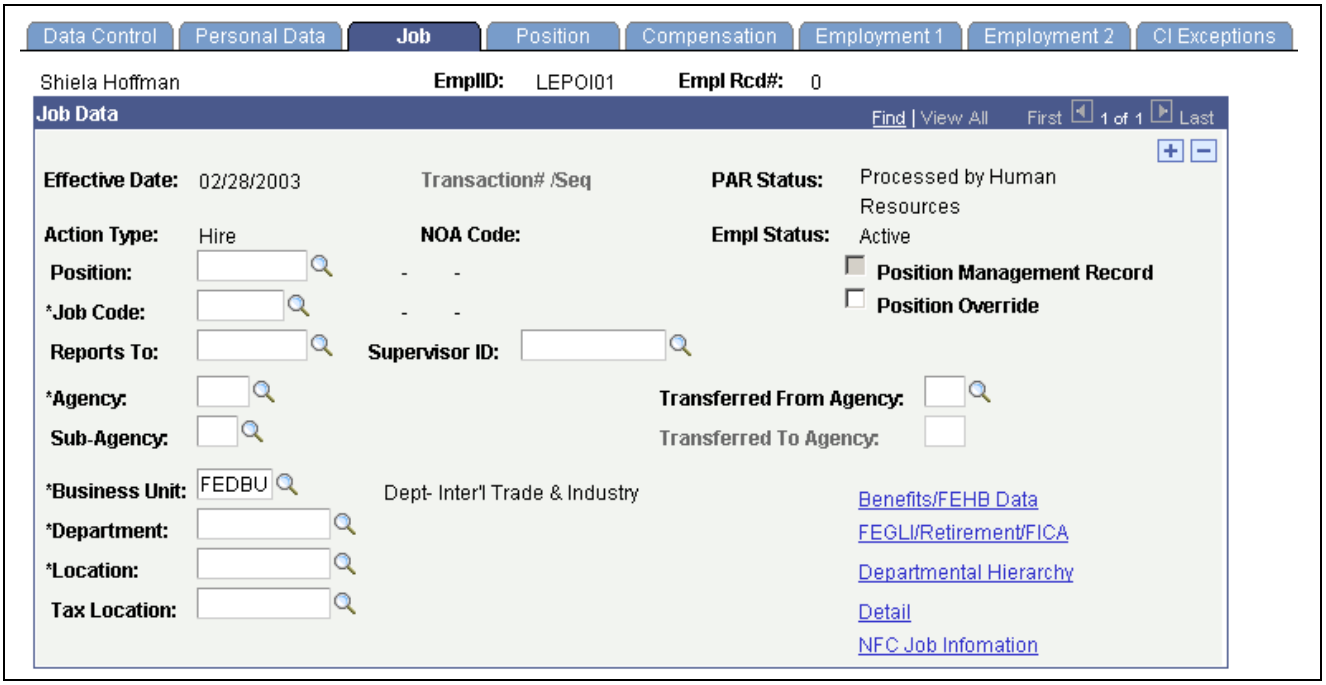
Credit Hours Enter the credit hours earned either upon completion or to this point if not complete.

Hours Type Select the hours type. Values are: *Continuing Education, Other Pay, Quarter Hours,* and *Semester Hours.*

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles*, "Setting Up the Content Catalog".

Entering Job Information

Access the Job page.



Job page

Many values on this page are set by default from values you entered earlier on the Data Control page. If necessary, you can override most of these defaults.

Action Type Set by default depending on the type of employment instance you are creating.

Position Select a position. When you move out of this field, the system completes position-related fields with default data from the Add/Update Position Info component if the Manage Positions business process is being used. Job code, agency, subagency, business unit, department, and location all are set by default to position management data.

In addition, the system inserts a default value in the Supervisor's ID and Reports to Position fields on the Employment 2 page if these are entered when setting up the position.

Copyright © 1988-2006, Oracle. All rights reserved.

If you've associated agencies with departments on the Department page, the system enters the agency code on the Job page and the field is unavailable for entry. It also enters default values on the Position page for the Pay Periods/Year, Employee Type, Holiday Schedule (which you define in the Pay Group table), and Pay Group fields (which you associate with a position in the Add/Update Position Info component in the Organizational Development, Position Management, Maintain Positions/Budgets menu). On the Position page, the system enters the standard hours that correspond to the job code. If you've associated them with the job code on the Job Code page, the system also enters the pay plan/table/grade, and compensation frequency on the Compensation page. In addition, on the Compensation page, the system enters the grade/step entry (date), which is the date the employee was first assigned to the grade and step. The Position Number, Hire Date, and Position Override fields are discussed in Hiring Employees Into Positions.

Position Management Record

Selected by default if updates to the Position Management record exist. For an initial employment instance (for a new hire), the check box is cleared, as the new hire would not have information to update.

If your organization uses the Manage Positions business process and this position were updated, the check box would be selected. The option then would be to select the Position Override check box to make changes to position data that are otherwise locked in by the position data record.

Job Code

If you are not using the Manage Positions business process, enter the job code. Otherwise, the job code is derived from the value established in the Add/Update Position Info component.

Position Override

Select to change any of the position-related fields, such as the Job Code, Department, Agency, and Sub-agency.

PeopleSoft Enterprise Human Resources issues a warning message if you assign an employee to a position that has already been filled by another employee or if a new employee appointment exceeds the maximum head count for that position.

Note. After you have assigned an employee to a position, you must maintain all employee data manually while the employee is assigned to this position in the system. The system won't update position data automatically for the employee when position information is changed.

Agency, Sub-Agency, Business Unit, Department, and **Location**

Select the ID types for these fields individually. If the position management hiring process is used, the system enters default values when the Position ID is selected.

Transferred From Agency

If the reason code entered on the Data Control page was *Transfer,* select the agency from which the employee is transferring.

Note. Not valid for a concurrent assignment.

Transferred To Agency

This is not a valid field in the hiring process. This field is used primarily in other types of PAR requests. It becomes active based on the action and reason code entered on the Data Control page.

Note. Not valid for a concurrent assignment.

Copyright © 1988-2006, Oracle. All rights reserved.

Tax Location Derived from the department-tax location relationship established on the Department page. You can also select the tax location for this person.

See Also

Chapter 18, "(USF) Processing Personnel Action Requests," page 621

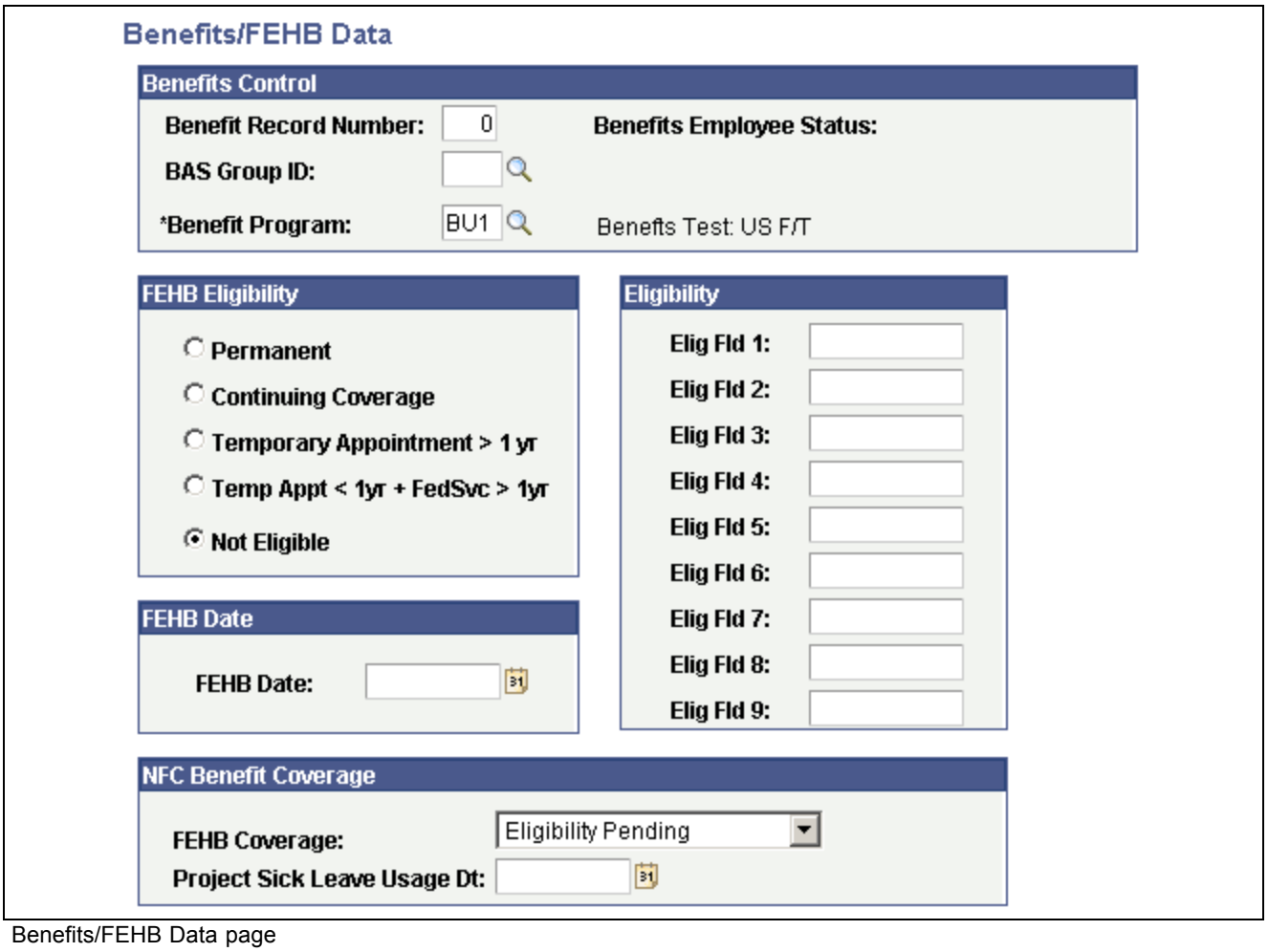
Chapter 2, "Setting Up the Administer Workforce Business Process," Defining Personnel Actions and Reasons, page 5

PeopleSoft Enterprise Payroll Interface 9.0 PeopleBook, "Setting Up Payroll Schedules"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions, "Managing Position Data"

Specifying Benefit Programs

Access the Benefits/FEHB Data page.



Benefits/FEHB Data page

Benefit Record Number Benefit record number is used to group several jobs together for benefit purposes. A benefit record number can be assigned to multiple employee record numbers. If the new job entitles the employee to a new set of concurrent benefits, you should use a new benefit record number. If the job does not entitle the employee to new benefits, you should use an existing benefit record

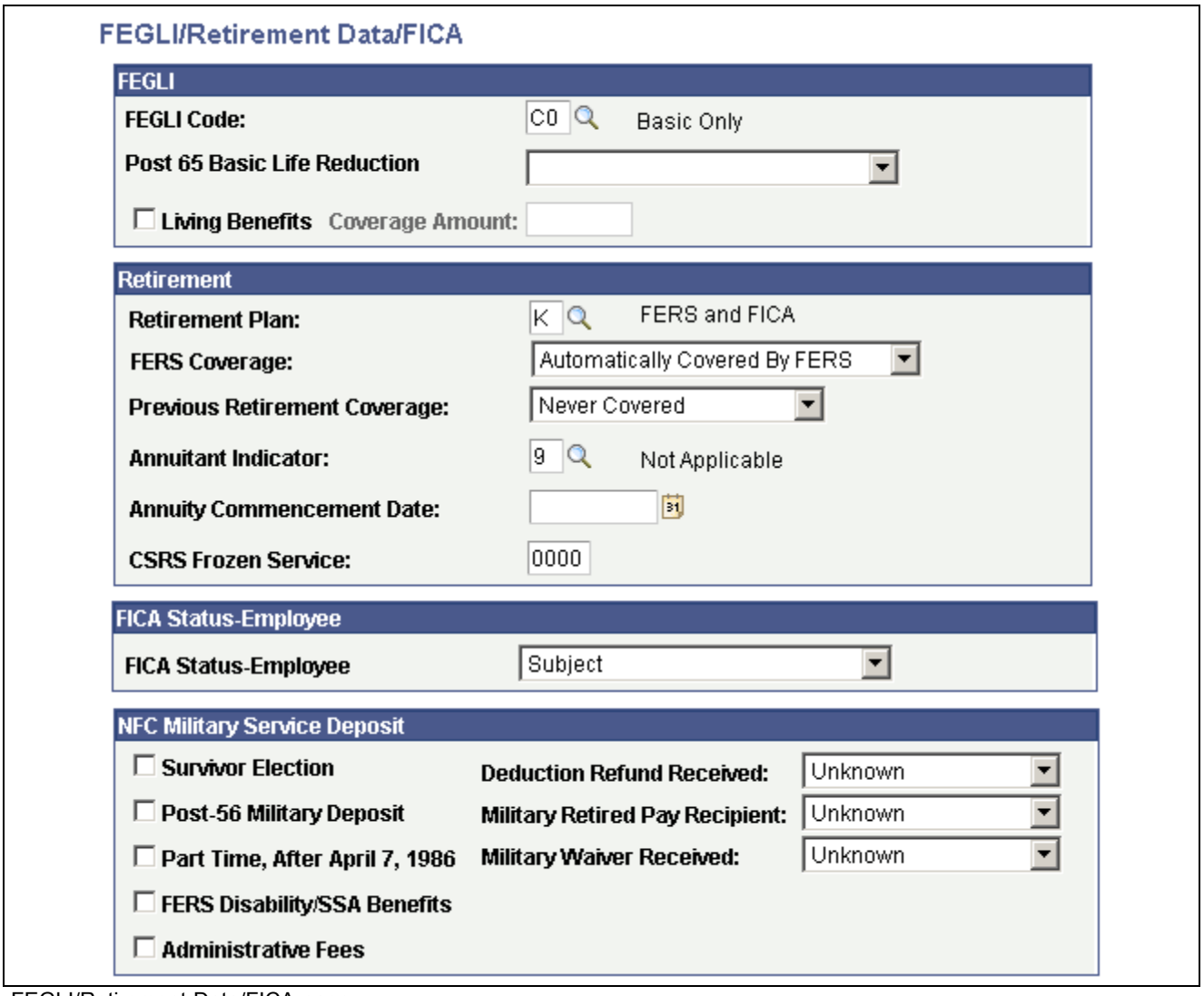
Copyright © 1988-2006, Oracle. All rights reserved.

	number. Each benefit record number must have a designated primary job. The primary job is used to process the benefit information.
BAS Group ID (benefits administration system group ID)	(Optional) Enter a BAS group ID.
Benefit Program	Enter a benefit program. This is a required field for all PAR transactions.
FEHB Eligibility (federal employees health benefits eligibility)	Select the appropriate option to indicate the FEHB eligibility. If you select *Not Eligible,* the FEHB Date field becomes available for entry. This typically applies to temporary employees.
FEHB Date (federal employees health benefits date)	Enter the date that the employee is eligible for FEHB.
Elig Fld 1–9 (eligibility field 1–9)	These fields further define an employee's benefits eligibility. Each agency determines its own use of these fields. Contact the agency's Personnel Policy Officials for instruction using these fields.
FEHB Coverage	NFC health benefits enrollment status. Valid entries include: *Enrolled, Ineligible, Waived, Elig Pending, Cancelled, Court Order-Enrolled, Court Order-Elig Pending, Court Order-Self Only - Pend*. The default value for new hires is *Eligible Pending*.
Project Sick Leave Usage Dt (Projected Sick Leave Usage Date)	Records the NFC-computed date through which unused sick leave would have carried the employee, if the sick leave had been used. This date is entered only for retirement, death and preliminary disability actions. It is used only for part time employees with uncommon tours of duty and for employees whose tours were changed from part time to full time within 180 days of the effective date of the personnel action.

Entering Retirement Data

Access the FEGLI/Retirement/FICA page.

Copyright © 1988-2006, Oracle. All rights reserved.



FEGLI/Retirement Data/FICA page

FEGLI

FEGLI Code (federal employees group life insurance code)

Enter the FEGLI code.

Post 65 Basic Life Reduction

Select the employee's post-65 basic life reduction coverage.

Living Benefits and **Coverage Amount**

Use these fields only when selecting living benefits (not during the hiring process).

Retirement

Retirement Plan

Select the employee's retirement plan.

In addition to the retirement plans used for submission to Central Personnel Data File (CPDF), PeopleSoft supplies the following codes that you may use for documentation purposes only:

Copyright © 1988-2006, Oracle. All rights reserved.

Code	Explanation
7	For foreign national employees exempt from retirement and from social security and Medicare tax deductions.
8	U.S. Court of Veterans Appeals without election of survivor annuity benefits. Code is for use by the judges of the U.S. Court of Veterans Appeals only.
9	U.S. Court of Veterans Appeals with election of survivor annuity benefits. Code is for use by the judges of the U.S. Court of Veterans Appeals only.
A	Article III judges and justices.
B	Bankruptcy judges and justices under the Judicial Retirement System.
S	U.S. Claims Court Judges Retirement System.
V	Clerks/magistrates (CSRS).
U	Bankruptcy judges (full FICA/partial CSRS).
Y	Bankruptcy judges (full FICA/full CSRS).

FERS Coverage (Federal Employees Retirement System coverage) Select the employee's FERS coverage.

Previous Retirement Coverage Select the employee's previous retirement coverage.

Annuitant Indicator Select the employee's annuitant indicator.

Annuity Commencement Date If a new employee is a reemployed annuitant, enter the annuity commencement date.

CSRS Frozen Service (Civil Service Retirement System frozen service) Enter the total years and months of civilian and military service that is creditable in a CSRS component of a FERS employee, or, in the case of a CSRS offset employee, the service that would be included in a CSRS component if the employee ever becomes covered by FERS.

FICA Status-Employee

FICA Status-Employee Indicate whether the employee is exempt, subject, or subject to Medicare only.

NFC Military Service Deposit

Survivor Election Indicates if the employee elected the survivor option.

Copyright © 1988-2006, Oracle. All rights reserved.

Post-56 Military Deposit	Indicates if the employee paid post-1956 military deposit.
Part Time, After April 7, 1986	Indicates if the employee has any part-time service after April 7, 1986.
FERS Disability/SSA Benefits	Indicates if a FERS employee applying for disability retirement has also applied for social security benefits.
Administrative Fees	Indicates if the agency has to pay OPM a 9-percent or 15-percent administrative fee.
Deduction Refund Received	Indicates if the employee is receiving retirement payments based on military service.
Military Retired Pay Recipient	Indicates if the employee previously received a retirement refund.
Military Waiver Received	Indicates a military waiver was received declining military pay.

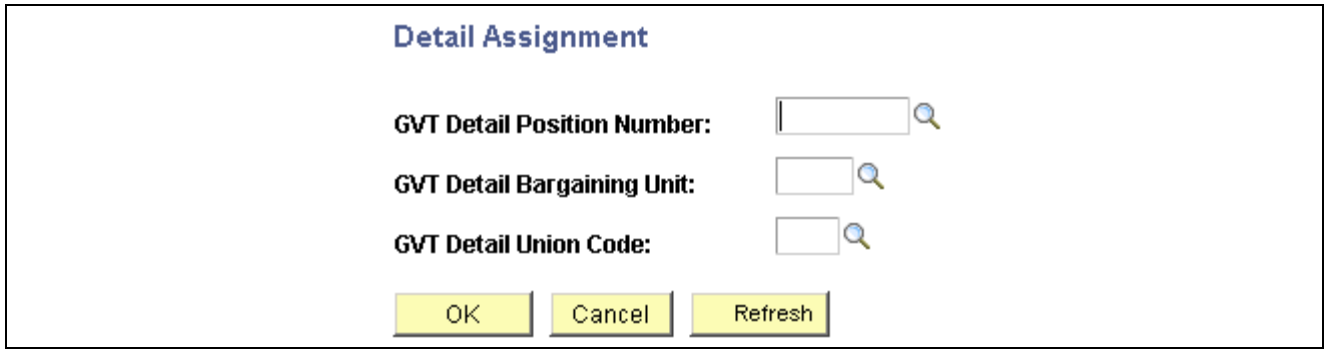
See Also

Chapter 18, "(USF) Processing Personnel Action Requests," Requesting Terminations Due to Death, page 634

PeopleSoft Human Resources 9.0 PeopleBook: Manage Base Benefits

Tracking Information for Employees on Assignment

Access the Detail Assignment page.



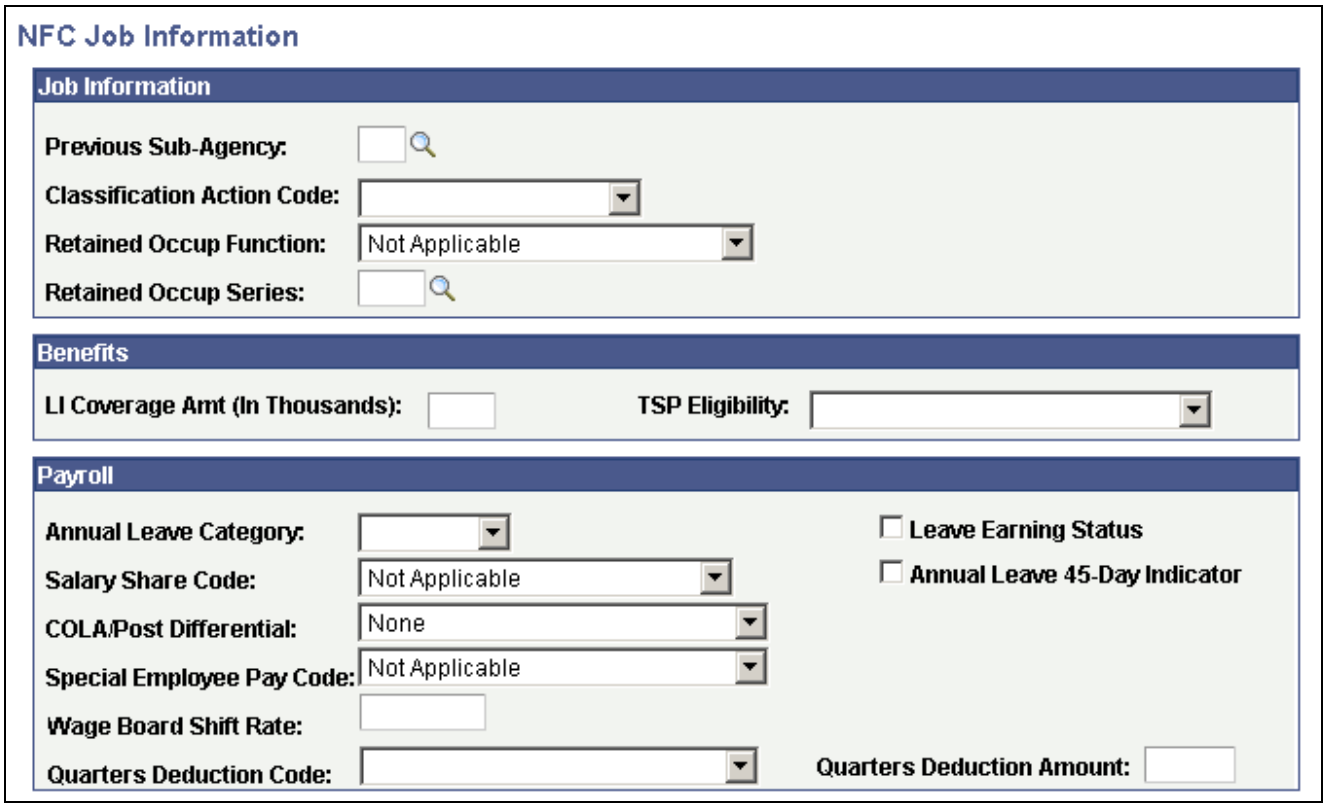
Detail Assignment page

GVT Detail Position Number (government detail position number)	Select the employee's detail position number.
GVT Detail Bargaining Unit (government detail bargaining unit)	Select the employee's detail bargaining unit.
GVT Detail Union Code (government detail union code)	Select the employee's detail union code.

Entering NFC Job Information

Access the NFC Job Information page.

Copyright © 1988-2006, Oracle. All rights reserved.



NFC Job Information page

Job Information

Previous Sub-Agency Enter the previous sub-agency when the employee moves to another sub-agency within the same Department.

Classification Action Code Provides a method for processing a classification and personnel action at the same time. Used for reassignments, promotions or change to a lower grade.

Retained Occup Function (retained occupational functional classification) Records the occupational functional classification corresponding to an employee's retained occupational series. This field is required only if the series specified as the retained occupational series is one for which OPM requires an occupational functional classification.

Retained Occup Series (retained occupational series) Records the occupational series on which an employee's salary is to be based when that series is not the series of the position the employee held immediately before being placed on grade retention. This would occur, for example, when an employee was returned to an unexpired period of grade retention at the end of a temporary promotion.

Benefits

LI Coverage Amt (In Thousands) (life insurance coverage amount (in thousands) The amount of basic life insurance coverage for an employee who is covered under the Federal Employees Group Life Insurance (FEGLI) plan. Complete this field only if one or more of the following conditions are met:

- The employee works at such different rates of pay that the payroll/personnel system is unable to calculate or project the rates of pay on an annual basis.
- The employee is paid on a piecework basis.

Copyright © 1988-2006, Oracle. All rights reserved.

- The employee is paid at different rates of pay during the year.

TSP Eligibility Specify the type of eligibility for the employee to participate in the Federal Thrift Savings Plan (TSP) for FERS, CSRS, or Offset employees.

Payroll

Annual Leave Category Select the code that identifies the annual leave earning status in the NFC payroll system. If the employee is eligible to earn annual leave, the code represents the appropriate earning category.

Leave Earning Status Select the check box to identify employees who are entitled to leave accruals for the first and last pay period of employment in the NFC payroll system.

Salary Share Code Identifies the source, in addition to the the agency, that contributes to paying the employee's salary.

Annual Leave 45-Day Indicator Select the check box to identify employees who are stationed at an overseas foreign post of duty and are entitled to carry forward from one leave year to another a maximum annual leave accumulation of 45 days.

COLA/Post Differential Select the option that identifies the type of cost of living allowance (COLA) or post differential, in addition to the base salary, that the employee is entitled to receive.

Special Employee Pay Code Identifies the employee as belonging to a special category of pay processing not accommodated in any other part of the NFC payroll/personnel system. This code enables certain operations to be performed which would not otherwise be applicable to this type of employee.

Wage Board Shift Rate Enter the rate that NFC uses to compute pay for the varied shift time reported on the T&A for wage system employees.

Quarters Deduction Code Select the code to identify the type of quarters deduction for the employee.

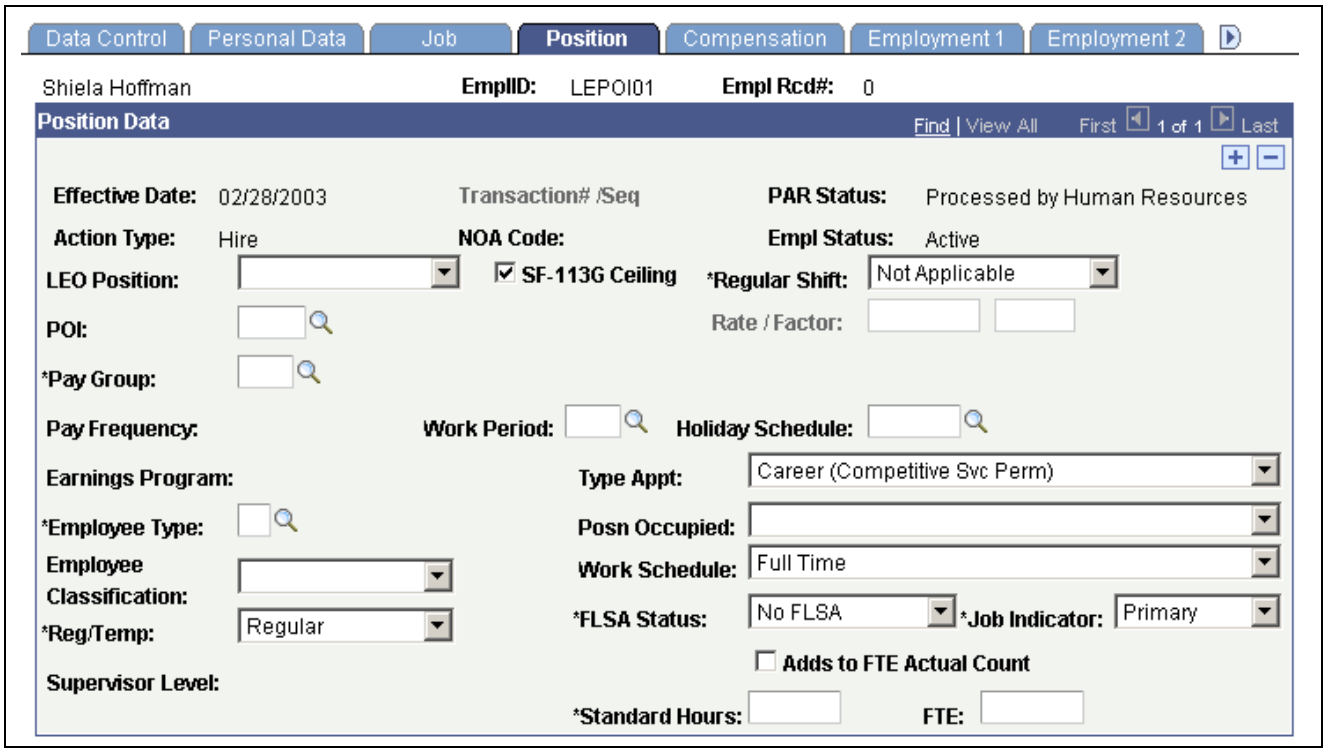
Quarters Deduction Amount The monetary amount that is to be deducted through NFC payroll, either per day or per pay period, from the salary of an employee who is being furnished quarters, utilities, or other in kind allowances.

Note. The information entered on this page is for NFC reporting purposes only. Benefit or payroll information that is entered on this page is *not* integrated with PeopleSoft Enterprise benefit or payroll applications.

Entering Position Information

Access the Position page.

Copyright © 1988-2006, Oracle. All rights reserved.



Position page

LEO Position (law enforcement officer position) — If this is a law enforcement officer position, a value appears from the Job Code page.

SF-113G Ceiling — If this position is reportable for the SF-113G ceiling, select this check box.

POI (personnel office identifier) — Set by default from the Add/Update Position Info component or the Job Code page.

Regular Shift — If the employee is working shifts, select the appropriate shift.

Shift Rate/Factor — Define the shift rate/factor only if the shift differential is specified at the employee level.

Pay Group — (Required) A value appears here if you defined one on the Position Data page. Otherwise, select a pay group.

Pay Frequency — Set by default from the Pay Group page.

Work Period — Select the time period in which employees must complete the standard hours. The system uses the annualization factor of the standard work period, in combination with the standard hours, to calculate FTE (full-time equivalency).

Holiday Schedule — If you linked an established holiday schedule on the Pay Group page, it appears here.

Employee Type — Depends on the pay group and is set by default from the Pay Group page. If an employee type doesn't exist for this pay group, establish one on the Pay Group page or enter one here.

Employee Classification — Provides another method of grouping employees.

Copyright © 1988-2006, Oracle. All rights reserved.

Reg/Temp (regular/temporary)	Indicate whether the new hire is a regular or temporary employee. The Manage Base Benefits business process of PeopleSoft Enterprise Human Resources uses this value when determining eligibility requirements.
Supervisor Level	If the employee is in a supervisory position, this value is set by default from the Position Data page.
Type Appt (type of appointment)	Enter the employee's type of appointment, such as *Career* (Competitive Service Permanent), *Limited, Executive,* or *Schedule A - C.*
Posn Occupied (position occupied)	This field identifies the type of appointment which can occupy the position. Values are *Competitive, Excepted Senior Executive Service (SES) Career Reserved* and *SES General.* This is a CPDF reported field.
Work Schedule	Set by default from the Add/Update Position Info – Description page.
FLSA Status (Fair Labor Standards Act status)	Set by default from the position data on the Job Code page.
Adds to FTE Actual Count (adds to the full-time equivalency actual count)	Select to include this employee's job when processing FTE edits for budgeting purposes.
Standard Hours	The field is populated by default with the standard hours for the agency as specified in the Installation tables. You can change this information manually.
FTE (full-time equivalency)	The percentage of full-time the employee should normally work in this job. The system calculates this value based on the standard hours entry for this job and the standard work period. However, you can override the system-calculated FTE and enter a new value less than 1.0.

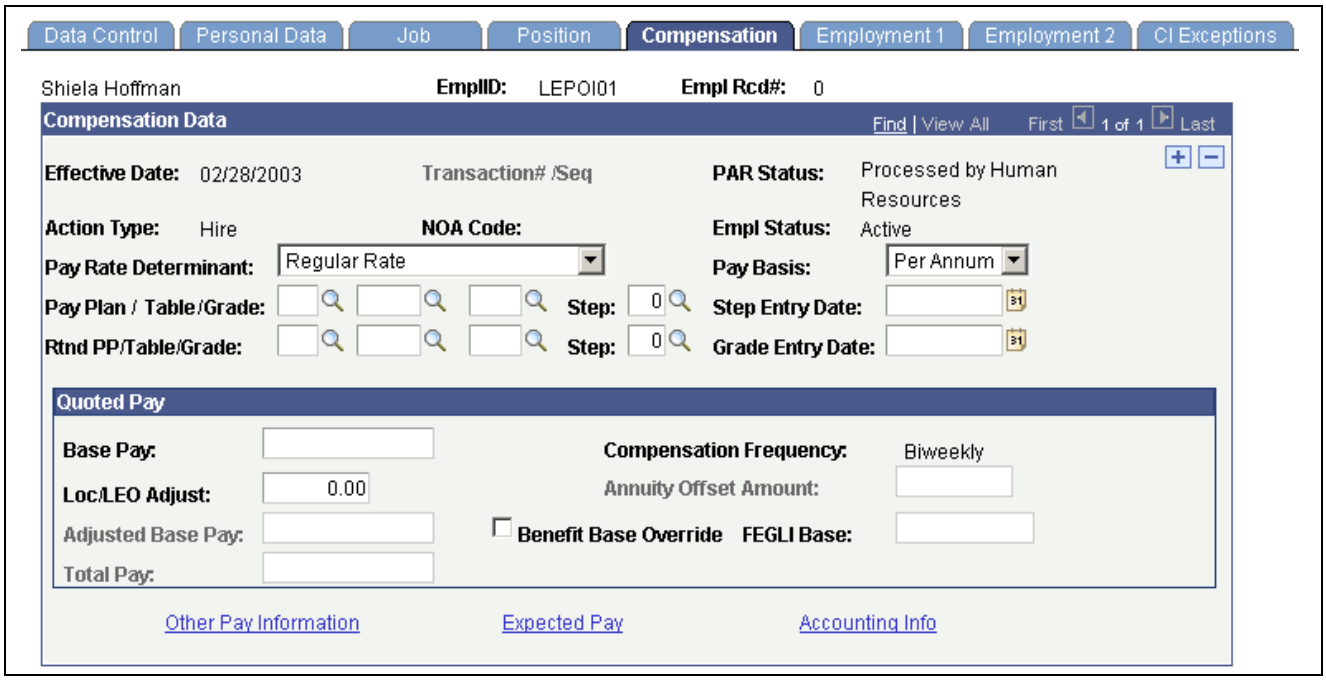
See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Working with Frequencies"

Entering Employee Compensation Information

Access the Compensation page.

Copyright © 1988-2006, Oracle. All rights reserved.



Compensation page

Note. Multiple Components of Pay, Derivation of Rates, and related features are not currently supported by PeopleSoft Enterprise Human Resources USF functionality.

Many values on this page are set by default from values you entered in the Department and Job Code fields on the Job page. Override these values if necessary.

Pay Rate Determinant Select a pay rate determinant.

Pay Plan/Table/Grade Select the pay plan, table, and grade.

Step Assign the correct step for the employee.

Note. For certain Pay Rate Determinants this is not an option and the field does not accept data.

Step Entry Date The effective date of the request for this action.

If the Multi-Step/Grade check box is selected on the Installation table and you select a step on this page, the system automatically enters the base pay for that step.

Rtnd PP/Table/Grade (retained pay plan/table/grade) There are several instances where retained grade or pay is authorized based on prior federal experience within the employing agency or at another federal agency. After selecting the appropriate pay rate determinant (for example, Retained Grade-Diff Posn), you can enter information in this field.

Step and **Grade Entry Date** Enter the step and the date the employee was first assigned to the grade and step.

Base Pay If you are using partial or full position management, a value is set by default here based on your prior assignment in the Step field.

Copyright © 1988-2006, Oracle. All rights reserved.

	A GM pay plan position is the exception to this rule. Because the GM pay plan has no steps, you must enter the base pay amount. If you selected the Position Override check box on the Job page, you may also enter a base pay amount for a position with steps. This is appropriate in cases where the base pay amount is beyond the step 10 level. Enter the base pay amount based on the compensation frequency period indicated. For example, if the frequency period is one month, the base pay entered would be the pay earned for one month. The system calculates and displays the value in the Loc/LEO Adjustment (if appropriate) and Total Pay fields after you have provided the compensation data.
Adjusted Base Pay	The system calculates and displays the adjusted base pay by applying the Loc/LEO adjustments to the employee's base pay. This field is used for pay limits computation of the locality pay.
Compensation Frequency	Set by default from the Job Code page; override if necessary.
Annuity Offset Amount	If the employee is an annuitant, enter a CSRS annuity offset amount.
FEGLI Base	The system calculates the FEGLI base rate. Select the Benefit Base Override check box to override this default and then enter a new amount.
Other Pay Information	Click to access the Other Pay Information page and enter compensation that employees receive that's in addition to base pay.
Expected Pay	Click to access the Expected Pay page and view the various pay rate and compensation calculations the system calculates and displays based on the base pay and compensation frequency that you enter on this page.
Accounting Info	Click to access the Accounting Information page and view a summary of the employee's job earnings distribution.

If you selected the Multi-currency check box on the Installation table and entered the base pay in a different currency from your base currency, the system converts the rates to the base currency and compares them with the ranges specified for this salary grade in the Salary Grade table. If the rates exceed the salary range, a warning message appears.

Default Values for Employment Data

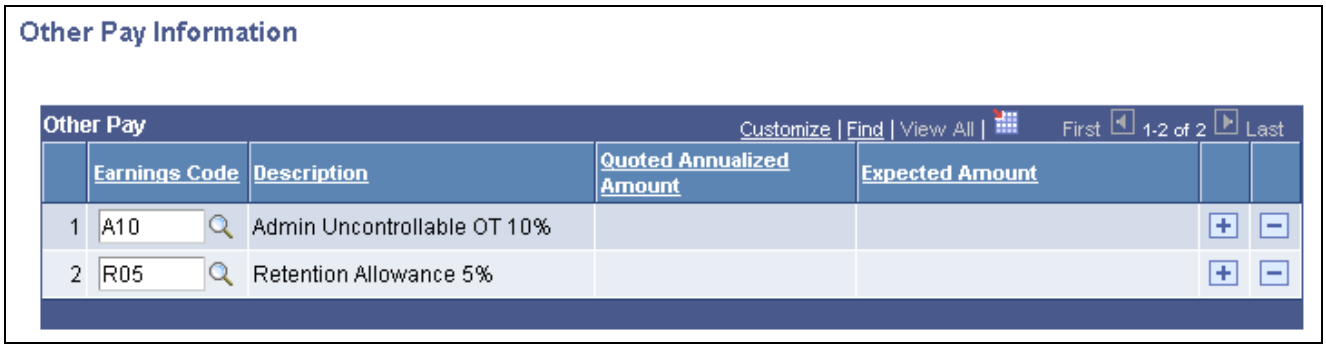
After you enter job and position data, pay information is populated by default on the Compensation page. If you associated pay plans with job codes, the Pay Plan field is populated by default from the data in the Job Code table. The Grade field is populated by default from the Job Code page. After the values in the Pay Plan and Grade fields appear, the system also displays the Grade Entry Date field, which is the date the employee first joined the grade. When a value is entered in the Step field, the value in the Step Entry Date field populates by default. You can override these values if you choose.

The system verifies any combinations of pay plans and grades that you select. If the combination doesn't exist, a warning message appears.

Entering Additional Compensation Information

Access the Other Pay Information page.

Copyright © 1988-2006, Oracle. All rights reserved.



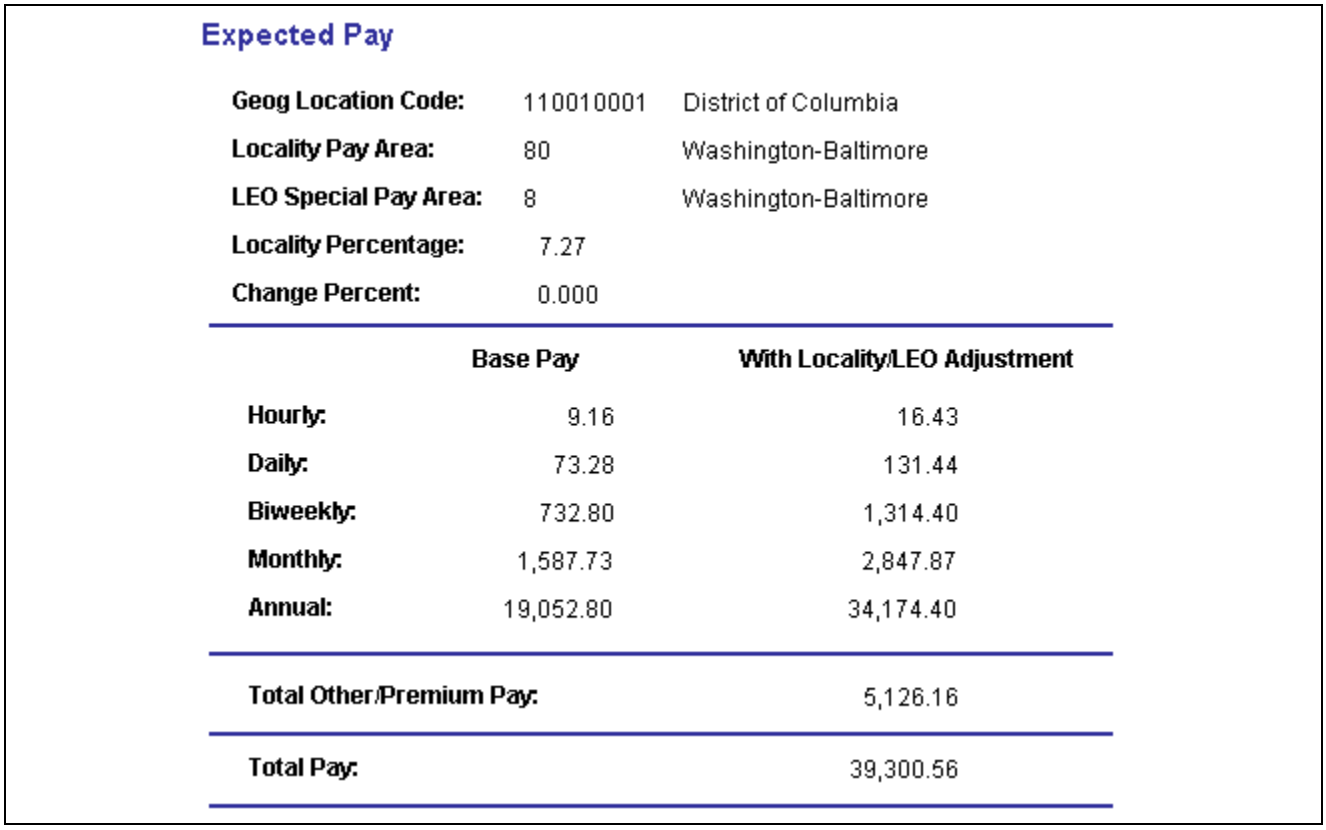
Other Pay Information page

Earnings Code Select the code for the additional pay type, such as automobile and beeper allowances. The system issues a warning indicating that the earnings code may be applicable to pay limits, at which time the employee's earnings calculation within payroll may be reduced.

Note. A message appears when you enter premium pay that is subject to a pay limit. During payroll calculation, if the premium earnings plus adjusted base pay exceed the pay limit, the premium pay is reduced.

Viewing Pay Rate and Compensation Calculations

Access the Expected Pay page.



Expected Pay page

Change Percent Displays information regarding a percent change when new rows are inserted that change the base salary amounts.

Copyright © 1988-2006, Oracle. All rights reserved.

Base Pay	Based on the base pay and compensation frequency you enter, the system calculates and displays the hourly, daily, biweekly, monthly, and annual rates for this employee.
With Locality/LEO Adjustment	The system calculates the same base pay figures using the locality/LEO adjustment listed at the top of the page.
Total Other/Premium Pay	The total of annual expected pay for the items you entered on the Other Pay Information page.
Total Pay	The system calculates total pay by summing the annual pay with the locality/LEO adjustment and the total other/premium pay contributions.

Note. The Rate Change Amount and Rate Change Percent fields are used when awarding increases (not for new hires).

If expected pay exceeds the pay cap, a message appears at the bottom of the page warning that the pay cap has been reached and pay was reduced.

Note. In the case of an employee that is subject to reaching a pay cap/limit, the compensation rate is displayed correctly, however, the change amount and change percent are displayed differently depending on whether you view this information on the USF Compensation Data – Expected Pay page or on the commercial compensation pages.

Understanding Expected Pay and Quoted Pay Within PeopleSoft Human Resources Management for U.S. Federal Government

The difference between expected pay and quoted pay occurs as a result of the conversion factors used when comparing yearly and hourly pay rates on the Pay Plan page in the Pay Plan Table component and the Expected Pay Rate page.

Rather than using the hourly conversion factor of 2080, as is often used as a business calculation factor, the U.S. federal government uses 2087.

The Expected Pay page calculates the daily, biweekly, monthly, and annual rates using the base pay amount from the Compensation page. These figures are based on the hourly conversion factor you set for the pay plan on the Pay Plan table, typically 2087.

It also breaks out into separate columns the pay into base pay (no locality, no adjustments), pay with locality, and LEO pay. Total other/premium pay is also calculated based on the amounts entered on the Other Pay Information page. So, as a result of using 2087 in these calculations, the estimated quoted pay on the Compensation page is slightly higher than what the federal employee actually receives in a year.

These two fields for expected and quoted pay may not match. The procedures that the federal government has for deannualizing and reannualizing quoted compensation rates are the cause of the difference. To deannualize a quoted rate of pay (convert to hourly), you divide the quoted rate of pay by 2087. To reannualize a quoted rate of pay to determine the expected pay, you multiply the derived hourly rate by the employee's scheduled weekly tour of duty and then multiply that by 52 weeks.

Following are two examples:

Example 1

Full-time employee (40 hours per week) with quoted rate of 41,740 USD per year.

Quoted rate = 41,740 USD.

Copyright © 1988-2006, Oracle. All rights reserved.

Hourly rate = quoted rate/2087 hours = 41,740 USD/2087 hours = 20 USD/hour.

Expected pay = hourly rate × standard weekly tour × 52 weeks = 20 USD/hour × 40 hours/week × 52 weeks = 41,600 USD.

Difference between quoted and expected pay on an annual basis = 140 USD.

Example 2

Part-time Employee (20 hours per week) with quoted rate of 41,740 USD per year

Quoted rate = 41,740 USD.

Hourly rate = quoted rate/2087 hours = 41,740 USD/2087 hours = 20 USD/hour.

Expected pay = hourly rate × standard weekly tour × 52 Weeks = 20 USD/hour × 20 hours/week × 52 weeks = 20,800 USD.

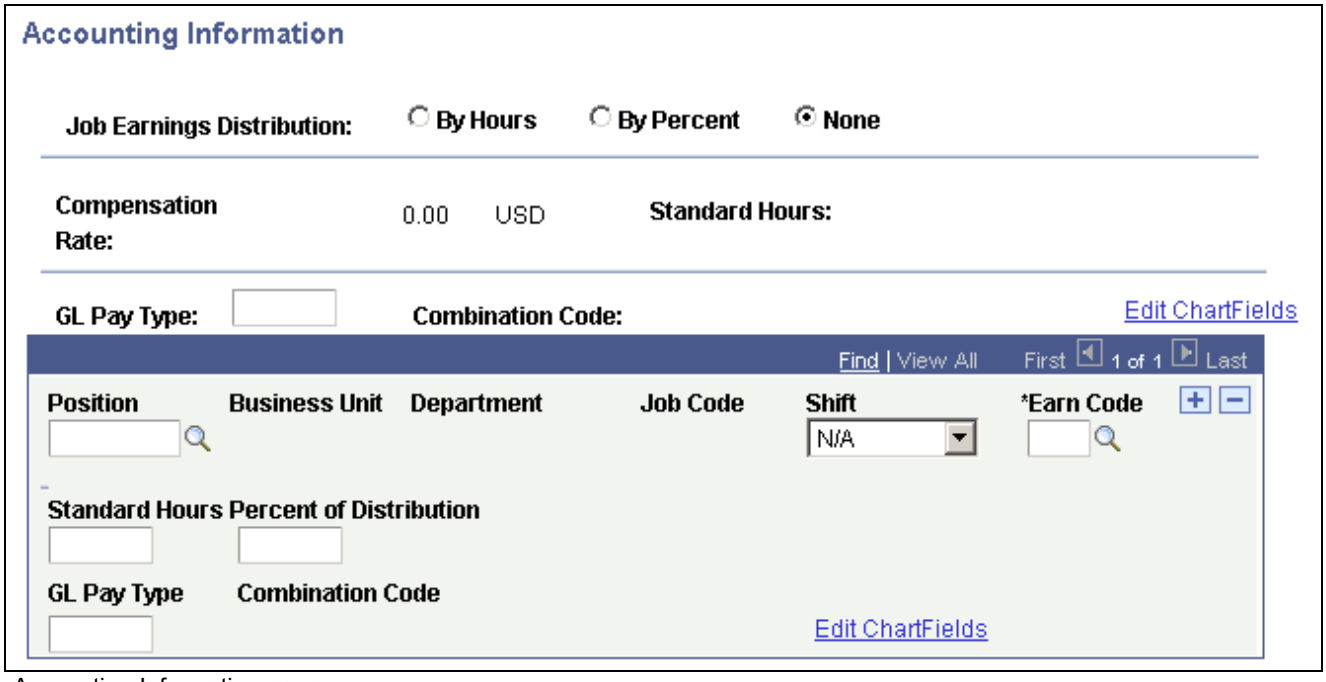
Difference between quoted and expected pay on an annual basis = 20,940 USD.

See Also

Chapter 18, "(USF) Processing Personnel Action Requests," page 621

Viewing Job Earnings Distributions

Access the Accounting Information page.



Accounting Information page

Job Earnings Distribution Select the appropriate option to indicate the job earnings distribution frequency: by hours, by percent, or not at all.

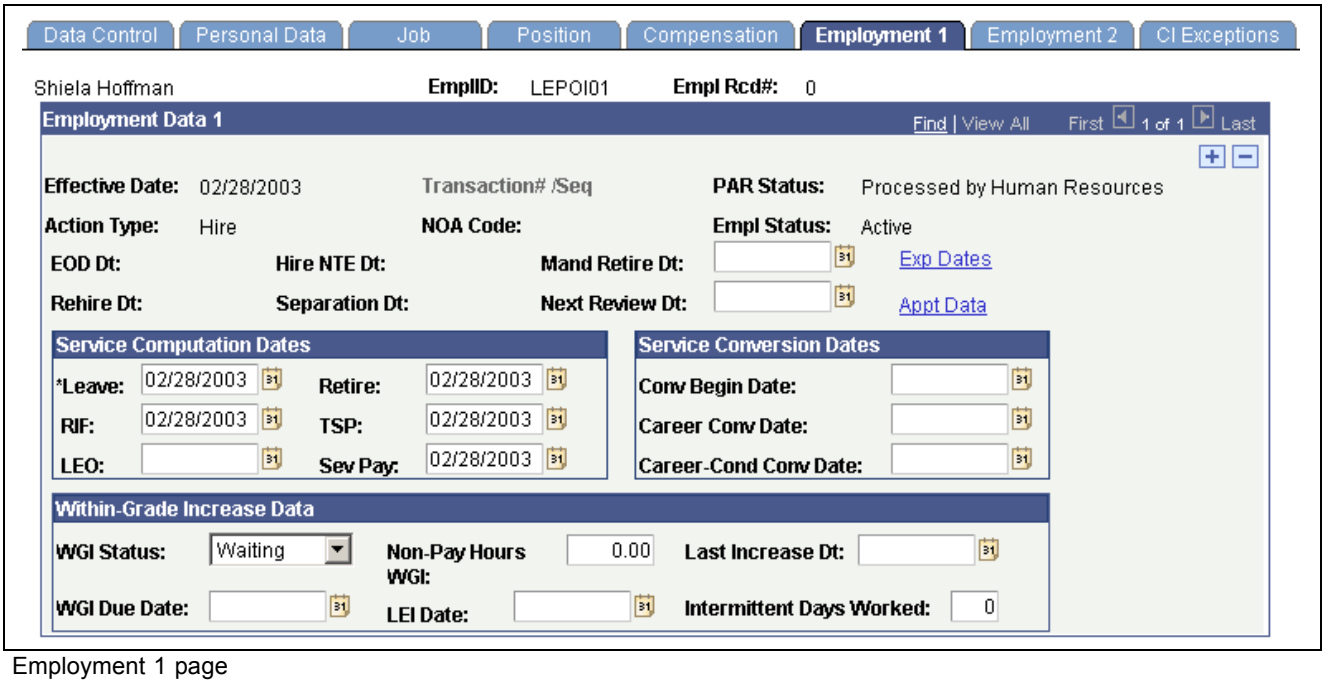
When you select the By Hours or By Percent options, the GL Pay Type and Account Code fields are unavailable for entry. Use the scroll bar to distribute earnings among departments.

Copyright © 1988-2006, Oracle. All rights reserved.

	If you select the By Hours option, then enter the hours to be distributed to each department in the Standard Hours field corresponding to each department entered. If you select the By Percent option, enter a percentage corresponding to each department in the Percent of Distribution field. Percentages must total 100 percent and must equal the value in the Standard Hours field.
Compensation Rate	The annual salary, including the locality and LEO adjustments.
Standard Hours	Set by default from the Job Code page.
GL Pay Type (general ledger pay type)	Enter the GL pay type that has been established by your agency.
Account Code	Indicate the type of account to which the earnings will be charged.
Business Unit, Department, Job Code, Position, and **Shift**	Select the business unit, department, job code, position, and shift to which to charge the earnings.
Earn Code (earnings code)	Specify the earnings code. This will default to the Regular Earnings code defined on the Paygroup Table.
Hours	If you select the By Hours option, then specify how many hours will be charged to the corresponding earnings code.
Percent of Distribution	If you select the By Percent option, enter the percent to be charged to the corresponding earnings code.

Entering Current and Historical Employment Information

Access the Employment 1 page.



Employment 1 page

Copyright © 1988-2006, Oracle. All rights reserved.

Many values on this page are set by default from values entered in the Department and Job Code fields on the Job page. When adding an employment instance, the system populates most of the dates on this page with the effective date of the action. These dates are used later in various ways to calculate the employee's service time. Override these values as necessary.

If at a later date you change the status of an employee's employment, depending on the administrative action you select in the Job Data pages, the system will display the rehire date.

The Separation Date field is display-only, and shows the date that the employee left employment.

EOD Dt (entered on duty)	Reflects the effective date of the hire request after you save the request. This date is distinct from the SCD dates in that it describes when the employee started federal employment with the employing agency; it does not reflect total federal service involving the employee's total career.
Hire NTE Dt (hire not to exceed date)	Set by default from the Not to Exceed Date field on the Data Control page. In the case of a temporary hire, it designates the length of time the temporary employment can last.
Mand Retire Date (mandatory retirement date)	If applicable, enter the employee's mandatory retirement date.
Exp Dates (expiration dates)	Click to access the Expiration Dates page and enter expiration dates for temporary promotions, position changes, sabbaticals, or detail assignments.
Next Review Dt (next review date)	Enter the next review date. This date, while informational only, can serve as a tickler date for employee performance review.
Appt Data (appointment data)	Click to access the Appointment Info page and enter appointment limits.

Service Computation Dates

Leave	Enter the service computation date for beginning the employee's leave computation.
Retire	Enter the service computation date for beginning the employee's retirement computation.
RIF (reduction in force)	Enter the computation date for establishing the employee's RIF position.
TSP (thrift savings plan)	Enter the computation date for beginning the employee's thrift savings plan eligibility computation.
LEO (law enforcement officer)	Enter the computation date for beginning the employee's law enforcement officer retirement computation.
Sev Pay (severance pay)	Enter the service computation date for establishing the employee's severance pay computation.

Copyright © 1988-2006, Oracle. All rights reserved.

Service Conversion Dates

Conv Begin Date (conversion begin date), **Career Conv Date** (career conversion date), and **Career Cond Conv Date** (career-conditional conversion date)

Enter the conversion begin date, the career conversion date, and the career-conditional conversion date. If the employee is hired using a career-conditional appointment, the conversion begin date is the effective date of the hire. Upon completion of the three-year period, the personnel office processes a PAR converting the employee to a career appointment and enters that effective date in the Career Conv Date field. If the employee was hired under a temporary appointment, the conversion begin date is the effective date of the hire. When the personnel office processes a PAR to convert the temporary employee to a permanent employee with a conversion to career conditional competitive appointment, the Career-Cond Conv Dt field is the effective date for that transaction.

Within-Grade Increase Data

WGI Status (within-grade increase status)

Enter the WGI status, such as *(none), Approved, Waiting, Denied, N/A,* or *Postponed.* For a new employee, the default value is *Waiting. Created* is an option for WGI status, which is reserved for the automatic WGI process. Do not change this online, as the WGI process won't select it unless the status is *Waiting* or *Approved.*

Non Pay Hours WGI and **Intermittent Days Worked**

Leave these informational fields blank at hire. After running the WGI/Tenure Update process for leave without pay and processing a PAR, update the Non Pay Hours WGI field with nonpay hours from the WGI/Tenure Update report.

Note. The WGI/Tenure Update process is a North American Payroll process specific to U.S. Federal government customers.

Last Increase Dt (last increase date), **WGI Due Date,** and **LEI Date** (last equivalent increase date)

The system automatically enters the last increase date, LEI date, and WGI due date. For certain actions, the WGI Due Date field is set by default to the pay period begin date based on the pay calendar tables that your organization has established. For WGI due date calculation, it is imperative that you set up your pay calendars for this year, plus three years in advance of the current year. For example, if the current year is 1999, then your pay calendars need to be set up for 1999, 2000, 2001, and 2002.

If you enter a date that isn't the beginning of a pay calendar, the system displays a message suggesting valid pay calendar begin dates into which your date falls. If the system suggests a date of January 1, 1899, this indicates that your pay calendars do not exist. See your implementation project manager about creating additional pay calendars.

After running the WGI/Tenure Update process for leave without pay and processing a PAR, update the WGI Due Date field with the extended due date from the WGI/Tenure Update report.

See Also

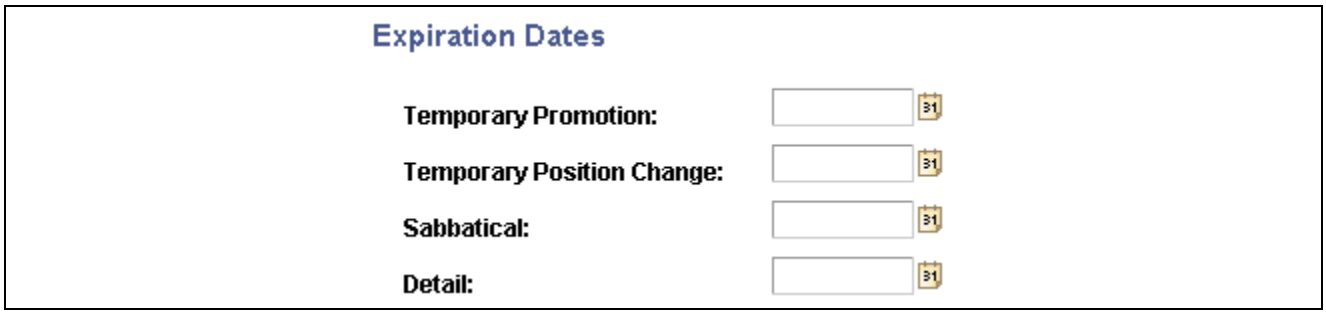
Chapter 19, "(USF) Processing Automatic Actions for Probation, Tenure, and WGIs," page 637

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up Pay Calendars"

Copyright © 1988-2006, Oracle. All rights reserved.

Entering Expiration Dates

Access the Expiration Dates page.



Expiration Dates page

The following fields, which are updated by the user, are informational only.

Temporary Promotion Enter the temporary promotion date.

Temporary Position Change Enter the temporary position change expiration date.

Sabbatical Enter the sabbatical expiration date.

Detail Enter the detail assignment expiration date.

Entering Appointment Limits

Access the Appointment Info page.



Appointment Info page

Copyright © 1988-2006, Oracle. All rights reserved.

Nature of Action Code, Current Appointment Auth #1 (current appointment authorize #1), and **Current Appointment Auth #2** (current appointment authorize #2)

CPDF reportable fields maintained to reflect historic data on the employee's current appointment authority used to authorize the employee's hire.

Benefit Record Number and **Severance Pay Previous Weeks**

For a new hire, you do not need to enter the benefit record number and the number of severance pay previous weeks. If changes occur to the employee's employment status, you must update these fields (for example, RIF).

Special Employment Program

Indicate the special employment program: *Not Applicable, Other, Presidential Management Intern, SES Candidate Development,* or *Veteran's Readjustment Program.*

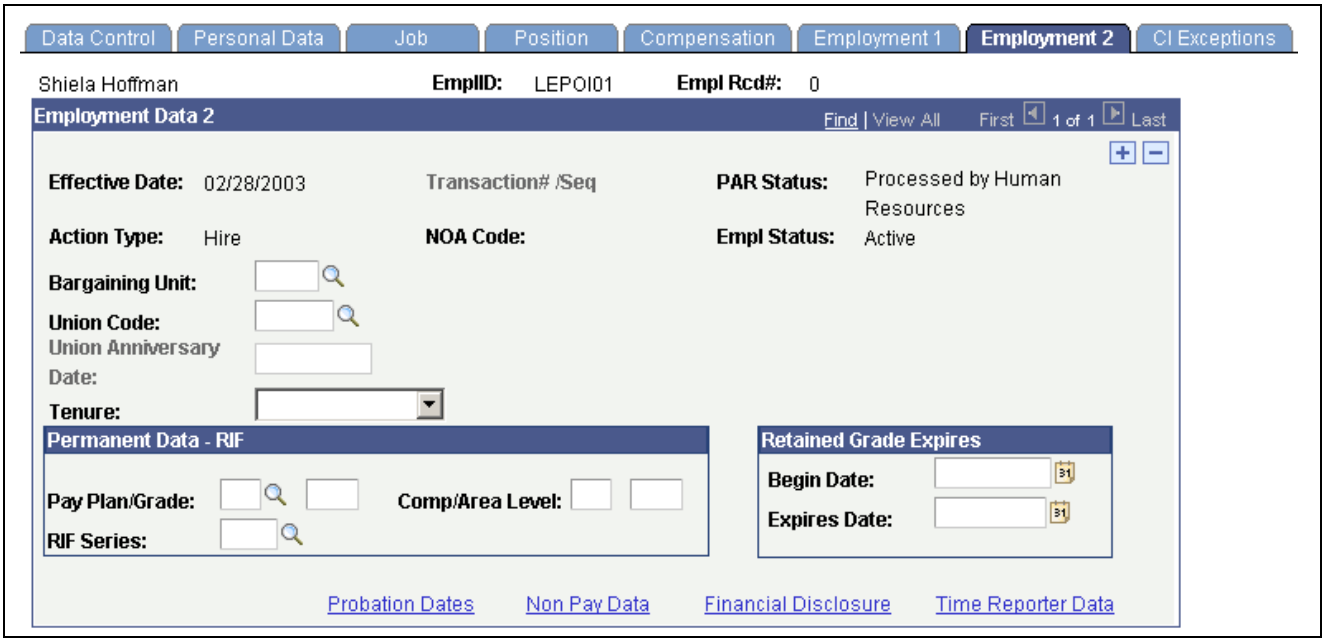
Appointment Limits

Amount, Hours, and **Days**

Depending on the type of appointment used to hire the employee, enter the appointment limits amount, hours, or days.

Entering Additional Employment Information

Access the Employment 2 page.



Employment 2 page

Bargaining Unit

Select a code representing the bargaining unit to which the employee belongs.

Union Code

If your new employee belongs to a union, select the appropriate union code.

Union Anniversary Date

If the bargaining unit covers the position and the employee has elected to join, enter the date on which the employee's seniority ranking within the union is based.

Tenure

Indicate the type of tenure.

Copyright © 1988-2006, Oracle. All rights reserved.

Retained Grade Expires

Begin Date and **Expires Date** — Where appropriate, enter the employee's retained grade begin date and expires date. These are informational fields provided for the agency to track the employee's eligibility to maintain retained grade.

Permanent Data-RIF

These informational fields enable the agency to track the employee relative to RIF processing.

Pay Plan/Grade — Enter the employee's pay plan and pay grade.

Comp/Area Level — Enter the employee's compensation area and level.

RIF Series — Select the employee's RIF series.

Links

Probation Dates — Click to access the Probation Dates page and enter information related to probation periods.

Non Pay Data — Click to access the Non Pay Data page and enter information related to a status of non-pay.

Financial Disclosure — Click to access the Financial Disclosure page and enter information related to the employee's financial disclosure requirement.

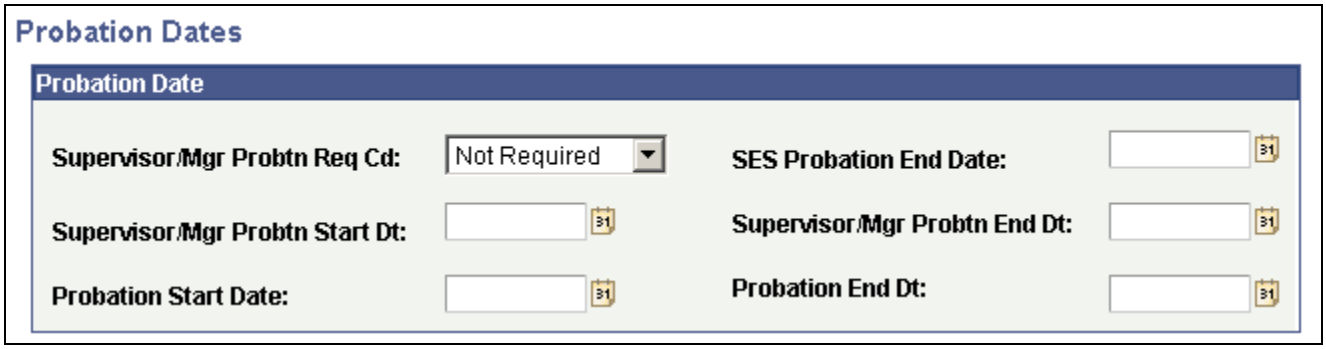
Time Reporter Data — Click to review PeopleSoft time and labor data for this employee. If you aren't using PeopleSoft Enterprise Time and Labor, the link is unavailable.

See Also

Chapter 19, "(USF) Processing Automatic Actions for Probation, Tenure, and WGIs," page 637

Tracking Probation Dates

Access the Probation Dates page.



Probation Dates page

Supervisor/Mgr Probtn Req Cd (supervisor manager probation required code) — Identifies whether a supervisory/managerial probationary period is required, served, or waived.

Copyright © 1988-2006, Oracle. All rights reserved.

SES Probation End Date (Senior Executive Service probation end date) — Enter the applicable probation end date.

Supervisor/Mgr Probtn Start Dt (supervisor/manager probation start date) — The starting date for the supervisory/managerial probationary period, or for the SES probationary period.

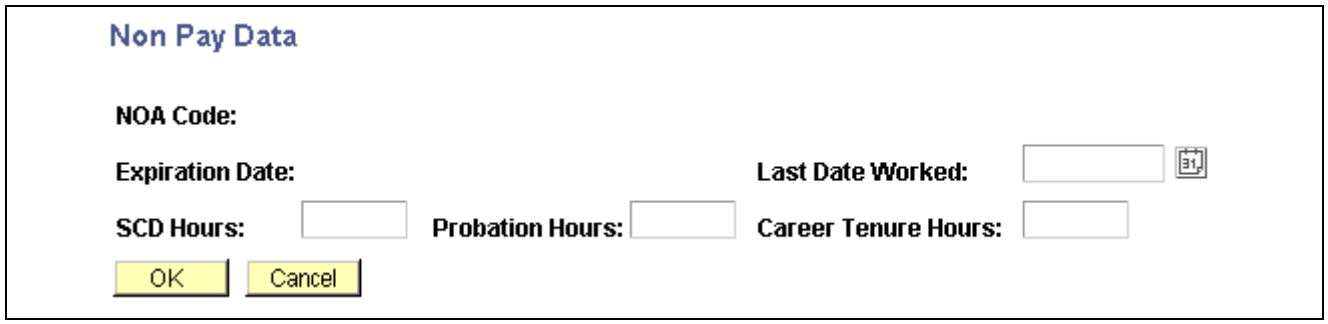
Supervisor/Mgr Probtn End Dt (supervisor/manager probation end date) — Enter the applicable probation end date.

Probation Start Date — Identifies whether the employee's appointment is subject to completion of a one year probationary (or trial) period and to show the commencing date of the probationary period.

Probation End Date — Enter the applicable probation end date.

Tracking Nonpay Status Information

Access the Non Pay Data page.



Non Pay Data page

NOA Code — Indicates the PAR processed to place the employee in a nonpay status.

Expiration Date — The nonpay expiration effective date, which reflects the projected expiration of nonpay status and consequent processing of a PAR to return to pay status.

Last Date Worked — Enter the date last worked prior to being placed in a nonpay status.

SCD Hours, Probation Hours, and **Career Tenure Hours** — Enter and track SCD hours, probation hours, and career tenure hours in these informational fields.

Entering Financial Disclosure Information

Access the Security Info page.



Financial Disclosure page

Copyright © 1988-2006, Oracle. All rights reserved.

Financial Disclosure Required and **Due Date** — If a financial disclosure is required, select this check box, and enter the due date for receipt.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions, "Setting Up Positions," (USF) Setting Up Position Titles

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions, "Setting Up Positions," Creating Positions

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up Jobs," Classifying Jobs

Viewing Component Interface Exceptions

Access the CI Exceptions page.

Data Control | Personal Data | Job | Position | Compensation | Employment 1 | Employment 2 | CI Exceptions

EmplID: 0022 **Empl Rcd#:** 0

Effective Date: 03/01/2005 **Transaction# /Seq** 1 **PAR Status:** Processed by Human Resources

Action Type: Hire **NOA Code:** 100 **Empl Status:** Active

Customize | Find | First

	Severity	Message Text
1		Component Interface CI_PERSONAL_DATA started at 16.34.03.000000 (18016,100)
2		Accessing CI with CreateKeys at 16.34.05.000000 (18016,105)
3		Performing action U on Data Collection PS_ROOT (18016,108)
4		Setting properties on data item with keys KEYPROP_EMPLID=0022. (18016,126)
5		Successfully setting Property PROP_DERIVED_EMP to Value Y. (18016,125)
6		Successfully setting Property PROP_BIRTHDATE to Value 1960-02-02. (18016,125)
7		Performing action U on Data Collection COLL_PERS_DATA_EFFDT (18016,108)
8		Setting properties on data item with keys KEYPROP_EFFDT=2005-03-02. (18016,126)
9		Successfully setting Property KEYPROP_EFFDT to Value 2005-03-01. (18016,125)
10		Successfully setting Property PROP_SEX to Value M. (18016,125)
11		Successfully setting Property PROP_HIGHEST_EDUC_LVL to Value 01. (18016,125)
12		Invalid value -- press the prompt button or hyperlink for a list of valid values (15,11)
13	Error	Error changing value. {CI_PERSONAL_DATA.COLL_PERS_DATA_EFFDT(1).PROP_HIGHEST_EDUC_LVL} (91,34)
14		Successfully setting Property PROP_MAR_STATUS to Value U. (18016,125)
15	Error	Errors found prior to saving CI. Changes have not been saved. (18016,133)
16		CI ended at 16.34.17.000000 (18016,101)

CI Exceptions page

After you insert your personnel action, and have completed it to the best of your knowledge, update the PAR status to *PRO* (processed), and click the Savebutton. The system updates all the relevant tables with the new data. The system uses a series of Component Interfaces (CIs) to make these updates. Should the CIs encounter an Error, the personnel action update will stop and roll back to the original state and thus no updates will be saved until you address the Error and click Save again.

Copyright © 1988-2006, Oracle. All rights reserved.

Should the CIs encounter any warning messages, the update will continue while the warning messages are displayed for you in the CI Exceptions page after the transaction has been successfully saved. These warnings are relevant to the processed transaction and will be automatically deleted after another personnel action is processed. It is good practice to note the warnings and contact your PeopleSoft Technical Administrator to help resolve them. The CI Exceptions page displays an auto-generated step-by-step documentation of what the CIs are executing which provides valuable insight into the back-end technology used in the Federal product.

Assigning Employees to Positions

If you organizing part or all of PeopleSoft Enterprise Human Resources by position (using PeopleSoft Enterprise Human Resources Manage Positions), you can hire some or all new employees into positions on the Hire Employee pages, accessed from the Workforce Administration, Increase Workforce menu. If you're not using PeopleSoft Enterprise Human Resources Manage Positions, you can also use position numbers but the system won't process position-related data.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions, "Setting Up Positions"

Hiring Job Applicants

You can initiate the hire process from the Recruiting component. After an applicant is selected you can take the action of "Prepare for Hire" to submit the hire request. The hire transaction is completed using the Manage Hires transaction in the Workforce Administration component. Both Recruiting and Template-Based Hire use the Manage Hires page.

See Chapter 6, "Increasing the Workforce," Increasing the Workforce Through Templates and Job Applicants, page 208.

See *PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook*, "Hiring Applicants," Hiring Applicants.

Printing Appointment Affidavits and Preliminary Employment Data Forms

This section lists the pages used to run the Appointment Affidavits (FGSF61) and Request for Prel Employ Data (request for preliminary employment data) (FGSF755) reports.

Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Print the Forms

Page Name	Object Name	Navigation	Usage
SF61 Report	RUNCTL_FGSF61	Workforce Administration, Job Information, Reports, Appointment Affidavits USF	Produces an Appointment Affidavit STANDARD FORM 61 form to be signed by an appointee.
SF-75 Run Control	RUN_CNTL_FGSF75	Workforce Administration, Job Information, Reports, Request Prelim Empl Data USF	Produces a Request for Preliminary Employment Data form.

Copyright © 1988-2006, Oracle. All rights reserved.

CHAPTER 8

Entering Additional Data in Human Resources Records

This chapter provides an overview of additional worker data and discusses how to:

- Locate personnel records.
- Track workforce contracts.
- Enter temporary assignments.
- Track disabilities.
- Handle company credit cards.
- Handle company property.
- Track dependent and beneficiary data.
- Track emergency contacts.
- Manage citizenship and visa or permit information.
- Manage driver's license information.
- Enter bank account information.
- Track volunteer activity.
- Set up and track military availability and approvals.
- Enter and track additional workforce data.
- Set up and track security clearance and badge access.

Understanding Additional Worker Data

After you've entered a worker's basic personal information and created one or more organizational instances for them, use other pages in the Workforce Administration menu to add and track a broad range of other information for that person.

While many of the pages covered in this chapter are optional, you may find them useful for tracking and reporting, and for maintaining compliance with government regulations. You can also provide other people, such as your employees or industrial relations representatives, with information that helps them perform their jobs more effectively.

Copyright © 1988-2006, Oracle. All rights reserved.

Locating Personnel Records

When you open an additional information page, the system displays the dialog box for you to select the person. If you don't know the person's employee ID, there are alternate ways to locate the person's record:

- Use the search dialog box to search for the correct record by name or partial last name or middle name.

  Advanced search options may also be available.

- Use the Search for People page to search for a person ID by name, address, city, date of birth, gender, or national ID.
- Use the Search by National ID page to find a person's person ID by using a national ID.

  After you have the person's employee ID, enter it in the dialog box for the page you are accessing.

This section discusses how to:

- Search with the search dialogue.
- Search for person information.
- Search by national ID.

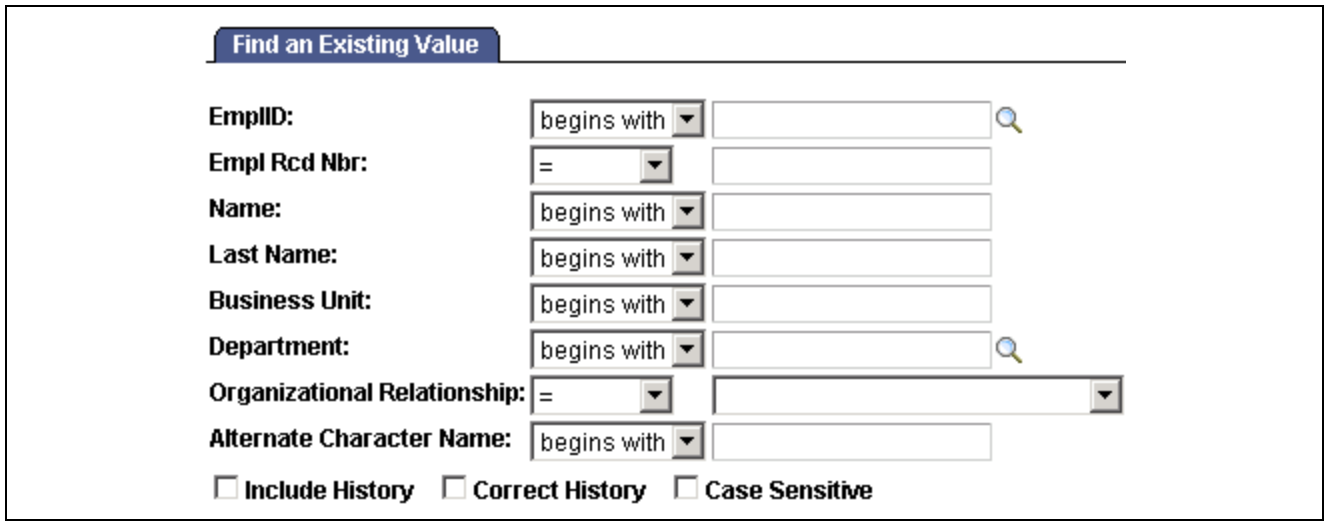
Pages Used to Locate Personnel Records

Page Name	Object Name	Navigation	Usage
Search for People	HCR_SM_SEARCH	Workforce Administration, Personal Information, Search for People	Search for and select a person.
Search by National ID	NID_LOOKUP	Workforce Administration, Personal Information, Biographical, Search by National ID	Locate a person's employee ID by using the national ID. When you find the person's employee ID, use it when you move to other search pages.

Searching with the Search Dialogue

Use the following search dialog box to find a person's information. You encounter this sort of dialog box when you enter most pages in the Workforce Administration menu. You can also enhance the component's underlying search record to expose other fields as alternate search criteria or as list box items. These fields may include relevant additional fields such as: middle name, alternate character name, department, setID, organizational relationship, POI type, military rank, and so on.

Copyright © 1988-2006, Oracle. All rights reserved.



Enhanced search dialogue

You must have already created job records in PeopleSoft Enterprise Human Resources for the person for whom you are searching. In other words, you must have already added the person to the system and created an organizational instance for the person.

Empl Rcd Nbr

If the person has more than one organization instance or job record, enter the record that you want to access.

If you do not know which record you want to access, do not enter a value in this field. The system lists all the job records in the search results, enabling you to select the appropriate one.

Name, Last Name, and **Middle Name**

If you're not sure of the entire employee ID or name, make a partial entry in one of these fields and click Search to search for the correct name and ID.

You cannot use this field to search for last names using special characters, such as double-byte Japanese characters.

Organizational Relationship

Select the organizational relationship to narrow your search to *Employees, Contingent Workers,* or *Person of Interest.*

Alternate Character Name

If you selected the Alternate Character option for your user ID on the Primary Permission List Preferences table, you can also search for employee names by using the Alternate Character search feature in PeopleSoft Enterprise Human Resources.

Military Service, Rank, and **Worn Rank**

Enter the military information to search for people associated with a military service or rank. The military fields must be activated after installation or upgrade if you choose to have these fields appear as an alternate search key or list box attribute.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Working with System Data Regulation in HRMS"

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Working with Languages," Working with Double-Byte Characters

Copyright © 1988-2006, Oracle. All rights reserved.

Searching for Person Information

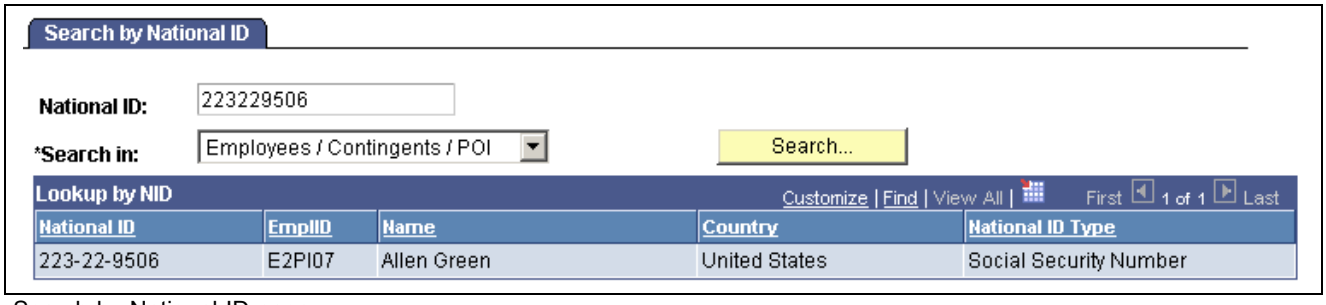
Access the Search for People page.

This page enables users of an application to search for and select a person to process. Using this system, an application can easily render a UI that prompts the user for partial names and displays a list of candidates from which the user can select. Additional features include optional drill-down to additional non-sensitive data.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring Person Search.

Searching by National ID

Access the Search by National ID page.



Search by National ID page

National ID Enter the national ID of the person whose records you want to view.

Search In Select *Employees / Contingents / POI* or *Dependents and Beneficiaries* to narrow your search.

Note. *Employees / Contingents / POI* includes all people who were added to the system on the Personal Information component, including contingent workers and people of interest.

Search Click to have the system display a list of the records that match the ID that you entered.

Tracking Workforce Contracts

This section discusses how to:

- Add basic contract information.
- Add special contract clause information.
- View task order information.
- Add signature date, responsible party, and probation information.
- Generate the Contract Information report.

Copyright © 1988-2006, Oracle. All rights reserved.

Note. Contracts are driven by regulatory region (and that region's setID) on the job data record associated with the contract. On the Update Contracts component, you must select the regulatory region that is on the person's job data record and the system only makes available contract clauses and types that share the setID of this regulatory region.

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "(E&G) Administering Contract Pay"

Chapter 2, "Setting Up the Administer Workforce Business Process," Setting Up Workforce Contracts, page 41

Copyright © 1988-2006, Oracle. All rights reserved.

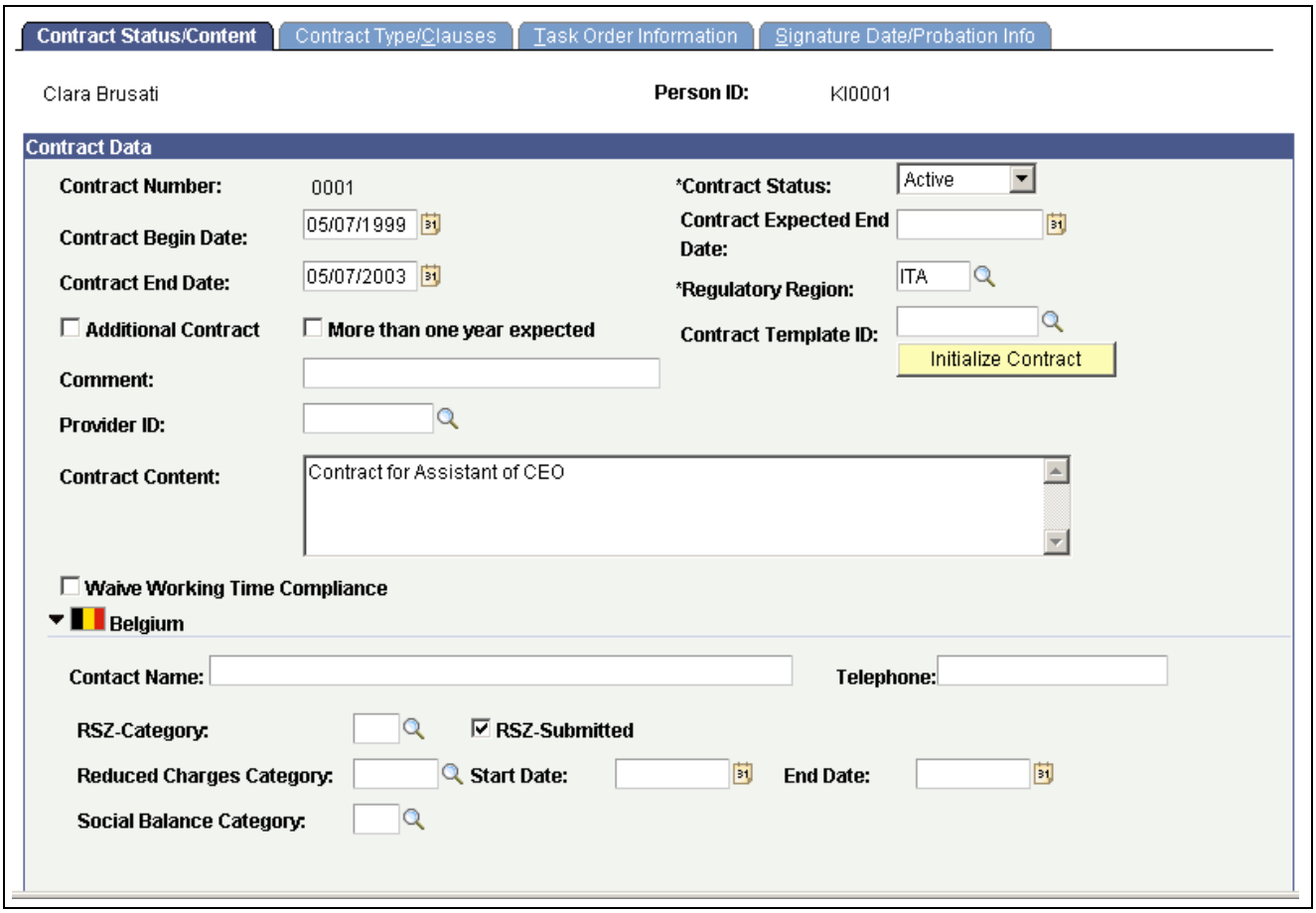
Pages Used to Track Workforce Contracts

Page Name	Object Name	Navigation	Usage
Contract Status/Content	CONTRACT1	Workforce Administration, Job Information, Contract Administration, Update Contracts, Contract Status/Content	Add or update basic information about the contract between your organization and a worker, including the contract duration, type, and content. You must have previously set up contract template IDs on the Contract Template Table page.
Contract Type/Clauses	CONTRACT2	Workforce Administration, Job Information, Contract Administration, Update Contracts, Contract Type/Clauses	Add or update any special contract clause information to the standard contract language for this worker.
Original Contract Data	CONTRACT_BEL_SEC	Click Original Contract on the Contract Type/Clauses page.	(BEL) Enter information about the original contract that the new contract is replacing.
Task Order Information	CONTRACT4	Workforce Administration, Job Information, Contract Administration, Update Contracts, Task Order Information	Track contractor work to a more detailed line item, rather than at the contract level. This may enable more accountability and tracking of contractors. This page is optional.
Signature Date/Probation Info	CONTRACT3	Workforce Administration, Job Information, Contract Administration, Update Contracts, Signature Date/Probation Info	Add or update the signature date, responsible party, and probation information. View basic job data.
Contract Information	RUNCTL_CNT001	Workforce Administration, Job Information, Contract Administration, Contract Information Report	Generate the Contract Information report (CNT001) that lists all contracts and task orders (subcontracts) for a worker or the contract history for all workers within a designated period.

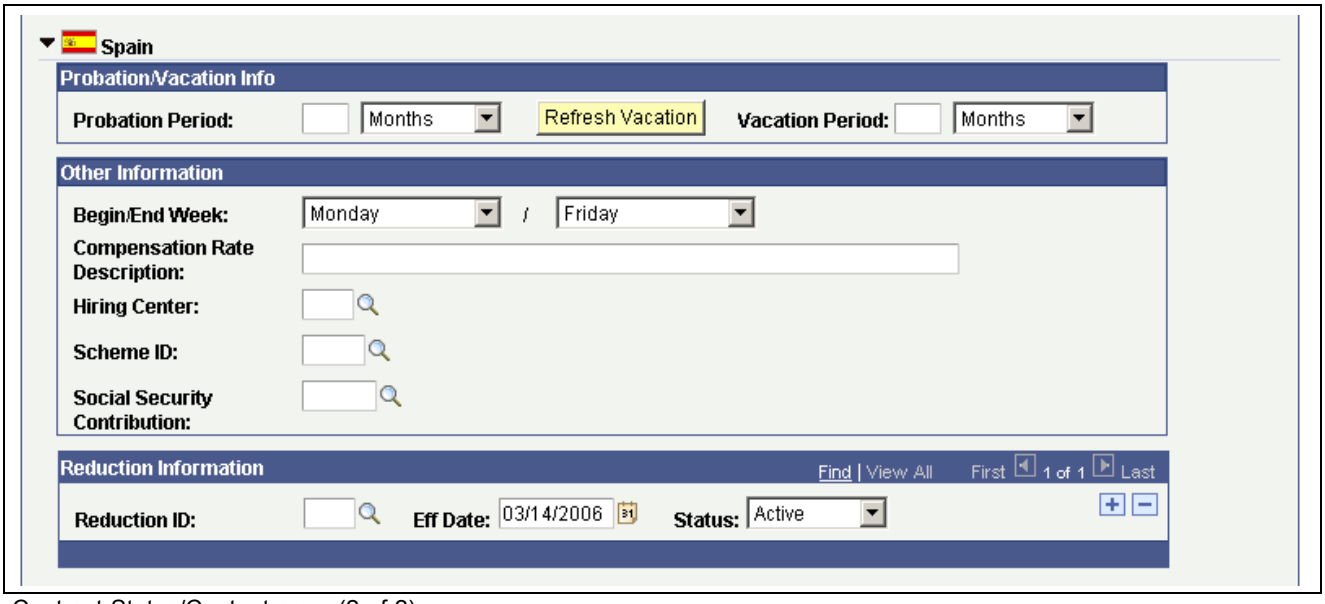
Adding Basic Contract Information

Access the Contract Status/Content page.

Copyright © 1988-2006, Oracle. All rights reserved.



Contract Status/Content page (1 of 2)



Contract Status/Content page (2 of 2)

Contract Status Indicate whether the contract is *Active* or *Inactive.*

Contract Begin Date Enter the date when the contract begins. The current date is the default.

Copyright © 1988-2006, Oracle. All rights reserved.

Contract Expected End Date Enter the date when you expect the contract will end.

Contract End Date Enter the date when the contract actually ended. This date may differ from the date that you expect the contract to end.

Regulatory Region Enter a regulatory region. The regulatory region must share the setID of the contract type and be the regulatory region on the person's job data record for this contract.

Additional Contract Select if the worker already has at least one contract. Leave this field blank if this is the worker's only contract.

More than one year expected Select if you expect that this contract will result in more than one year of employment for this worker.

Note. This field is required for contracts with Japanese workers.

Contract Template ID and **Initialize Contract** If you have defined a template for the contract, select an ID from the list of valid templates stored on the Contract Template Table page, and click Initialize Contract. The system displays a description of the contract and its default contents.

Note. If there are any task orders associated to the contract template, only those task orders with an effective date on or after the individual's Contract Begin Date will default to the individual contract level.

Comment Enter a comment for this contract.

Provider ID If this contract is with a contingent worker, specify the person's provider, agency, or employer.

Contract Content If you entered a contract template code and clicked the Initialize Contract button, the system automatically completes this field with the content that was entered on the Contract Template Table page. Otherwise, enter the contract language.

Waive Working Time Compliance Select if the contract allows working time compliance to be waived by the worker.

(BEL) Belgium

RSZ-Category If you're entering a contract and you selected *Employment* as the contract type on the Contract Type / Clauses page, choose an RSZ category from the valid RSZ category codes stored on the RSZ Category Table page (CNT_RSZ_TBL_BEL).

RSZ-Submitted Select to indicate that social insurance premiums need to be paid by the worker to the Belgian RSZ governing body for this job contract.

Reduced Charges Category Select from among the categories, if appropriate.

Employers can lower their RSZ premium contributions if they are offering a job for one of the two reduced charges categories. Companies that employ workers who qualify for the reduced charges category enjoy lower employee costs.

 Copyright © 1988-2006, Oracle. All rights reserved.

Social Balance Category Select the appropriate social balance category. This information is included on the BEL Social report.

(ESP) Spain

Probation Period If this worker's contract includes a probation period, use these two fields to specify how long it is. Use the first field to enter the appropriate quantity and the second field to select a unit of time. Units of time are *Days, Months,* or *Years*. For example, if the probation period is six months, enter *6* in the first field, and then select *Months* in the second field.

Refresh Vacation Click to enter the default value for vacation periods from the Labor Agreement page in the Vacation Period field.

Vacation Period Use these two fields to specify how much vacation the worker receives per year. Use the first field to enter the appropriate quantity and the second field to select a unit of time. Units of time are *none, Months, Natrl Days* (natural days), *Weeks,* or *Work Days*. For example, if the vacation period is 20 work days, enter *20* in the first field, and then select *Work Days* from the options in the second field.

Begin/End Week Specify the days when the worker's work week begins and ends. The default values are *Monday* and *Friday.*

Compensation Rate Description Enter a free-form description of the worker's compensation rate.

Hiring Center Select the hiring center that is responsible for hiring this person.

Scheme ID Select a scheme ID.

Social Security Contribution Select a social security contribution ID for the selected contract and scheme ID. The system uses both the scheme ID and the contribution ID for social security calculations, to determine the percentage or fixed amount that is applied to the calculation of a worker's contribution.

Reduction ID If the worker is entitled to a reduction in social security contributions, select the reduction that applies. Define reducion ID vlaues on the Reductions ESP component.

See *PeopleSoft Enterprise Global Payroll for Spain 9.0 PeopleBook*, "Setting Up Social Security Contributions," Defining Reductions.

Eff Date (effective date) and **Status** Enter the effective date and status of the specified reduction.

See Also

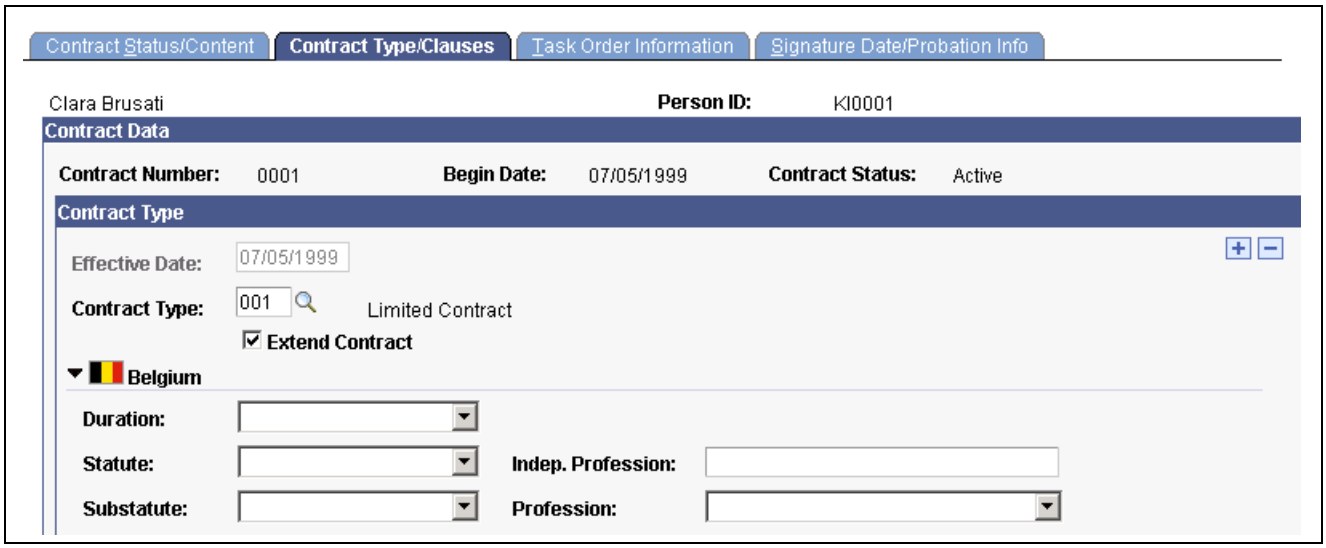
Chapter 3, "Setting Up Country-Specific Tables," (ESP) Setting Up Spanish Workforce Tables, page 67

Chapter 3, "Setting Up Country-Specific Tables," Defining Maximum and Minimum Social Security Ceilings, page 70

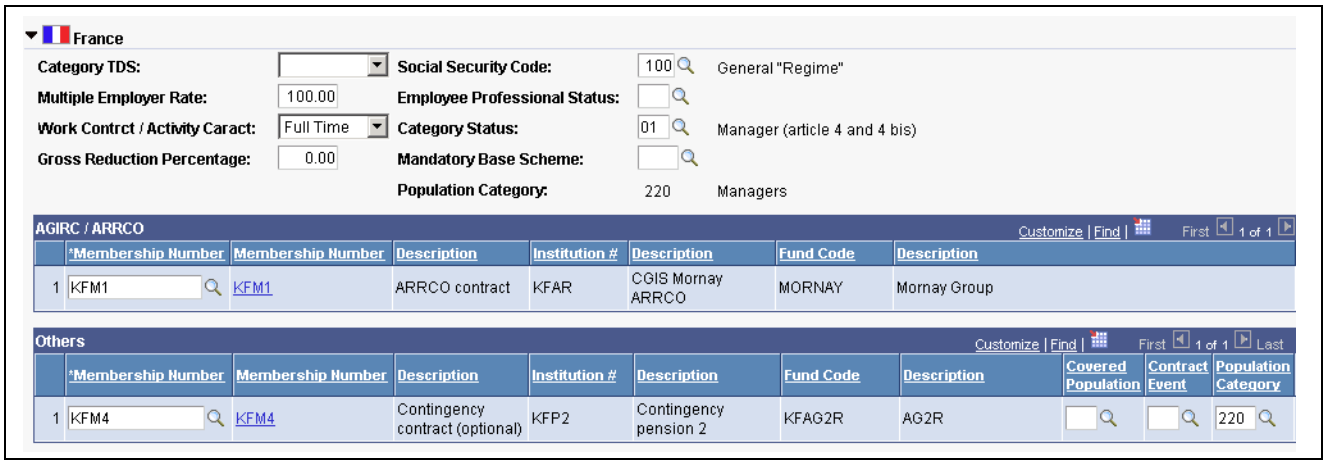
Adding Special Contract Clause Information

Access the Contract Type/Clauses page.

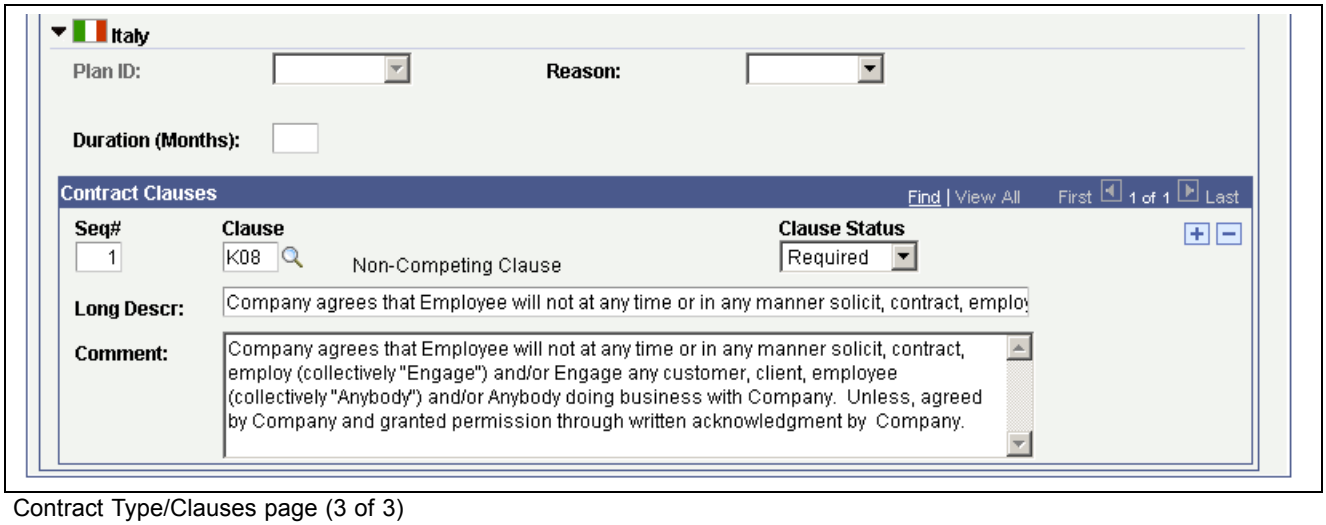
Copyright © 1988-2006, Oracle. All rights reserved.



Contract Type/Clauses page (1 of 3)



Contract Type/Clauses page (2 of 3)



Contract Type/Clauses page (3 of 3)

Contract Type Select the contract type.

Copyright © 1988-2006, Oracle. All rights reserved.

Extend Contract Indicate if the individual's original contract has been extended beyond it's original date or purpose.

Contract Clauses

Seq# (sequence number) When you add a clause to the contract, the system assigns a sequence number automatically.

Clause Select a clause.

Clause Status The status that is associated with the clause that you selected appears by default.

(BEL) Belgium

Duration Select a duration period for the workforce contract.

Original Contract If *Replacement* defines the duration period, the Original Contract link appears. Click to access the Contract Replacement page to enter the employee ID and original contract number.

Statute Select a contract statute, or employment category, for this worker.

Indep. Profession (independent profession) If you selected *Self employed* as the contract type, provide the worker's independent profession here.

Substatute Select a substatute, or employment subcategory. The system displays only those substatutes that are associated with the statute code that you selected.

Profession If you selected *Member of the Professions* as the contract type, indicate additional profession information here.

(FRA) France

Category TDS Select a worker category: *Apprentice, Executive,* and *Manager.* This field is used to prepare the DADS TDS report.

Social Security Code Select a social security code. The social security code is the contribution class, or régime, of the worker. Any worker who is eligible for a contribution must be associated with a social security code.

Multiple Employer Rate The earnings ceiling is reduced if an employee has multiple contracts active at the same time. The reduction appears here as a percentage.

If a worker has more than one employer, use the multiple employer rate to indicate the percentage of contributions that should be taken from each employer to avoid over-taxing. The earnings ceilings are prorated using this rate. For example, suppose that a worker has two employers, and he receives 40 percent of his salary from employer A and 60 percent of his salary from employer B. In the Multiple Employer Rate field, employer A enters *40* and employer B enters *60.*

Employee Professional Status Select the profession that is designated for this worker.

Work Contrct/Activity Caract Used to prepare the DADS TDS report. Values are *Full Time, Home, Intermitt., Part Time, Seasonal W, Temporary,* and *Wo Ctc Cpl.*

Copyright © 1988-2006, Oracle. All rights reserved.

Category Status Select the category status. The category status affects the type of pension/contingency fund to which the employee contributes.

Gross Reduction Percentage The gross reduction percentage is applied to the gross salary for specific job categories, such as for journalists and artists. These workers do not pay their contributions on their gross salaries. Instead, their gross salaries are reduced by the percentage indicated here. For example, suppose that a worker is entitled to a 30 percent reduction. If he has a salary of 1500 EUR, he contributes for only 1000 EUR. This field has a default value of *0*.

Mandatory Base Scheme Select the base compensation scheme for this workforce contract.

Population Category Displays the population category that applies to the employee. The system determines the population category from the INSEE code associated with the employee's job code. INSEE codes are linked to population categories on the Insee Table Fra page.

AGIRC/ARRCO Use this group box to assign the employee to an AGIRC or ARRCO pension contract, if you want to override the contracts defined for the employee's company or establishment. Use the Pension/Cont. Contracts Review page to view a list of the pension and contingency funds for which an employee is eligible.

Select the AGIRC/ARRCO contract in the Membership Number field and the system completes the remaining fields in this group box.

Click the link in the Membership Number column to view the contract details. The system displays the Pension/Contingency Contracts page.

Note. Employees should be assigned to only one contract with an institution type of AGIRC or ARRCO on any given date.

See Chapter 3, "Setting Up Country-Specific Tables," (FRA) Setting Up French Workforce Tables, page 47.

See Chapter 10, "Managing Country-Specific Workforce Data," (FRA) Providing Additional Information for French Workers, page 388.

Others Use this group box to assign the employee to a contingency fund contract. Contingency funds defined on this page are in addition to any contingency funds defined for the employee's company or establishment. Use the Pension/Cont. Contracts Review page to view a list of the pension and contingency funds for which an employee is eligible.

Select the contingency contract in the Membership Number field and the system completes the contract details fields.

Click the link in the Membership Number column to view the contract details. The system displays the Pension/Contingency Contracts page.

Select a value in the Covered Population field that indicates who is covered by the contract.

Select a value in the Contract Event field to indicate whether this is a new contract or the type of change in contract. Contract events are required for DADS reporting.

Select a value in the Population Category field to indicate the population category that applies. This value is required for DUCS reporting. The

 Copyright © 1988-2006, Oracle. All rights reserved.

default value is the population category for the employee's job code but you can override it.

See *PeopleSoft Enterprise Global Payroll for France 9.0 PeopleBook*, "Generating DADS".

See *PeopleSoft Enterprise Global Payroll for France 9.0 PeopleBook*, "Generating DUCS".

(ITA) Italy

Plan ID If the worker was assigned a contract type of *Training and Labor,* you must select a plan ID.

Reason If the worker was assigned a contract type of *001: Limited Contract,* you must enter a reason for the contract.

Empl ID Replaced If the reason for the determined period contract type is *Maternity* or *Replacement,* select the employee ID of the worker who is being temporarily replaced by this contract worker.

The following fields appear in the Target Categorization group box only if the contract type is *Training and Labor.*

Labor Agreement Select the labor agreement for this contract and plan ID.

Category Select the labor category for this contract.

Subcategory Select the subcategory for this contract.

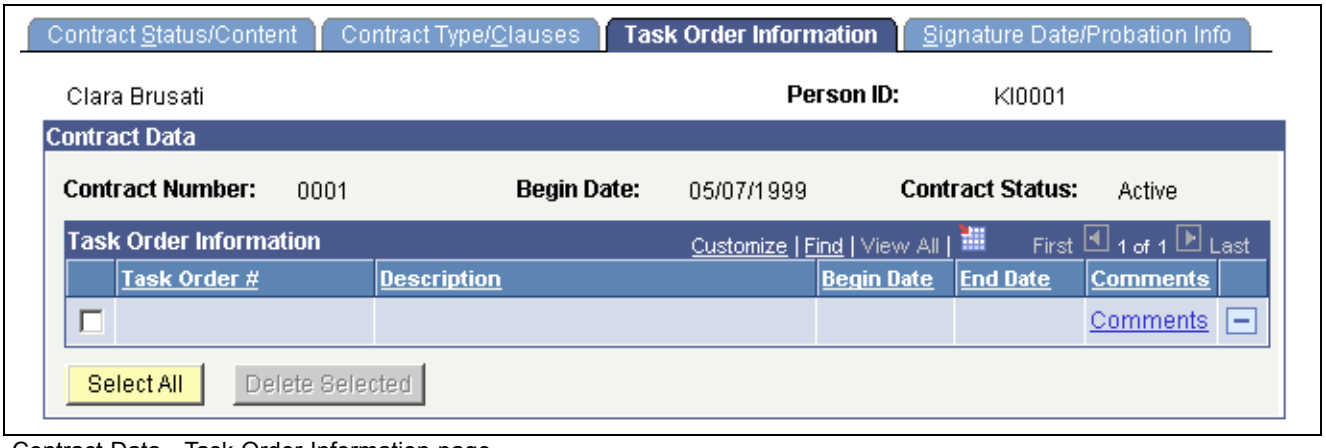
Subcategory 2 If the subcategory selected above has further divisions, select the subcategory 2 here.

See Also

Chapter 9, "(BEL) Entering Additional Data for Belgian Workers," Setting Up Belgian Employment Contract Statutes for Claeys Calculations, page 364

Viewing Task Order Information

Access the Contract Data - Task Order Information page.



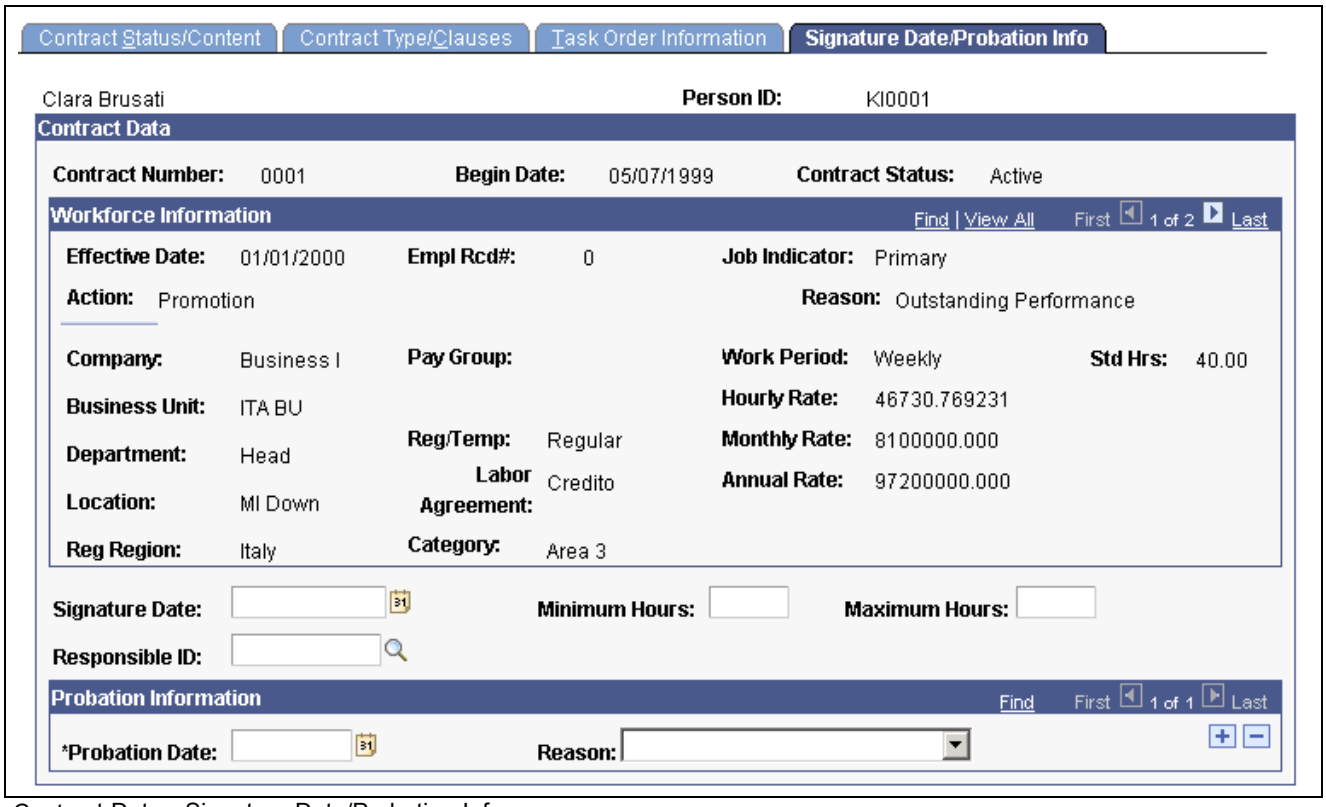
Contract Data - Task Order Information page

Copyright © 1988-2006, Oracle. All rights reserved.

If you are using Contract Templates, this page enables you to manage the task orders, such as subcontracts, with which an individual is associated with under the primary contract template. Once you enter the contract template ID and initialize the contract, the system will enter any task orders that have a begin date on or after the contract begin date. You can then manage the specific task orders and enter comments associated with this person.

Adding Signature Date, Responsible Party, and Probation Information

Access the Contract Data - Signature Date/Probation Info page.



Contract Data - Signature Date/Probation Info page

The display-only data at the top of this page is derived from the Job Data component.

Signature Date — Enter the contract's signature date. This information is required in some European countries, including Germany.

Minimum Hours and **Maximum Hours** — The system supplies default values from the Installation table for this contract.

Responsible ID — Enter the company agent who drafted the contract and who is responsible for its language.

Probation Date — Enter multiple probation dates if they are required for this worker.

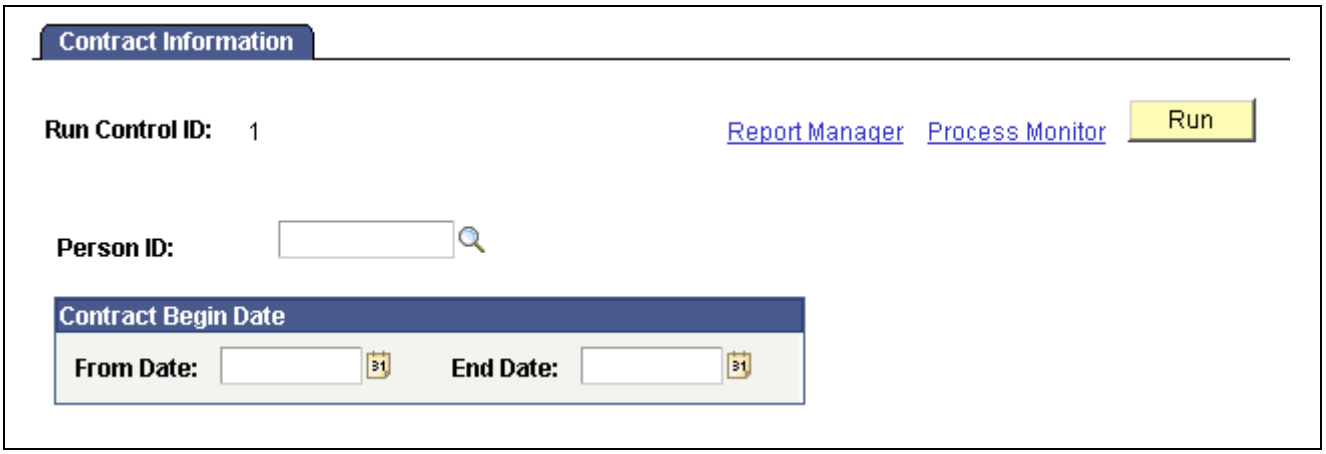
The probation date that you enter here also appears on the job data record for this worker.

Copyright © 1988-2006, Oracle. All rights reserved.

Reason Indicate a probation reason, including *New Date* and *Un-perform* (indicating additional probation time for failure to perform within expectations for the position).

Generating the Contract Information Report

Access the Contract Information run control page.



Contract Information page

Person ID Enter the person ID of the worker for whom you want to list contracts. If you leave this field blank, the report prints the contract history (within the date range that you specify) for all workers.

From Date and **End Date** Enter the date range for which you want contract information.

Entering Temporary Assignments

This section provides an overview of temporary assignments and substantive jobs and discusses how to:

- Enter a temporary assignment.
- Run the temporary assignment termination and substantive job reactivation process.
- Add a partial temporary assignment.

Understanding Temporary Assignments and Substantive Jobs

This section discusses:

- Substantive jobs.
- Temporary assignments.
- Data row impacts.
- Additional considerations for temporary assignments and data processing.

Copyright © 1988-2006, Oracle. All rights reserved.

Substantive Jobs

The substantive job assignment is the worker's original job, created when the first employment or contingent worker instance was added.

Temporary Assignments

When a worker covers the responsibilities of another job besides the substantive job, the worker works a temporary assignment. Temporary assignment data must be tracked the same way that substantive job data is tracked.

For example, a person hired into a teaching appointment takes this as the substantive job. The person then receives a one month temporary assignment as a department head. The original teaching position is suspended for the duration of the temporary assignment.

It is also possible that the person takes a temporary assignment on a partial basis. The person might retain the substantive teaching position for twenty hours a week while also working the temporary assignment as department head for the other twenty hours. The person cannot work beyond the forty-hour workweek, but any combination of assignments might be entered to fill the forty hours.

Data Row Impacts

The Temporary Assignments feature requires that the system insert data rows at various stages throughout the process. For example, when selecting *Temporary Assignment* as the action or reason, the system inserts a second data row that puts the substantive job on hold. When a data row has been inserted by the system, the word *system* appears next to the employment record number (ERN) when viewed later. These data rows show an action or reason of *SUB* (hold substantive job), *RFA* (return from temporary assignment), or *RTS* (return to substantive job).

The substantive job retains its ERN while it is suspended and the temporary assignment is identified by a new ERN. This process enables the system to uniquely identify both job data records and maintain them simultaneously.

Additional Considerations for Temporary Assignments and Data Processing

Review these additional considerations when creating temporary assignments:

- When position data changes, the system updates position data for all workers in the affected position regardless of whether the assignment is temporary or substantive.

  This update does not alter the active or inactive status of the workers in the affected position.

  Similarly, when the substantive position changes, the system does not change the temporary assignments for the worker. The only exception is the unlikely possibility that a worker's temporary and substantive assignments are in the same position.

- The worker's pay rate matches the active assignment.

  If a worker works multiple assignments beyond the substantive job, the system prorates the pay for each assignment. For example, if the employee teaches for twenty hours a week and acts as department head for twenty hours a week, payroll processes each job at 50% of the standard pay. To change the pay rate, you can override the position data manually on the Compensation page.

Note. Use the Job Data component pages for creating temporary assignments.

 Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Process Temporary Assignments

Page Name	Object Name	Navigation	Usage
Reactivate/Termination Update	RC_TEMP_ASSGN_UPDT	Workforce Administration, Job Information, Temporary Assignments, Reactivate/Update Termination	Run the temporary assignment termination and substantive job reactivation process.
Temp Assignment w/out End Date	RUNCTL_TAS001	Workforce Administration, Job Information, Temporary Assignments, Temp Assignmt w/out End Date	Run the Temp Assignment w/out End Date report (TAS001). The report lists workers currently on temporary assignment where end dates have not been defined.
Temp Assignmt Due to Complete	RUNCTL_TAS002	Workforce Administration, Job Information, Temporary Assignments, Temp Assignmt due to Complete	Run the Temp Assignment due to Complete report (TAS002). This report lists workers due to complete temporary assignments within the user specified date range.

See Also

Chapter 2, "Setting Up the Administer Workforce Business Process," Defining Personnel Actions and Reasons, page 5

Entering a Temporary Assignment

Access the Job Data - Work Location page.

To enter a temporary assignment:

1. Locate the substantive job that will be put on hold during the temporary assignment.
2. Insert a new data row with the following parameters:
   - Enter the effective date that the temporary assignment begins.
   - Enter *Temporary Assignment* in the Action/Reason field.

     When you use this value in the Action/Reason field, the system suspends the worker's substantive job, transferring the substantive job data, including payroll and benefits information, to the next job record for this worker. The Reactivation/Termination process reactivates the substantive job upon termination of the temporary assignment.
   - Enter the temporary assignment position number, if applicable.
3. (Optional) On the Job Data − Job Information page, enter the termination date for the temporary assignment in the Planned Exit field.
4. (Optional) Select the End Job Automatically check box to end the job on the termination date.

   This action also reactivates the substantive job when you run the Reactivation/Termination process.
5. Select the type of duties in the Duties Type field for this temporary assignment.

Copyright © 1988-2006, Oracle. All rights reserved.

Note. You must enter the planned exit date *and* select the End Job Automatically option for the Reactivation/Termination process to run automatically for each assignment. If you do not complete these fields, the termination of the temporary assignment and reactivation of the substantive job must be handled manually.

Whereas the previous procedure outlines the required actions for entering temporary assignments, you can also make other adjustments, as necessary, on any of the pages in the component. For example, it might be necessary to adjust the pay rate on the Compensation page. You should make this adjustment while creating the temporary assignment. When you save this information, the system suspends the substantive position.

Running the Temporary Assignment Termination and Substantive Job Reactivation Process

Access the Reactivate/Termination Update page.

Complete the Company and Expected Job End Date up to fields and run the Reactivate/Termination Update process (HR_REACTVTER).

This process must be run periodically to terminate temporary assignments (with job end dates) and to reactivate substantive positions. This process inserts new data rows into the job data record. These data rows have reason codes of *SUB* (hold substantive job), *RFA* (return from temporary assignment) and *RTS* (return to substantive job), and the designation *system* next to the employee record number when viewed later.

Adding a Partial Temporary Assignment

You can add a temporary assignment that is fewer than 40 hours per week while maintaining the substantive job that fills the remaining hours. For example, an employee who is assigned to a temporary position that requires only 10 hours a week retains the substantive position for the other 30 hours. In this case, both jobs must remain active.

To allow both jobs to remain active, use the Assign Additional Job component to enter the temporary assignment. You must then adjust the standard hours of the substantive position so that the hours for both jobs—substantive and temporary—equal 40 hours. You can still enter an end date for the temporary assignment and have that job end automatically. However, you must manually readjust the standard hours for the substantive position after the temporary assignment ends.

To replace a substantive job with two or more temporary assignments, choose one of the temporary assignments to replace the substantive job following the same procedure for assigning one temporary job, adjusting the hours appropriately. Then assign the second temporary position as a concurrent job.

If a worker has multiple substantive positions and is assigned one temporary position, the temporary assignment can only be assigned to one of the substantive positions. The other substantive positions must be manually suspended and reactivated using *Hold Substantive Job* and *Return to Substantive Job* as the action or reason.

Note. When assigning any combination of temporary assignments, you can still select the End Job Automatically check box on the Job Information page for the temporary assignment. However, if you have adjusted the standard hours for the substantive position, you must manually set the standard hours to the original setting when the temporary assignment has ended.

See Also

Chapter 6, “Increasing the Workforce,” Adding Additional Assignments, page 200

 Copyright © 1988-2006, Oracle. All rights reserved.

Tracking Disabilities

To set up tracking disabilities, use the Accommodation Type (ACCOM_TYPE_TABLE) component.

You can track any disabilities that your workers may have, as well as check your own facilities' accessibility. Administer Workforce includes a number of reports that list disability information.

This section discusses how to:

- Enter disability information.
- Document disability accommodations.
- (ITA) Run the ITA Disability report.

Pages Used to Track Disabilities

Page Name	Object Name	Navigation	Usage
Accommodation Type Table	ACCOM_TYPE_TABLE	• Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Accommodation Type • Workforce Monitoring, Meet Regulatory Rqmts, Define Regulatory Rqmts Data, Accommodation Types, Accommodation Type Table	Define the types of workplace accommodations that your organization makes for disabled workers.
Disability	DISABILITY	Workforce Administration, Personal Information, Disability, Disabilities, Disability	Enter disability information. Indicate if a worker is disabled and record details of the disability.
Accomm Request	ACCOMM_REQUEST	Workforce Administration, Personal Information, Disability, Disabilities, Accomm Request	Enter accommodation requests that a worker or applicant makes of your organization. You can also enter diagnosis codes for worker disabilities.
Accomm Option	ACCOMM_OPTION	Workforce Administration, Personal Information, Disability, Disabilities, Accomm Option	Enter the options that the organization or the person with a disability is considering to resolve each accommodation request.
Accomm Job Task	ACCOMM_JOB_TASK	Workforce Administration, Personal Information, Disability, Disabilities, Accomm Job Task	Enter the job tasks that you are accommodating, classified by job code and, where necessary, by location. If you create essential job tasks in the Job Code Task table, you can enter multiple job tasks for each accommodation.

Copyright © 1988-2006, Oracle. All rights reserved.

Page Name	Object Name	Navigation	Usage
Disability BRA	DISABILITY_BRA	Workforce Administration, Personal Information, Disability, Disabilities BRA, Disability BRA	Enter disability details.
(DEU) Disability Category Setup	DSB_EMP_CAT_SETUP	Workforce Administration, Personal Information, Disability, Disability Category Setup GER	Set up disability categories.
(DEU) Heavily Disabled	RUNCTL_PER039GR	Workforce Administration, Personal Information, Disability, Heavily Disabled DEU, Heavily Disabled GER	Run the Heavily Disabled report (PER039GR). This report lists heavily disabled workers and additional information about their disabilities.
(ITA) Disability Report	RUNCTL_PER060	Workforce Administration, Personal Information, Disability, Disability Report ITA	Run the Disability Report - ITA (PER060). This run control page runs the Annual, Name List, or Disability Statistics reports.

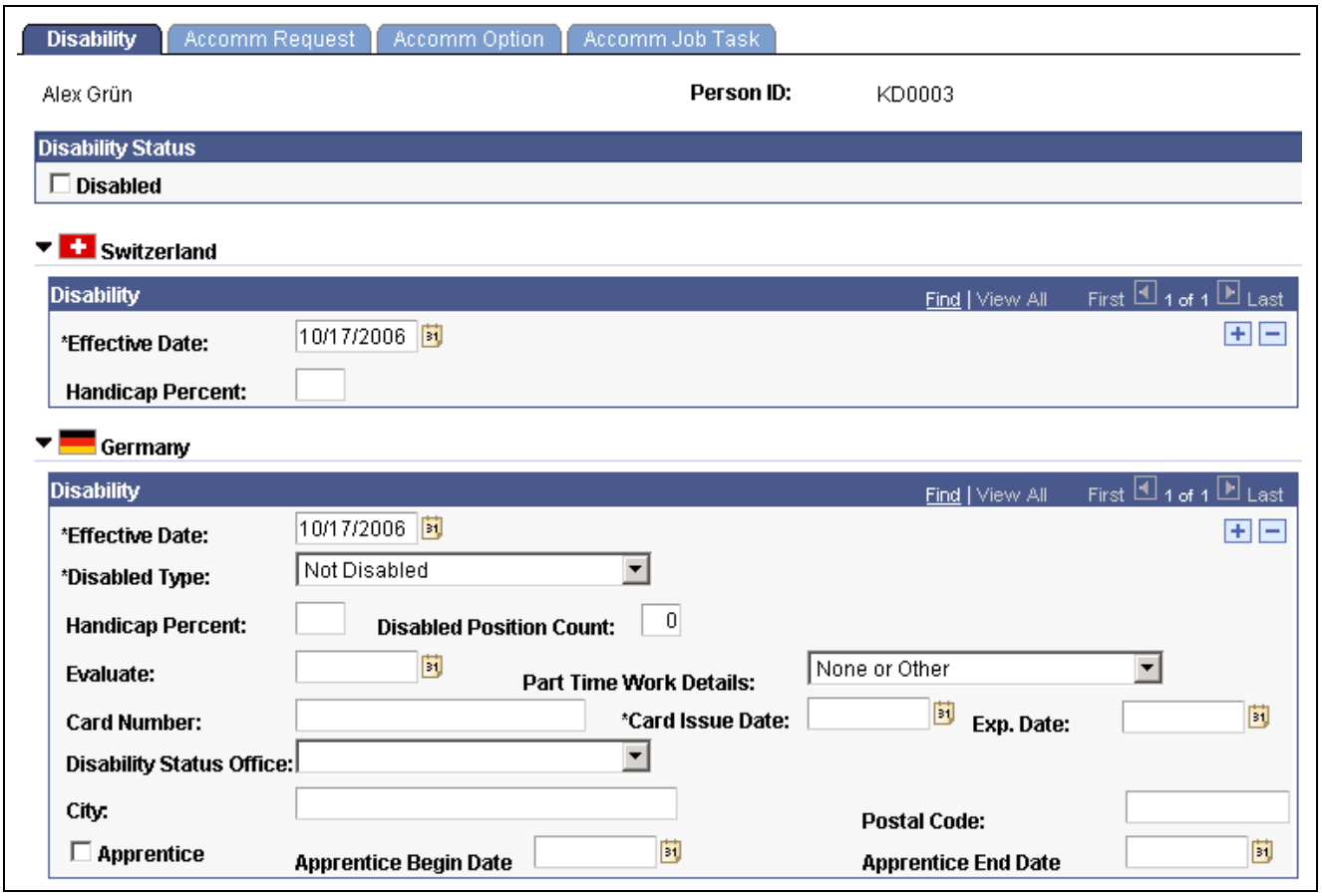
See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements, "(GBR, USA, and USF) Meeting Disability Regulatory Requirements," Managing Accommodation Data

Entering Disability Information

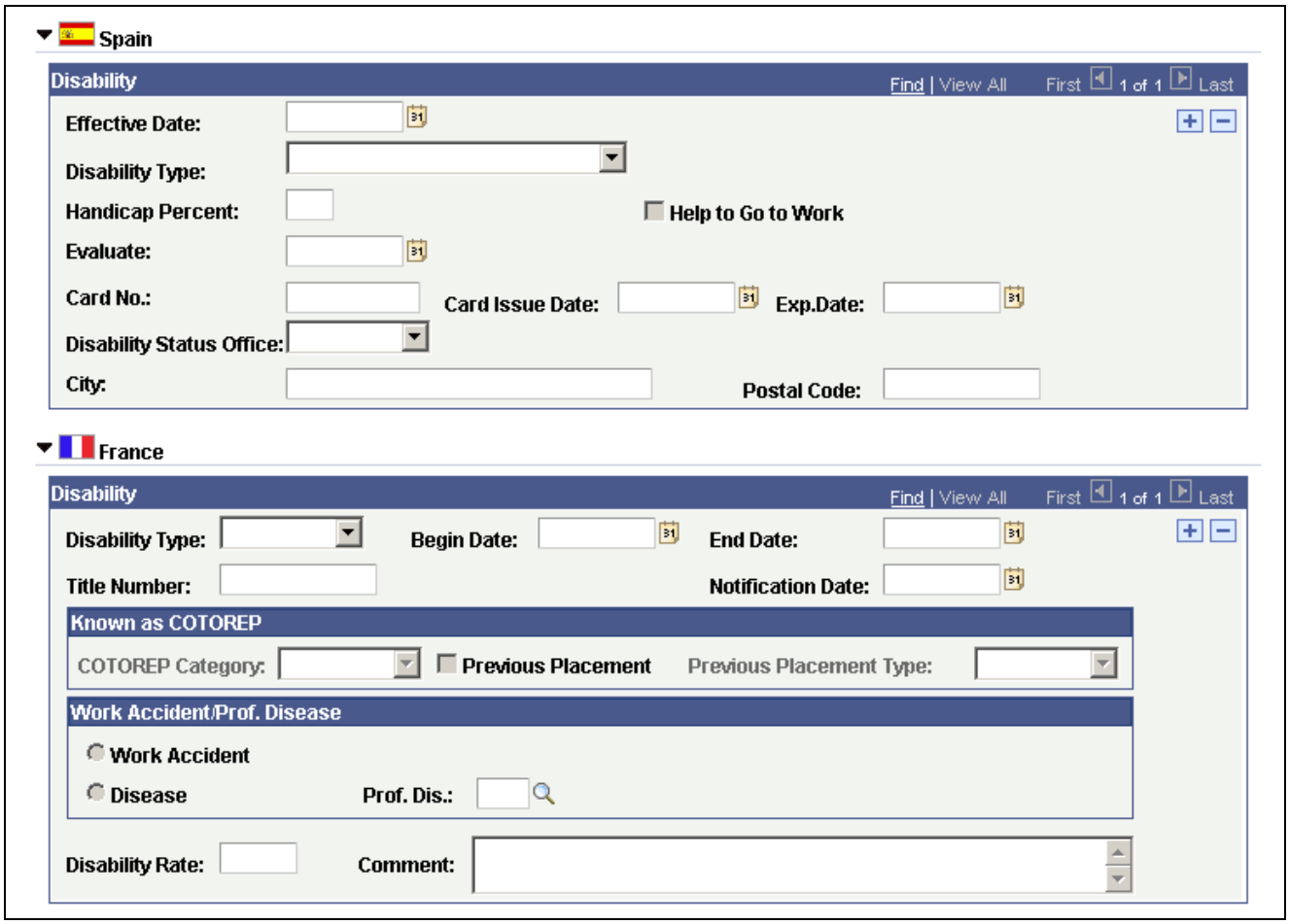
Access the Disability page.

 Copyright © 1988-2006, Oracle. All rights reserved.



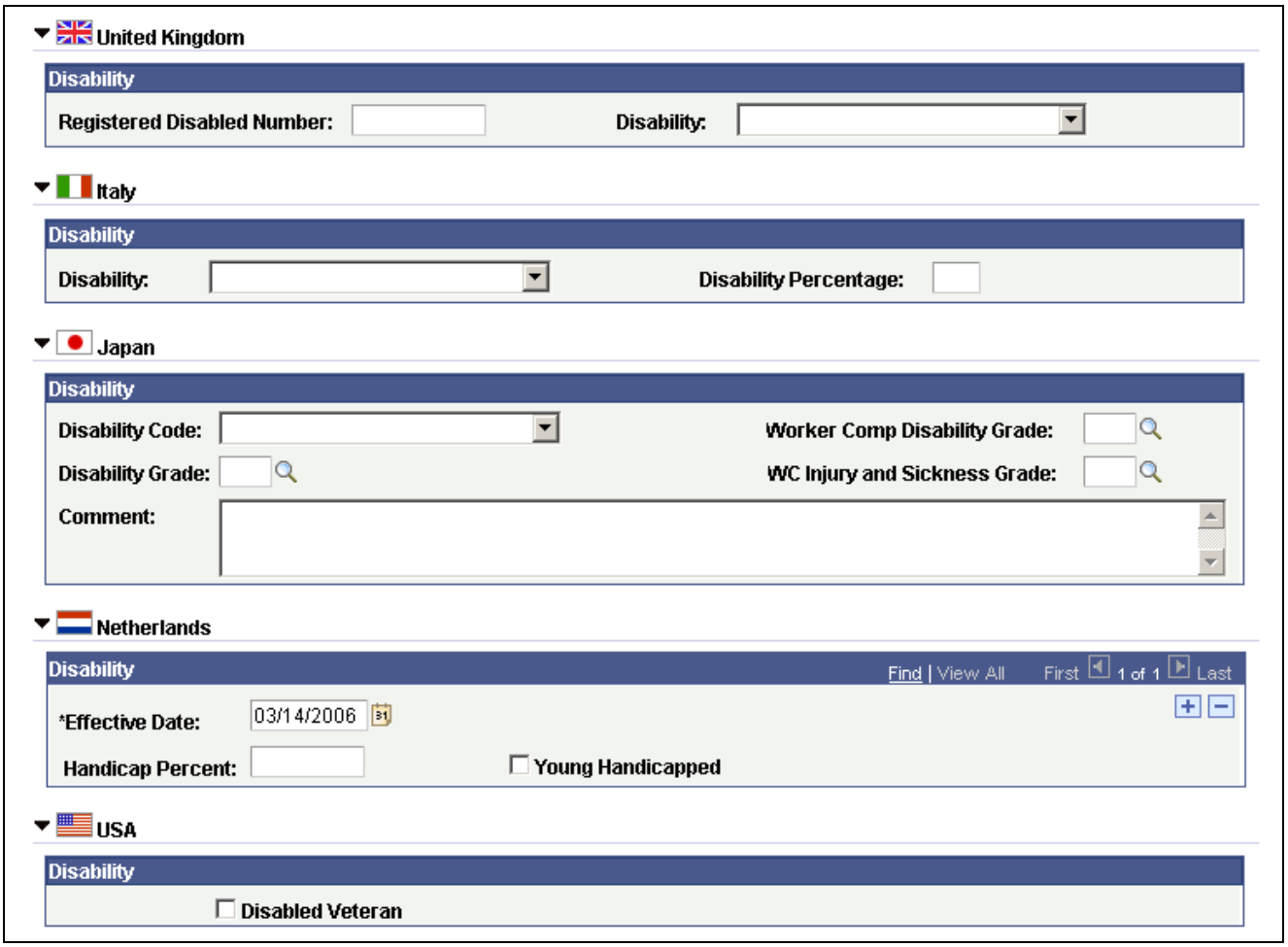
Disability page (1 of 4)

Copyright © 1988-2006, Oracle. All rights reserved.

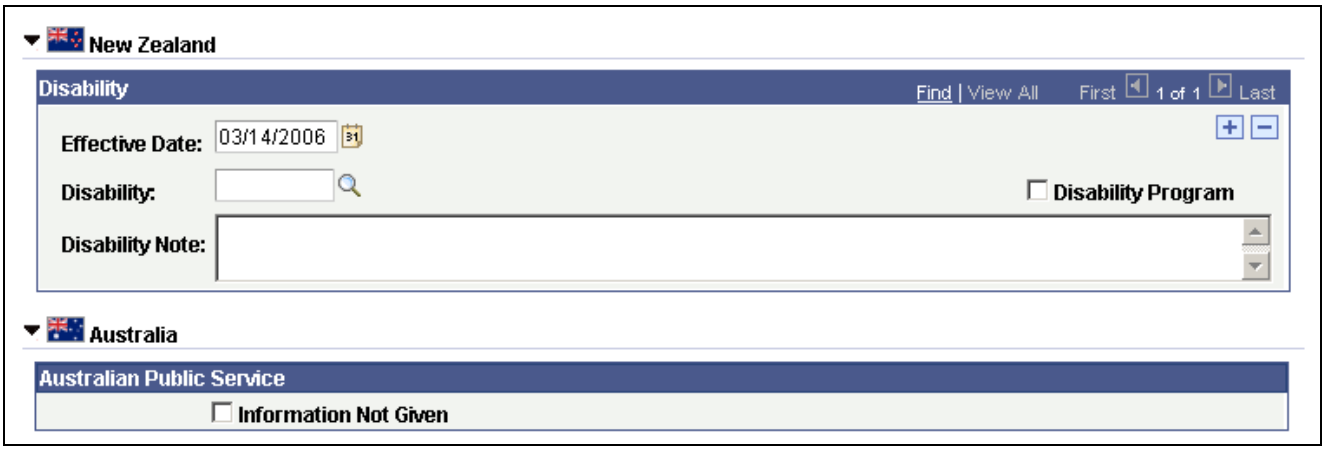


Disability page (2 of 4)

Copyright © 1988-2006, Oracle. All rights reserved.



Disability page (3 of 4)



Disability page (4 of 4)

Track information regarding worker disabilities using the Disability component, which consists of the Disability page and the three Accommodation Data pages. Using these pages, record information regarding disabled workers, and the impact on accommodation requirements for your organization. The information can also be used for regulatory reporting and protecting your organization from claims of disability discrimination.

Disabled Select if the worker is disabled.

Copyright © 1988-2006, Oracle. All rights reserved.

(CHE) Switzerland

Handicap Percent Enter a percentage of disability from *0* to *100*.

(DEU) Germany

Use this group box to track worker disability information that your company needs to demonstrate compliance with the Handicapped Workers Act of 1961. For your company's purposes, the act defines a handicapped person as someone who is registered as handicapped and who is disabled to the degree that it impacts earning capacity. When registered as handicapped, the individual is issued a disability card, and your company must track the disability card number, who issued the card, the issue date, and the expiration date.

Disabled Type Identify the worker's disability type.

Handicap Percent Enter the degree of the disability.

Disabled Position Count Enter the degree to which this worker's disability can be applied to the total number of positions filled by disabled workers. Not every disabled worker may count as a full disabled position.

Evaluate Enter the date that the person's disability was evaluated or reviewed. The evaluation date can be different from the effective date for the disability entry. To maintain a history of evaluation date records, such as past and future evaluations, insert additional data rows and use the scroll bar to navigate between rows.

Part Time Work Details Identify the workers part time work details.

Card Number, Card Issue Date, and **Exp. Date** (disability card number, card issue date, and card expiration date) Enter the worker's disability card number, card issue date, and card expiration date.

Disability Status Office For each disability card, enter the disability status office that issued the card.

City and **Postal Code** Enter the city and postal code of the disability office.

Apprentice Select the check box if the person is or has been an apprentice.

Apprentice Begin Date and **Apprentice End Date** Select the begin and end dates of the apprenticeship.

(ESP) Spain

Disability Type Select a disability type:

- *Non Disability* (none)
- *Physical Disability*
- *Psychological Disability*
- *Sensorial Disability*

Handicap Percent Spanish law requires you to track a disabled worker's percentage of disability. Enter a percentage from *0* to *100*.

Copyright © 1988-2006, Oracle. All rights reserved.

Help to Go to Work Select if the worker needs physical assistance to go to work. This check box is available only to workers whose disability percentage is between 33% and 65%, and is used to calculate a tax deduction for that worker.

Evaluate Enter the date when the disability was evaluated.

Card No. (card number), **Card Issue Date,** and **Exp. Date** (expiration date) The Spanish government issues to people with disabilities a card that certifies their percentage of disability. Enter the card number, the date when the disability card was issued, and the disability card's expiration date.

Disability Status Office Select the office in charge of monitoring the worker's disability status.

City and **Postal Code** Enter the city and postal code of the disability office.

(FRA) France

Use this group box to track worker disability information that your company needs to demonstrate compliance with French regulations regarding disability hiring quotas, and to provide notifications to the disabled worker's social security commission, or *Commission Technique d'Orientation et de Reclassement Professionnel* (COTOREP).

Disability Type Indicate the worker's disability type, which identifies whether the worker is classified by COTOREP as disabled, or instead collects a financial stipend from the social security commission for some other similar reason. These reasons may include widows, orphans, or spouses of a disabled person, and war widows. This information is tracked so that your company can complete the required report of this information in a manner similar to the French Disability report.

Begin Date Enter the date that the disability started.

End Date If the disability wasn't permanent, enter the disability end date.

Title Number Enter the worker's disability number, assigned by COTOREP.

Notification Date Record the date that your company notified the social security commission that you hired the worker.

Disability Rate In the specific case of a disability due to a work accident or a professional disease, the National Social Security Administration (not COTOREP) assigns a percentage of disability to the worker. The purpose of this percentage is to enable a calculation for an allowance that is paid by the National Social Security Administration. A worker can be recognized as a disabled person by COTOREP and also be a victim of a work accident or disease.

When applicable, enter the percentage of disability (*0* to *100* percent).

(FRA) Known as COTOREP

When you open the page, the fields in this group box are display-only. If you select *COTOREP* as the disability type, the fields become available.

COTOREP Category Enter the level of severity of the worker's disability, as defined by the social security commission. Values are:

COTOREP A: Light disability.

COTOREP B: Medium disability.

Copyright © 1988-2006, Oracle. All rights reserved.

COTOREP C: Severe disability.

Previous Placement Select to indicate that the worker had a prior disability placement through COTOREP.

Previous Placement Type If the worker had a previous placement, indicate the previous placement type.

(FRA) Work Accident/Prof. Disease

When you first open the page, the fields in this group box are display-only. If you select *WrkAcc/Dis* (work accident/disabled) as the disability type, the fields become available.

Work Accident and **Disease** Select whether the disability is the result of a work accident or a disease.

Prof. Dis. (professional disease) If the disability is the result of a disease, select the type of disease.

(GBR) UK

Use this group box to track disability data for United Kingdom (UK) workers and to demonstrate compliance with the fair hiring and employment provisions of the Disability Discrimination Act of 1995.

Registered Disabled Number Enter the worker's Registered Disabled Number.

Disability Select the worker's disability type.

(ITA) Italy

Disability Select the worker's disability type.

Disability Percentage Enter the worker's disability percentage, as determined by the examining doctor.

(JPN) Japan

Use this group box to track a worker's disability category and grades. This information is used for regulatory and tax reporting purposes.

Disability Code Enter the worker's disability code (values are legal disability categories that are set by the Ministry of Labor): *Disabled, Heavily disabled, Heavy mental disorder,* and *Mental disorder.*

Worker Comp Disability Grade (workers' compensation disability grade) Select a value from *Grade 1* through *Grade 14.*

Disability Grade Select a value from *Grade 1* through *Grade 7.*

WC Injury and Sickness Grade (workers' compensation injury and sickness grade) Select a value from *Grade 1* through *Grade 3.*

Copyright © 1988-2006, Oracle. All rights reserved.

(NLD) Netherlands

Use this group box to record disability information for your workforce, and then use this information to document compliance with regulations under the Disabled Employees Act of 1985 (*Wet Arbeid Gehandicapte Werknemers*).

Handicap Percent Enter the percentage degree to which the worker is handicapped.

Young Handicapped Select to indicate that the worker qualifies for the tax reduction rule for young handicapped people (*Wet arbeidsongeschiktheidsvoorziening jonggehandicapten, Wajong*).

(USA) USA

Disabled Veteran Select only if the worker is a disabled veteran.

(NZL) New Zealand

Disability Select the worker's disability type. These values come from the NZL Disability table.

Disability Program Select if there is an association between the worker and a disability program.

Disability Note Enter additional comments about the disability.

(AUS) Australia

Information Not Given Select if worker disability information is not provided.

Documenting Disability Accommodations

Use the three accommodation data pages—Accomm Request, Accomm Option, and Accomm Job Task—to document that your company doesn't have discriminatory practices against people with disabilities. When workers or applicants request that you make accommodations to enable them to perform job tasks, you can track all the steps that are involved in resolving those requests.

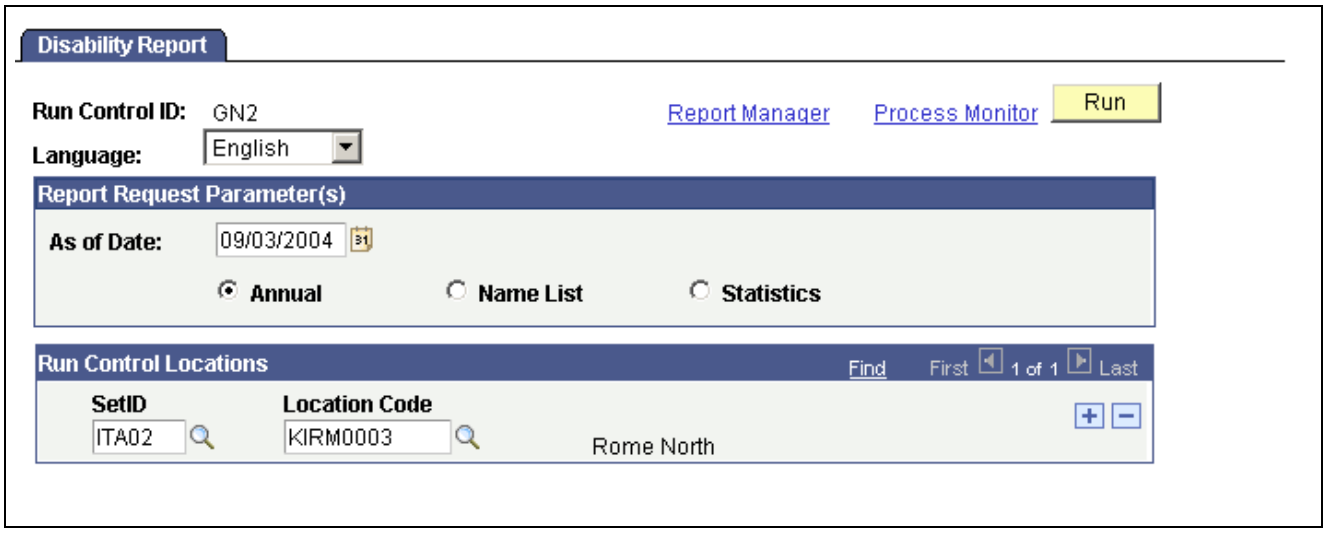
See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements, "(GBR, USA, and USF) Meeting Disability Regulatory Requirements," Managing Accommodation Data

(ITA) Running the ITA Disability Report

Access the Disability Report page.

Copyright © 1988-2006, Oracle. All rights reserved.



Disability Report page

Annual Select this option if you want to run the annual report, which lists the number of disabled workers sorted by disability type and gender.

Name List Select this option if you want to run the report that lists the names of disabled workers by location and gender.

Statistics Select this option if you want to run the report that lists locations and the number of disabled and able-bodied workers. Part and full-time disabled workers are counted as one. Part-time, able-bodied workers are counted using their full time equivalent (FTE) value. If an able-bodied employee has an FTE value of 0.5, then that employee is counted as 0.5 on this report. Full-time, able-bodied workers are counted as 1.

SetID Select the setID of the company for which you are reporting disability statistics.

Location Code Select the location code of the location for which you are reporting disability statistics.

Handling Company Credit Cards

In PeopleSoft Enterprise Human Resources, you can identify company credit cards and then assign those cards to employees.

This section provides an overview of credit card encryption, lists prerequisites, and discusses how to:

- Enter credit card vendors.
- Assign cards to workers.
- Encrypt preexisting credit card numbers.

Copyright © 1988-2006, Oracle. All rights reserved.

Understanding Credit Card Encryption

PeopleSoft Enterprise Human Resources uses PeopleTools Pluggable Cryptography framework and encryption/decryption profiles (called encryption schemes) to encrypt and decrypt all credit card numbers stored in the database.

PeopleTools Pluggable Cryptography is an advanced security framework that provides a security model for applications to encrypt credit card data. Pluggable Cryptography provides a way for you to secure critical PeopleSoft data and communicate securely with other businesses. It enables you to extend and improve cryptographic support for your data in PeopleTools, giving you strong cryptography with the flexibility to change and grow, by incrementally acquiring stronger and more diverse algorithms for encrypting data. In PeopleTools, pluggable cryptography capability is provided by PeopleSoft pluggable encryption technology (PET).

By using the PeopleTools Pluggable Cryptography for strong encryption/decryption, the Human Resources system encrypts data using 3DES algorithms and 168-bit encryption keys. The system displays an *X* in place of each credit card number other than the last four digits. This includes credit card numbers that are display-only as well as those that are editable. The system encrypts all credit card numbers as soon as they are entered into the system on the Maintain Employee Credit Card Data page.

Use of the stronger Credit Card Encryption solution supports compliance with the cardholder data protection requirements of the Payment Card Industry (PCI) Data Security Standard and with Visa's Cardholder Information Security Program (CISP).

PeopleSoft Enterprise Human Resources delivers the system data necessary for credit card encryption. Encryption of credit card numbers within the Human Resources system requires no additional setup.

Note. When the system publishes any messages that contain a credit card number (such as the CORPORATE_CARD_DATA_SYNC message) the systems uses clear text rather than encrypted data for the credit card number because the message is being sent via a secured queue. The secured queue likewise meets the requirement of the PCI Data Security Standard. The message CORPORATE_CARD_DATA_FULLSYNC also comes delivered but is not implemented in the system. To use this message you must write code to decrypt the credit card number before publishing the message.

See Also

Enterprise PeopleTools PeopleBook: Security Administration, "Securing Data with Pluggable Cryptography"

Prerequisite

You must have defined credit card types on the Translate table before entering credit card vendors.

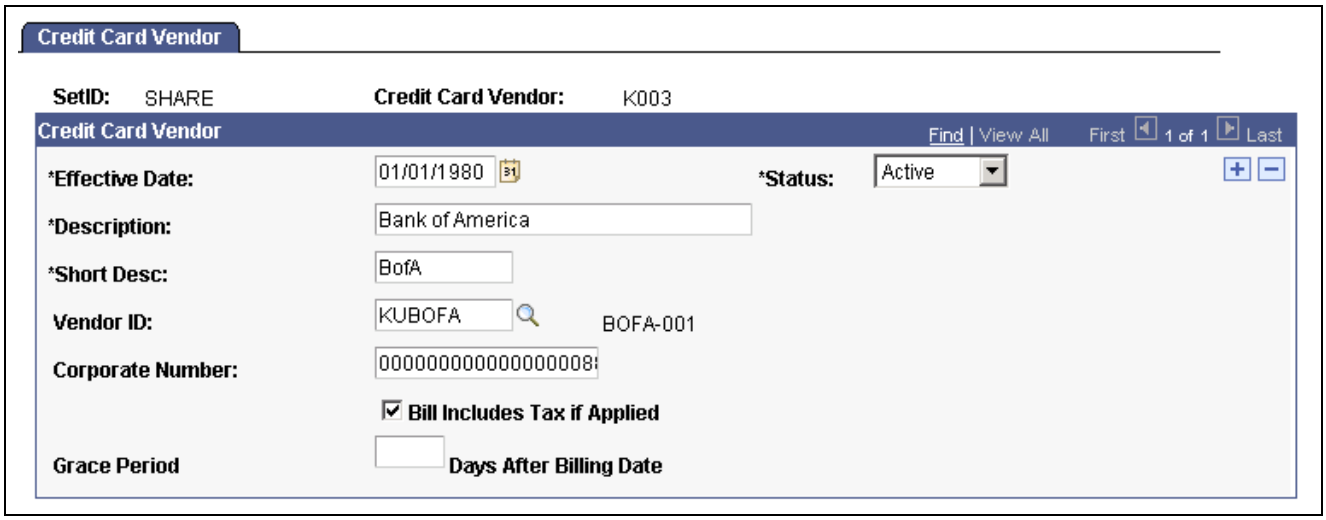
Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Handle Company Credit Cards

Page Name	Object Name	Navigation	Usage
Credit Card Vendor	CC_CARD_TBL	Set Up HRMS, Product Related, Workforce Administration, Credit Card Vendors, Credit Card Vendor	Enter vendors of credit cards that you'll assign to workers. A vendor that you identify here can be linked to an actual vendor in the Accounts Payable Vendor table.
Maintain Employee Credit Card Data	CC_CARD_DATA	Workforce Administration, Job Information, Credit Card, Maintain Employee Credit Card Data	Assign company credit cards to workers.
Process Credit Card Data Encryption	CC_ENCRYPT_CRD_NBR	Set Up HRMS, System Administration, Utilities, Encrypt Credit Card Number, Process Credit Card Data Encryption	Encrypt preexisting credit card numbers according to the latest encryption standards of the system.

Entering Credit Card Vendors

Access the Credit Card Vendor page.



Credit Card Vendor page

Vendor ID Enter the vendor ID.

Corporate Number Enter your company's corporate number. This isn't a credit card number.

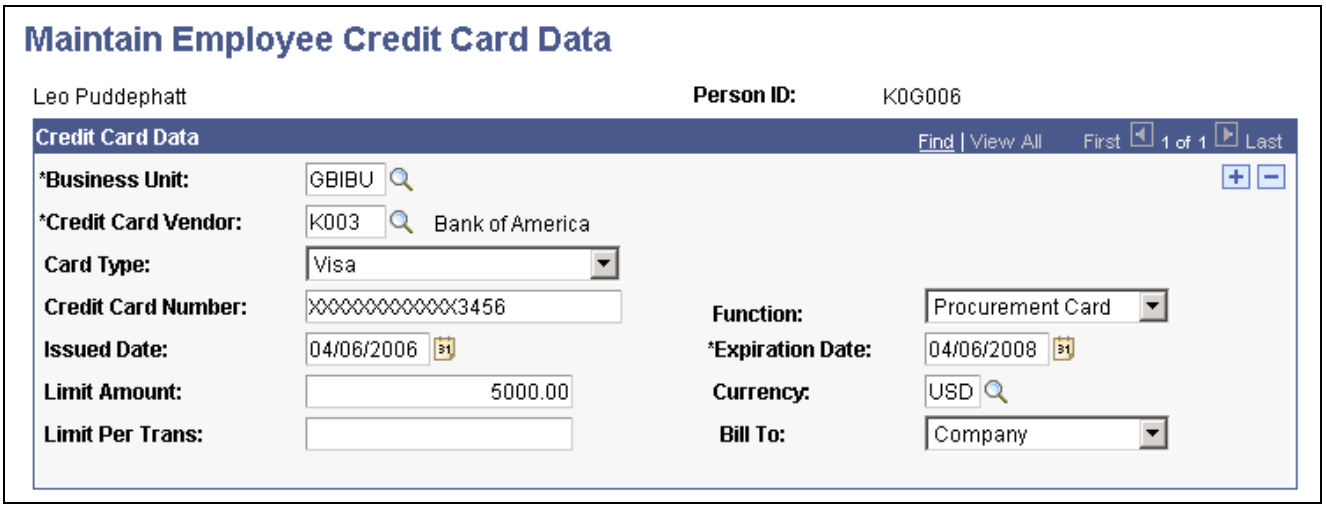
Bill Includes Tax if Applied Select if the bill includes tax.

Grace Period and **Days After Billing Date** Enter the number of days allowable after the billing date to avoid additional charges.

Assigning Cards to Workers

Access the Maintain Employee Credit Card Data page.

Copyright © 1988-2006, Oracle. All rights reserved.



Maintain Employee Credit Card Data page

Credit Card Vendor Select the card's vendor.

Card Type Select the card type.

Credit Card Number Enter the card number. The system masks the credit card number except for the last four digits. The masking of the credit card number is visible only after saving the data and then accessing the page again for that employee. To update an existing credit card number you must delete the existing number and enter the new number in its entirety, even if you are only modifying the last four digits.

See Chapter 8, "Entering Additional Data in Human Resources Records," Understanding Credit Card Encryption, page 309.

Function Select the main function for this card (for example, debit card, phone card, or corporate card).

Issued Date (date issued) Enter the date that the card was issued.

Expiration Date Enter the date that the card expires.

Limit Amount Enter the credit card limit amount.

Curreny Enter the currency of the credit card.

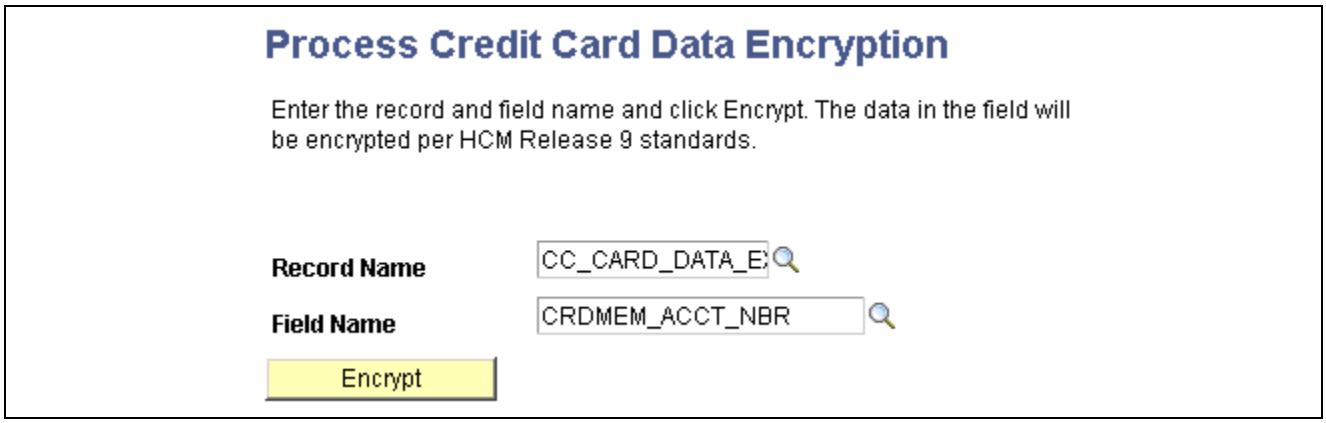
Limit Per Trans (limit per transaction) Enter the limit amount per transaction.

Bill To Select whom to bill for this credit card.

Encrypting Preexisting Credit Card Numbers

Access the Process Credit Card Data Encryption page.

Copyright © 1988-2006, Oracle. All rights reserved.



Process Credit Card Data Encryption page

Note. Run this process one time to encrypt preexisting credit card numbers only if you have unsecured data in the Credit Card Number field on the Maintain Employee Credit Card Data page .

Record Name Select the record that contains the field for which you want to encrypt preexisting data with the system's latest encryption standards. To encrypt prexisting credit card numbers found on the Maintain Employee Credit Card Data page, select the *CC_CARD_DATA_EX* record.

Field Name Select the field (within the selected record) for which you want to encrypt preexisting data with the system's latest encryption standards. To encrypt prexisting credit card numbers found on the Maintain Employee Credit Card Data page, select the *CRDMEM_ACCT_NBR* field.

Encrpyt Click this button to encrpyt the preexisting data for the selected field.

Handling Company Property

To set up the handling of company property, use the Company Property (COMPANY_PROP_TBL) component.

This section discusses how to:

- Identify company property.
- Assign values to company property.
- Assign company property to workers.

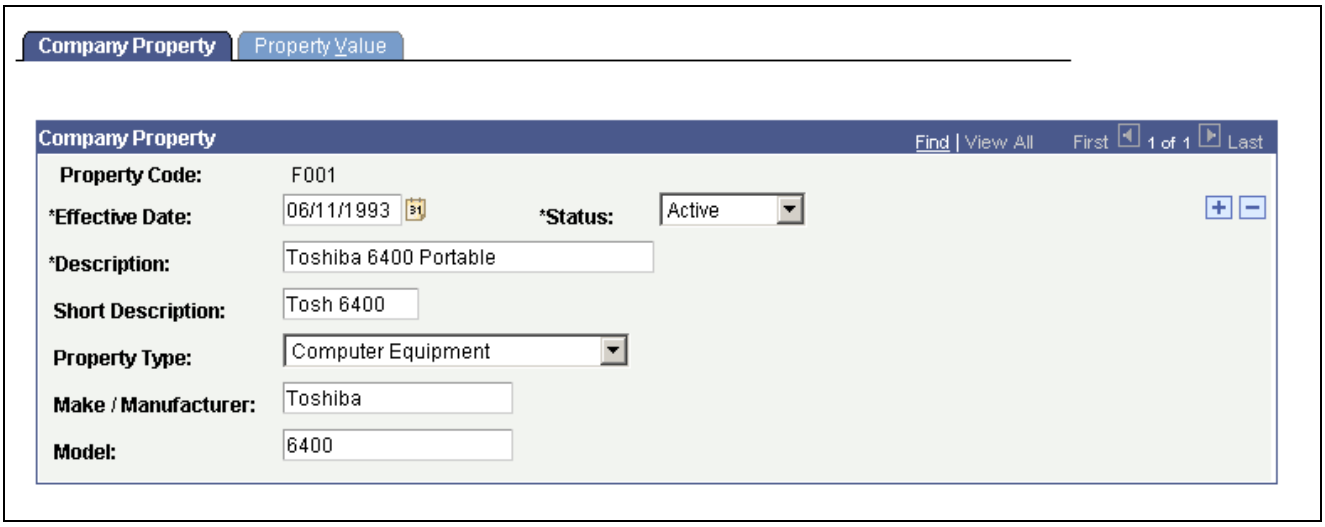
 Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Handle Company Property

Page Name	Object Name	Navigation	Usage
Company Property - Company Property	COMPANY_PROP_TBL1	Set Up HRMS, Product Related, Workforce Administration, Company Property, Company Property	Identify company property, such as vehicles, computer equipment, tools, or uniforms.
Property Value	COMPANY_PROP_TBL2	Set Up HRMS, Product Related, Workforce Administration, Company Property, Property Value	Assign values to company property.
Job Information - Company Property	COMPANY_PROPERTY	Workforce Administration, Job Information, Company Property	Assign company property to workers.

Identifying Company Property

Access the Company Property - Company Property page.



Company Property - Company Property page

Property Code Displays the property code for this item.

Property Type Select a type of property, such as *Vehicle* or *Computer Equipment.*

Make/Manufacturer Enter the make and manufacturer for this item.

Model Enter the model.

Car Identification

If you select *Vehicle* as the property type, this group box appears in place of the Make/Manufacturer and Model fields.

Car Identification When you enter a car ID, the system automatically completes the Registration Number, Make/Model, and Color fields based on the values stored for that car ID.

Copyright © 1988-2006, Oracle. All rights reserved.

Make/Model Enter the make and model for this car.

Registration Number Enter the car's registration number.

Color Enter the car's color.

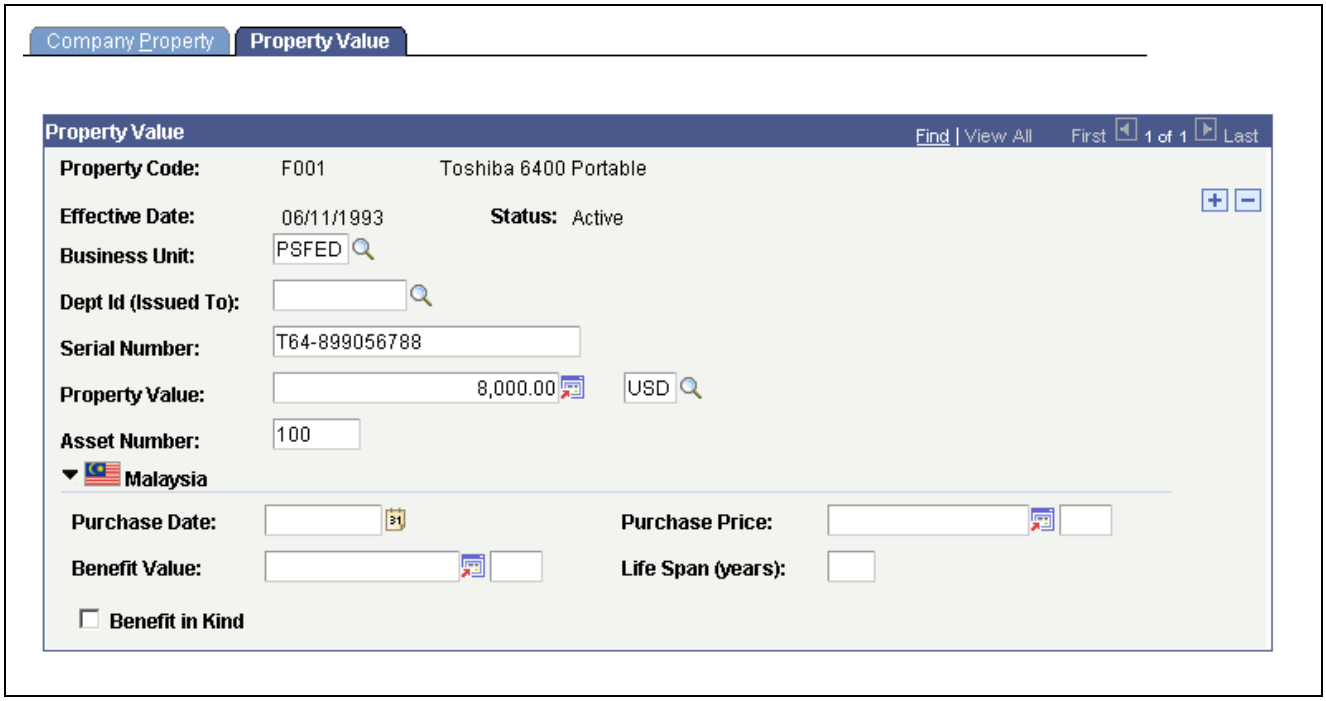
See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Company Cars, "Getting Started with Administer Company Cars"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Monitor Health and Safety, "Tracking Personal Data for People Involved in Incidents," Entering Non-Employee Data

Assigning Values to Company Property

Access the Property Value page.



Property Value page

Dept ID (Issued To) Enter the identification number of the department to which the property was issued.

Serial Number Enter the serial number.

Property Value Enter the value of the property and the currency that you are using.

Asset Number Enter the asset number.

(MAL) Malaysia

Purchase Date Enter the date the company property was purchased.

Purchase Price Enter the purchase price.

Copyright © 1988-2006, Oracle. All rights reserved.

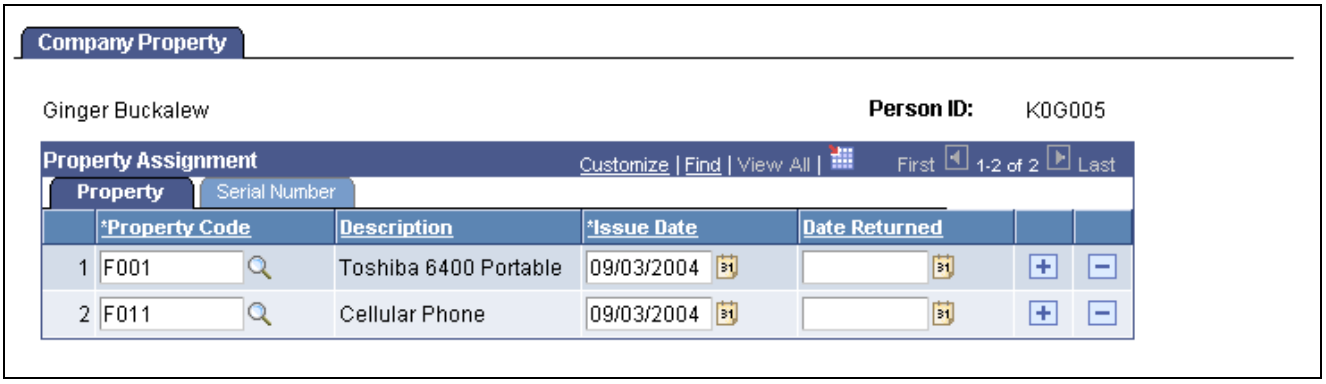
Benefit Value Enter the value of the benefit to be used in calculations

Life Span (years) Enter the number of years expected for the life span of the company property.

Benefit in Kind Select to specify if this property is a Benefit in Kind (BIK)

Assigning Company Property to Workers

Access the Job Information - Company Property page.



Job Information - Company Property page

Property Code Enter the property code for the item that you've assigned to the worker.

Issue Date Enter the date that you issued the property to the worker.

Date Returned After the worker returns the property, enter the date that it was returned.

Serial Number The system displays the serial number of the item that you've assigned to the worker.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Monitor Health and Safety, "Tracking Personal Data for People Involved in Incidents," Entering Non-Employee Data

Tracking Dependent and Beneficiary Data

This section provides an overview of dependent and beneficiary data and discusses how to:

- Enter dependent and beneficiary name information.
- Enter dependent address information.
- Enter dependent and beneficiary information.
- Enter information about court-ordered benefits for dependents.
- (NLD) View an employee's dependents and beneficiaries.
- Enter dependent citizenship and passport information.
- Enter dependent visa and permit data.

Copyright © 1988-2006, Oracle. All rights reserved.

Understanding Dependent and Beneficiary Data

Use the Dependent Information component to record important information for dependents that may accompany an employee on an international assignment or international travel. You must also have these pages set up prior to enrolling employees in specific benefit programs.

The Name and Address pages define the relationship of the person to the employee and determine whether the person is a dependent, beneficiary, or both. This definition affects the person's eligibility to be enrolled in health benefits or to be assigned as a beneficiary in certain benefit plans.

The Personal Profile page defines the personal information about the person. This data also affects whether the person is eligible for benefits.

Pages Used to Track Dependent Identification Data

Page Name	Object Name	Navigation	Usage
Name	DEPEND_BENEF1	• Workforce Administration, Personal Information, Personal Relationships, Dependent Information, Name • Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Name	Enter or update information about a dependent's name.
Address	DEPEND_BENEF_ADDR	• Workforce Administration, Personal Information, Personal Relationships, Dependent Information, Address • Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Address	Enter or update information about a dependent's address.
Personal Profile	DEPEND_BENEF2	• Workforce Administration, Personal Information, Personal Relationships, Dependent Information, Personal Profile • Workforce Administration, Global Assignments, Track Assignment, Dependent Data, Personal Profile	Enter or update information about a dependent.
Dependent/Beneficiary Riders	DEPBEN_RIDERS	Click Riders/Orders on the Dependent Information - Personal Profile page.	Enter detailed information about the court-ordered benefit for the specified dependent or beneficiary.

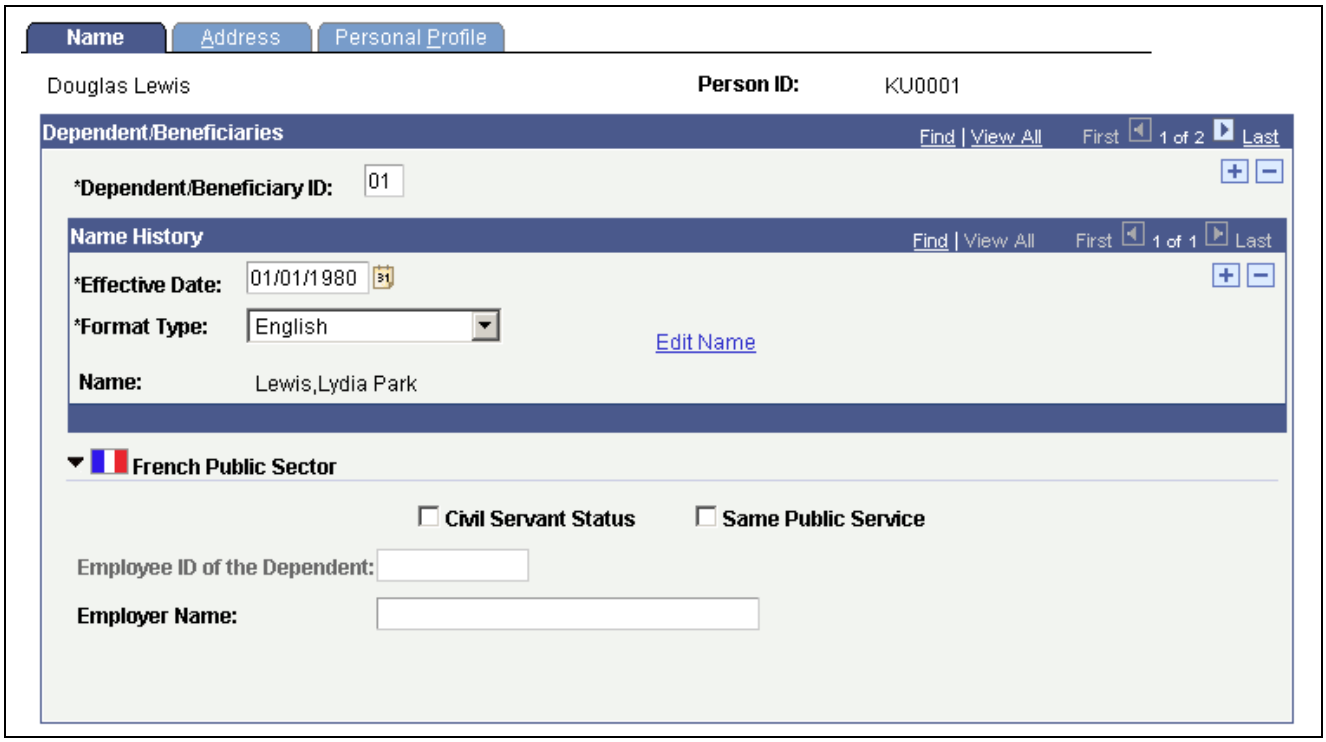
Copyright © 1988-2006, Oracle. All rights reserved.

Page Name	Object Name	Navigation	Usage
Personal Profile: Phone Numbers	DEP_BENEF_PHON_SEC	Click Phone Numbers on the Dependent Information - Personal Profile page.	Enter additional dependent and beneficiary phone numbers.
Dependent/Benef	DEPEND_BENEF_SUMM	• Workforce Administration, Benefit Information NLD, Review Benefits, Dependent/Beneficiary Summary, Dependent/Benef • Benefits, Employee/Dependent Information, Review Dep/Ben Summary, Dependent/Benef	View an employee's beneficiaries and dependents.
Depdnt Identification Details - Depdnt Citizenship/Passport	CITIZEN_PP_DEP	Workforce Administration, Personal Information, Personal Relationships, Depdnt Identification Details, Depdnt Citizenship/Passport	Enter or update dependent citizenship and passport data.
Depdnt Identification Details - Depdnt Visa/Permit Data	VISA_PERMIT_DEP	Workforce Administration, Personal Information, Depdnt Identification Details, Depdnt Visa/Permit Data	Enter or update dependent visa and permit data.

Entering Dependent and Beneficiary Name Information

Access the Dependent Information - Name page.

Copyright © 1988-2006, Oracle. All rights reserved.



Dependent Information - Name page

The system displays the name and the employee ID for the employee.

Dependent/Beneficiary ID The system assigns the dependent or beneficiary ID. You can change it, although you can't have duplicate IDs for dependents or beneficiaries of the same employee. You can, however, use these same IDs for a different employee's dependents and beneficiaries.

Effective Date The system enters the current system date in this field, and this date is carried through to all pages of the component. You can change this date if necessary, however in the first row of data for this dependent/beneficiary, the effective date must be the same on all of the pages in this component.

Edit Name Click to access the Edit Name page. On this page, enter the dependents name and click Refresh to update the fields that display the dependents' name.

Note. When running a calculation, the system determines if an employee is married by reviewing the dependent and beneficiary table to determine whether there is a dependent identified as the spouse. It is possible for the dependent and beneficiary pages to show more than one spouse, to show a former spouse as a current spouse, to show no spouse even if the employee's marital status is married, or to show a spouse even though the employee's marital status is single. These and other inconsistencies in the dependent and beneficiary data can cause problems with pension calculations. It is best to verify dependent and beneficiary information when calculating pension benefits.

(FRA) French Public Sector

Civil Servant Status Select to indicate that this dependent is a civil servant.

Same Public Service Select if the dependent is in the same public service as the employee.

Copyright © 1988-2006, Oracle. All rights reserved.

Employee ID of the Dependent When the Same Public Service field is selected, this field is editable. Select the Employee ID of the dependent that is in the same public service as the employee.

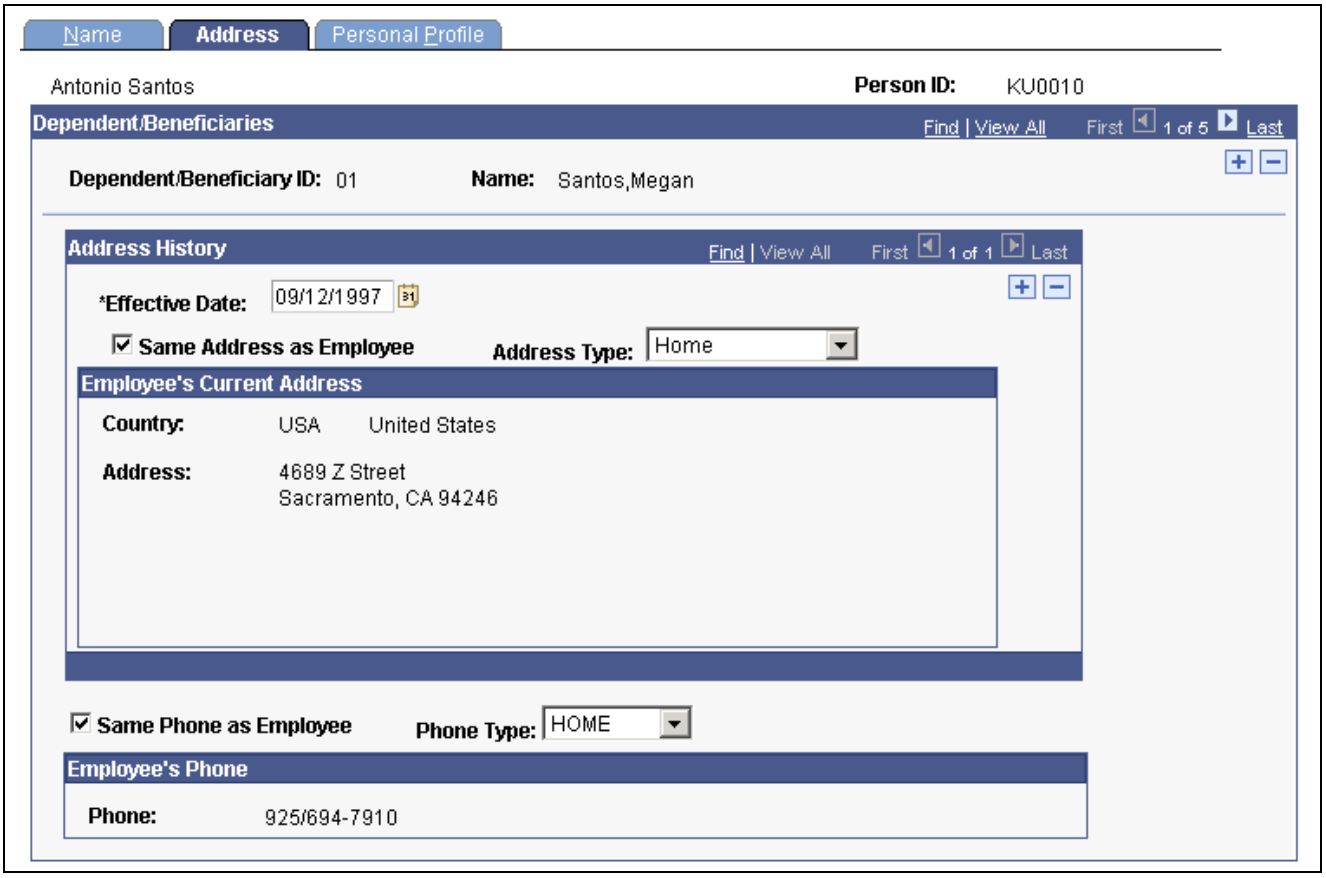
Employer Name Enter the employer name of the dependent.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Benefits, "Entering Dependent and Beneficiary Information," Entering Dependent and Beneficiary Information

Entering Dependent Address Information

Access the Dependent Information - Address page.



Dependent Information - Address page

The employee's name and employee ID, as well as this dependent or beneficiary's ID, relationship to the employee, and dependent or beneficiary type appear at the top of the page.

Same Address as Employee and **Address Type** Select if the dependent has the same address information as the employee, and then select the employee's address type that matches the dependent or beneficiary's address. If selected, you don't need to complete any of the address fields.

Same Phone as Employee and **Phone Type** Select if the dependent has the same phone information as the employee and then select the employee phone type that is the same as this beneficiary's. If

Copyright © 1988-2006, Oracle. All rights reserved.

selected, you don't need to complete any of the phone fields. A beneficiary can have the same address as the employee but a different phone number.

Edit Address Click to enter or edit the dependent's contact address information.

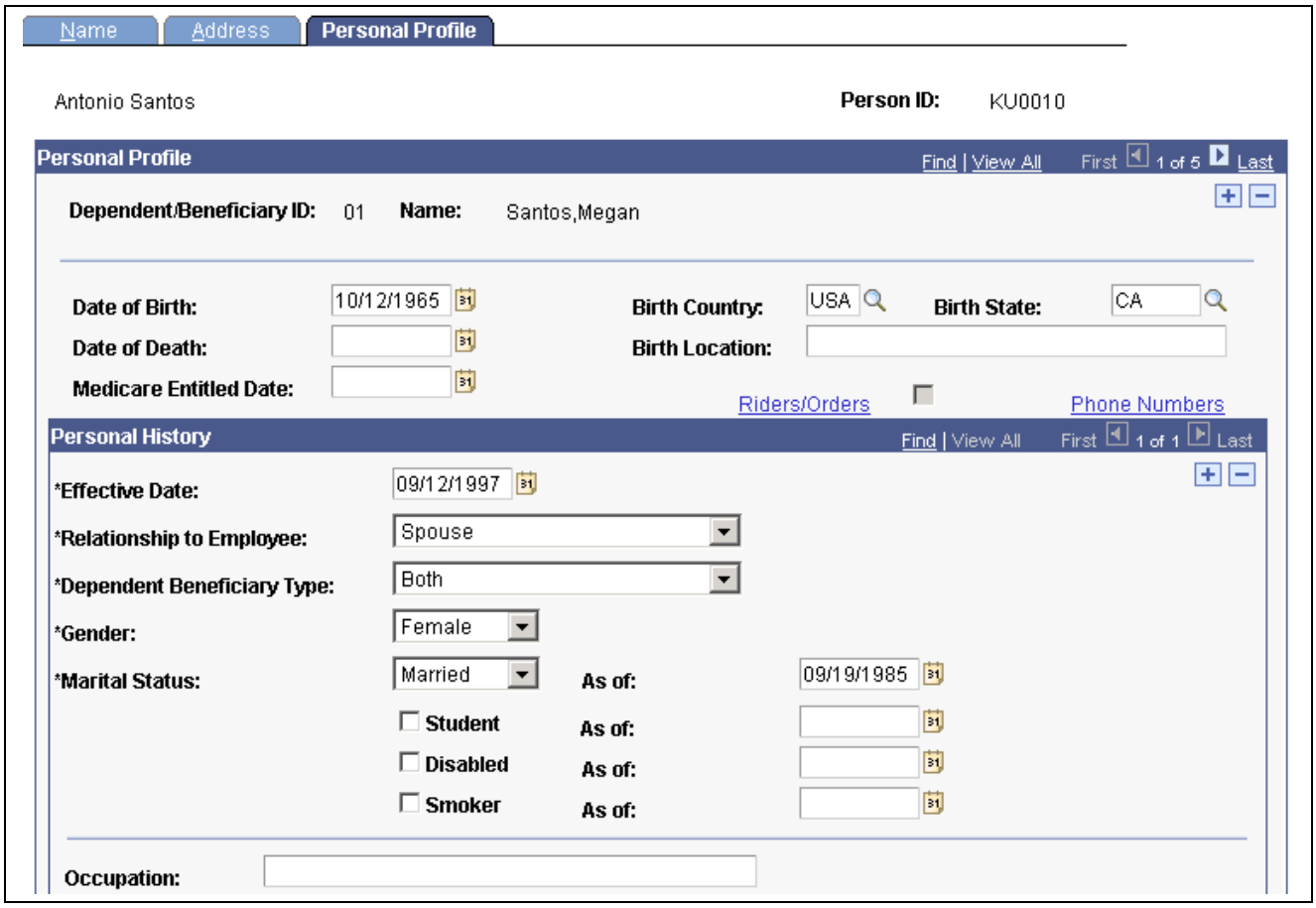
Contact Phone Enter the dependent's contact phone information in this group box.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up Local Country Functionality," (NLD) Loading Dutch Postal Codes

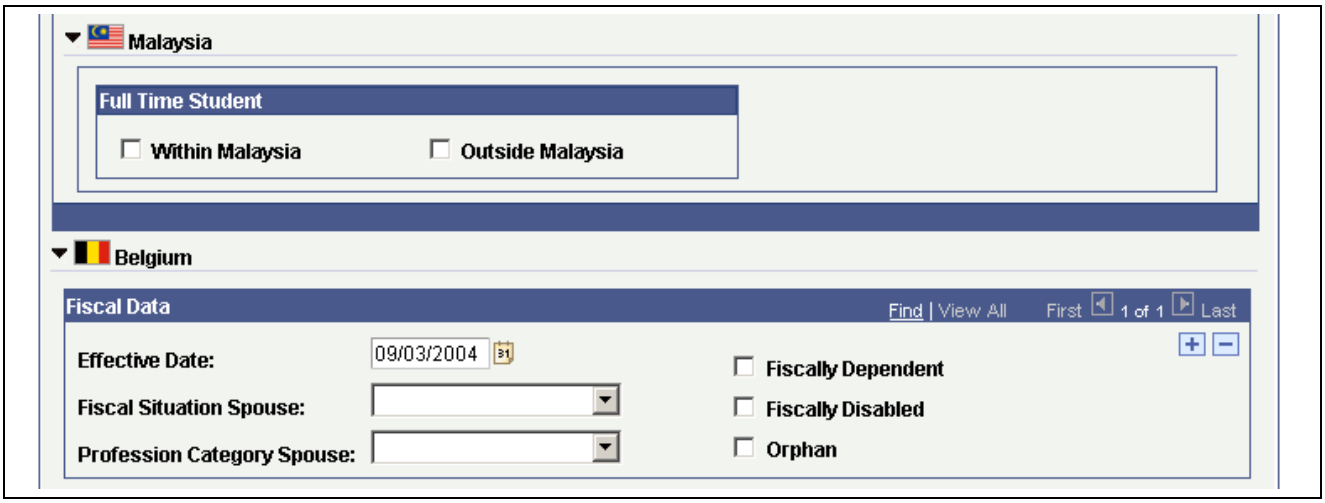
Entering Dependent and Beneficiary Information

Access the Dependent Information - Personal Profile page.

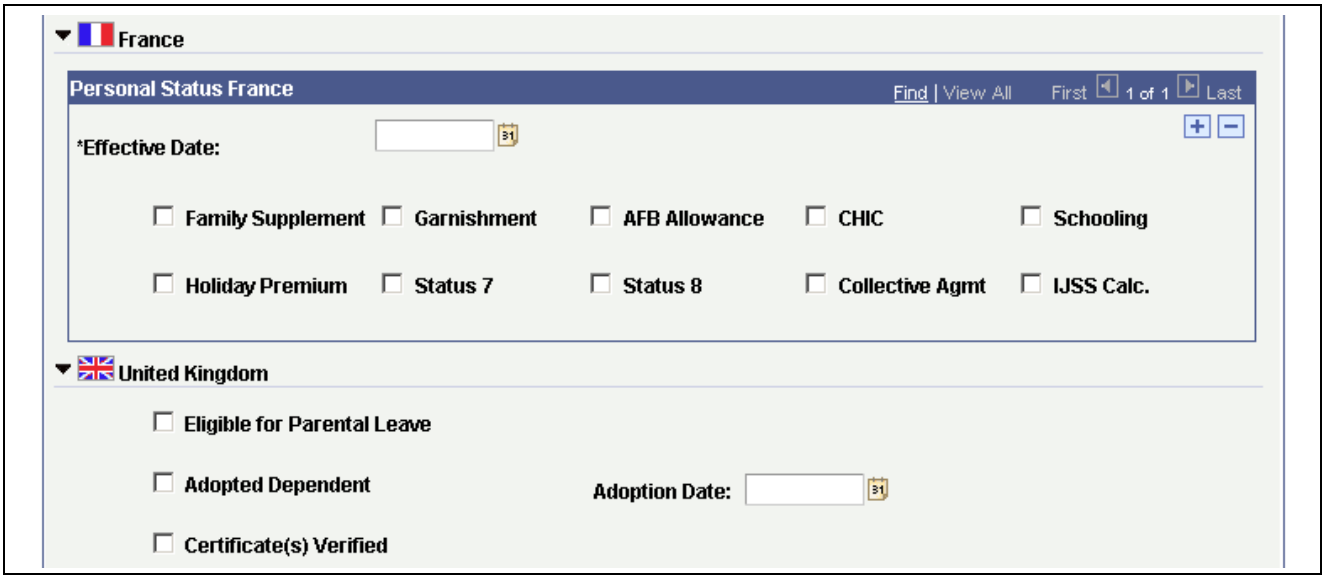


Dependent Information - Personal Profile page (1 of 5)

Copyright © 1988-2006, Oracle. All rights reserved.

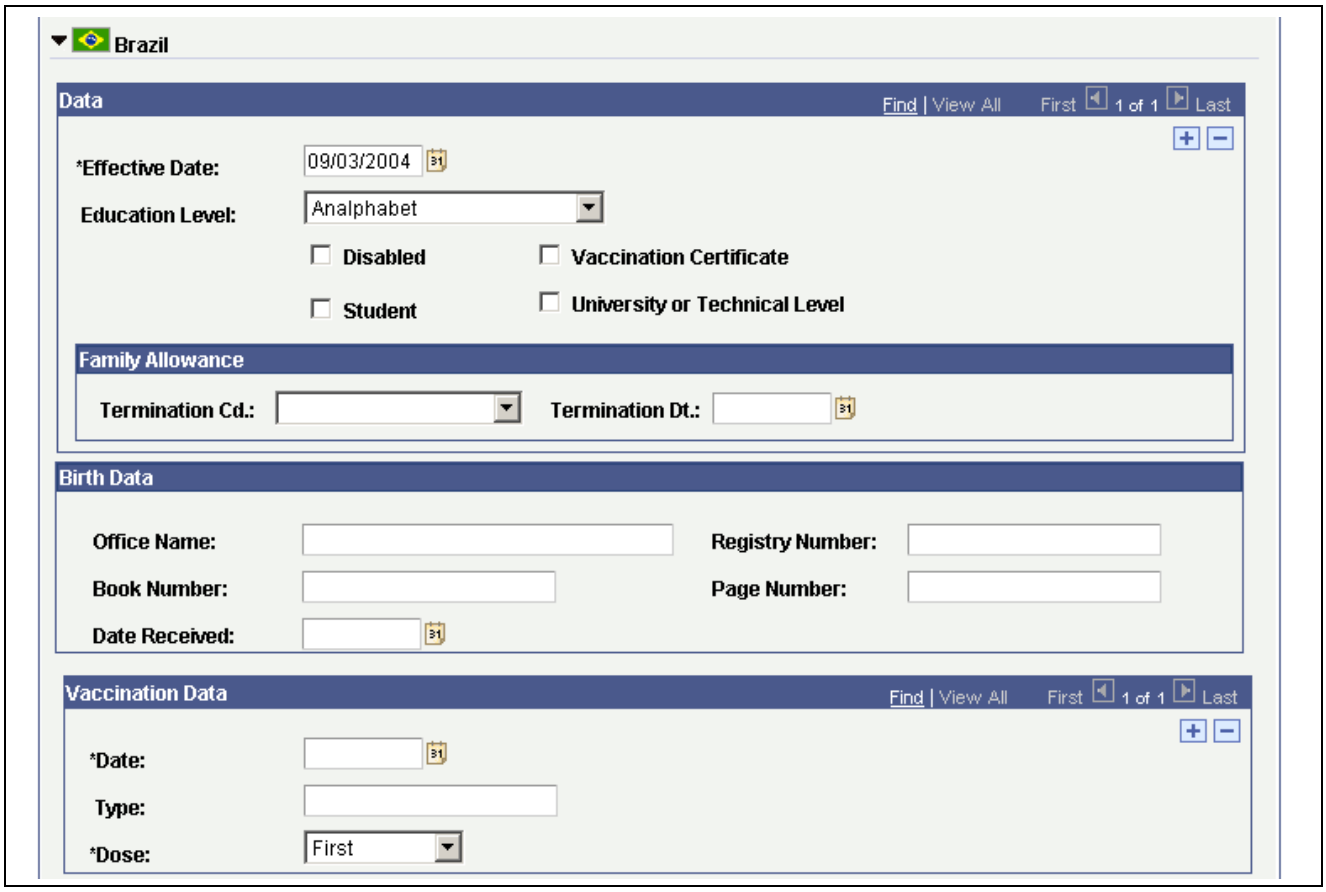


Dependent Information - Personal Profile page (2 of 5)

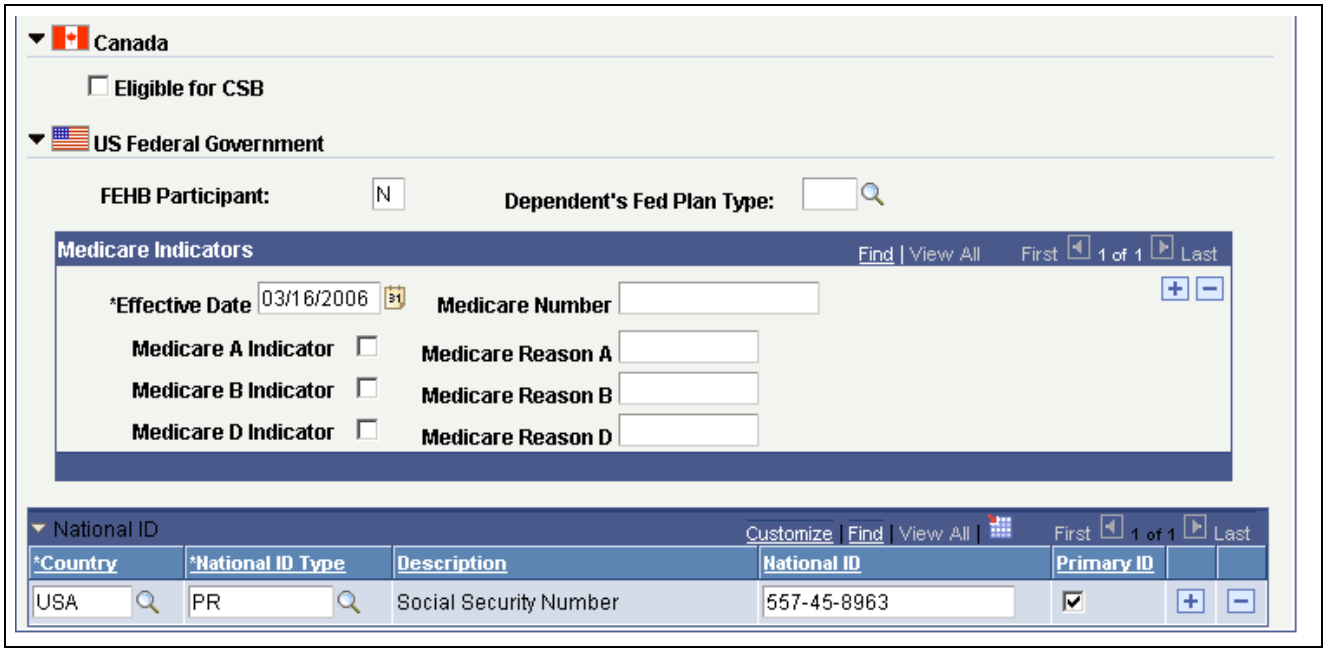


Dependent Information - Personal Profile page (3 of 5)

Copyright © 1988-2006, Oracle. All rights reserved.



Dependent Information - Personal Profile page (4 of 5)



Dependent Information - Personal Profile page (5 of 5)

Date of Birth Enter the dependent or beneficiary's birthdate. Certain benefit plans, such as life insurance, require the birthdate to determine an individual's eligibility.

Copyright © 1988-2006, Oracle. All rights reserved.

Birth Country Enter the country in which the dependent or beneficiary was born. Depending on the country you enter, additional fields may appear that require more data entry.

Date of Death When the dependent or beneficiary dies, enter the date of the death.

Birth Location Enter a city, county, or both, to further define the place in which the dependent or beneficiary was born.

Medicare Entitled Date Enter the date on which the dependent or beneficiary will become eligible for Medicare coverage.

Riders/Orders Click to access the Dependent/Beneficiary Riders page.

Phone Numbers Click to access the Dependent Information - Personal Profile: Phone Numbers page.

Relationship to Employee Enter the dependent or beneficiary's relationship to the employee. If you've set up the Dependent Relationship table, the system automatically completes the Relationship to Employee field according to the relationships in the table.

Dependent Beneficiary Type Select the type of dependent or beneficiary. Your selection determines whether you can enroll this person into a benefit plan as a dependent or assign this person as a beneficiary.

If you have set up the Dependent Relationship table, the system uses that information to populate and validate this field. Values are:

Beneficiary: Beneficiary only.

Both: Dependent and beneficiary. If you plan to enroll the person as a dependent *and* assign the person as a beneficiary, you must select this option.

COBRA Dependent Only: COBRA dependent or beneficiary only.

Dependent: Dependent only.

None: The person is neither a dependent nor a beneficiary. This option is typically used when the person is a co-owner of a U.S. savings bond, or to make a person ineligible to participate in a benefit plan.

QDRO Estate: If the beneficiary of a life plan is the estate of an employee, enter this value.

QDRO Representative - Employee: Used for PeopleSoft Enterprise Pension Administration.

QDRO Representative - Recipient: Used for PeopleSoft Enterprise Pension Administration.

Note. (USA) (CAN) The values *COBRA Dependent Only, None, QDRO Representative - Employee,* and *QDRO Representative - Recipient* are Canadian and United States values only.

Marital Status Enter the dependent or beneficiary's marital status.

Marital Status - As of When adding a new dependent, enter the as of date for marital status.

When an individual undergoes a subsequent change in status, the effective date for the change is recorded and the system no longer uses the as of date. This field is critical for determining eligibility for benefits enrollment.

Copyright © 1988-2006, Oracle. All rights reserved.

Student Select if the dependent or beneficiary is a student.

Student - As of When adding a new dependent, enter the as of date for the individual's student status.

When an individual undergoes a subsequent change in status, the effective date for the change is recorded and the system no longer uses the as of date. This field is critical for determining eligibility for benefits enrollment.

Disabled Select if the dependent or beneficiary is disabled.

Disabled - As of When adding a new dependent, enter the as of date for the individual's disability status.

When an individual undergoes a subsequent change in status, the effective date for the change is recorded and the system no longer uses the as of date. This field is critical for determining eligibility for benefits enrollment.

Smoker Select if the dependent or beneficiary smokes. The Smoker check box is necessary for dependents who are enrolled in benefit plans that use calculation rules. The system calculates age-graded rates for individuals differently depending on whether they smoke.

Smoker - As of When adding a new dependent, enter the as of date for the individual's smoker status.

When an individual undergoes a subsequent change in status, the effective date for the change is recorded and the system no longer uses the as of date. This field is critical for determining eligibility for benefits enrollment.

Occupation Enter the dependent or beneficiary's occupation, if known.

National ID

Use this group box to enter the dependent or beneficiary's national identification number. Dependents and beneficiaries with citizenship in more than one country can have more than one national ID. Add as many rows as required.

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

National ID Type The system populates this field automatically with the default value that you established for this country on the National ID Type Table page. You can select another valid type.

National ID Enter the dependent's national ID number. The system automatically checks the format of your entry against the default format that you entered on the National ID Type Table page.

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

(MYS) Malaysia

Full Time Student - Within Malaysia Select if the dependent is a full time student in Malaysia.

Copyright © 1988-2006, Oracle. All rights reserved.

Full Time Student - Outside Malaysia Select if the dependent is a full time student outside of Malaysia.

(BEL) Belgium

Fiscally Dependent Select if the employee is fiscally responsible for the dependent.

Fiscal Situation Spouse Select the appropriate fiscal situation from the list.

Fiscally Disabled Select if applicable.

Profession Category Spouse Select the appropriate category from the list.

Orphan Select if applicable.

(FRA) France

Use this group box to store information that can be passed to your payroll system for payroll processing.

Family Supplement For numerous families, payroll calculates the family allowance amount that your organization gives to an employee based on their family dependents. This calculation is based on the number and type of employee dependents. Select this check box to indicate that the corresponding dependent has to be considered in the calculation of the supplemental family allowance.

Garnishment This option is for court orders that require that an employee's wages be garnished. When an employee is under a court order, payroll can calculate the percentage and amount of the employee's salary that has to be transferred to the relevant government agency in each pay period.

Depending on the number of dependents, this amount is reduced. The greater the number of dependents, the lower the percentage of frozen salary. Select this check box to indicate that the corresponding dependent has to be considered in the calculation of the frozen garnishment amount.

AFB Allowance (French Banking Association allowance) The French Banking Association delivers a special allowance based on the number of dependents. Select to indicate that the corresponding dependent has to be considered in the calculation of this allowance.

CHIC CHIC is a medical insurance company that employees can opt to use to supplement their medical insurance coverage. This insurance company delivers a special allowance based on the number of dependents. Select this check box to indicate that the corresponding dependent has to be considered in the calculation of this allowance.

Schooling See Family Supplement.

Holiday Premium See Family Supplement.

Status 7 and **Status 8** Configure these fields to capture additional payroll related status information.

Collective Agmt Select if applicable.

IJSS Calc. (Indemnités Journalières de Sécurité Sociale) IJSS is the social security daily allowances. Select if the dependent should be taken into account in the calculation of the employee's entitlement for IJSS. The IJSS is calculated by PeopleSoft Entreprise Global Payroll for France.

Copyright © 1988-2006, Oracle. All rights reserved.

(GBR) United Kingdom

Eligible for Parental Leave Select if the dependent qualifies the employee for parental leave. Select the Disabled check box on the top page if it also applies here.

Adopted Dependent Select if the employee adopted the dependent.

Adoption Date If adopted, enter the adoption date.

Certificate(s) Verified Select to indicate that appropriate certificates have been provided to verify this dependent information.

(BRA) Brazil

Education Level Select the education level of the dependent.

Disabled Select to indicate that the dependent is disabled and the employee can receive the family allowance and income tax benefits for the dependent for additional years.

Vaccination Certificate Select if you have received the dependent's vaccination certificate. This information is used for reporting purposes.

Student Select to indicate that the dependent is a student. Employees receive income tax benefits for all students up to 21 years old. If the dependent is a student and is less than six years old, the employee should provide a vaccination certificate to the company to receive the income tax benefit.

University or Technical Level Select to indicate that the dependent is a student at the university or technical level and the employee can receive the income tax benefit for the dependent for additional years (for students up to 24 years old).

Termination Cd (termination code) Enter the reason code for the family allowance termination. Values are:

Child Abandonment: Abandonment of child.

Dependent exceeds ceiling: Dependent's age exceeds maximum age.

Court Decision: Court decision (in case of divorce or separation).

Dependent's Death: Dependent's death.

End Disability: Disability ended.

Child Custody: Custody has been awarded to the other parent.

Termination: Termination.

Termination Dt (termination date) Enter the family allowance termination date.

Enter information from the dependent's birth certificate in the Birth Data group box. This information is used for reporting purposes.

Enter the type of vaccination, the dose, and the date received for each vaccination on the dependent's vaccination certificate in the Vaccination Data group box. This information is used for reporting purposes.

Copyright © 1988-2006, Oracle. All rights reserved.

(CAN) Canada

Eligible for CSB If you are entering dependent and beneficiary information for a Canadian employee, select this check box to indicate that the dependent or beneficiary is an eligible registrant for an employee who is purchasing Canadian Savings Bonds (CSBs). The PeopleSoft Payroll-CSB Registrant page verifies the selection of this check box.

(USA) US Federal Government

FEHB Participant Enter a value to indicate that the dependent has Federal Employee's Health Benefits (FEHB).

Dependent's Fed Plan Type If the dependent is a FEHB Participant, enter the federal plan type. Valid Values are:

- *CHA*: Campus.
- *FEH*: FEHB.
- *MCA*: Medicare Plan A.
- *MCB*: Medicare Plan B.
- *OTH*: Other Federal Health Plans.

Medicare Number If the dependent is on Medicare, enter their Medicare number.

Medicare A Indicator, Medicare B Indicator, and **Medicare D Indicator** Select if the indicator if the dependent is in a Medicare A, Medicare B, or Medicare D program.

Medicare Reason A, Medicare Reason B, and **Medicare Reason D** If the dependent is a Medicare recipient, enter the reason they have Medicare A, Medicare B, or Medicare D.

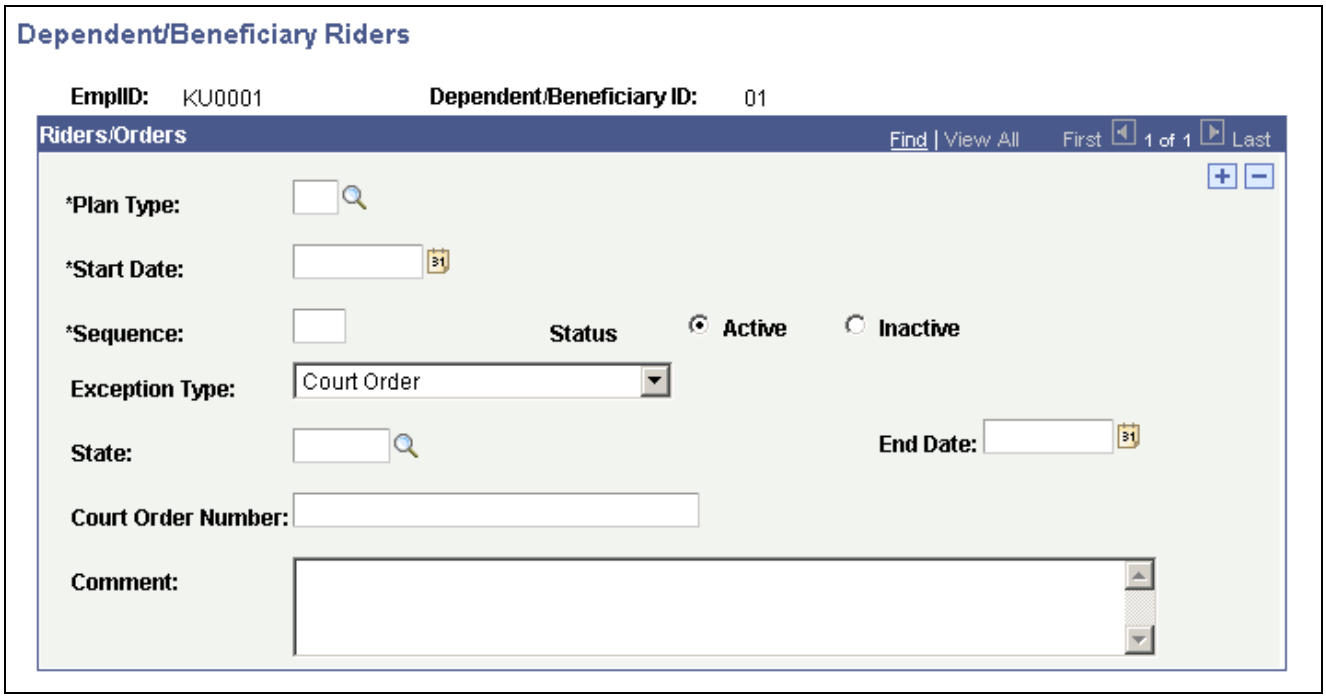
See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Benefits, "Getting Started with Manage Base Benefits"

Entering Information About Court-Ordered Benefits for Dependents

Access the Dependent/Beneficiary Riders page.

Copyright © 1988-2006, Oracle. All rights reserved.



Dependent/Beneficiary Riders page

The Dependent/Beneficiary Riders page enables you to enter any court-ordered benefits or spousal waivers. This page enables the system to validate any changes or omissions in benefit enrollments with a recorded rider. When an employee enrolls in a benefit plan and there is a court-ordered mandate specifying that a benefit be provided, the system does not complete the enrollment.

Plan Type Enter the type of plan to which the court order relates.

Start Date Enter the date on which the court order becomes effective.

Sequence Prioritizes court orders when you have more than one that takes effect on the same day. Enter a number that indicates which court orders take precedence over others. If there is only one court order, enter a sequence of *1*.

Status Select whether the court order is *Active* or *Inactive.* This field is typically used to void a court order before the end date takes effect. If the status is *Inactive,* the system won't enforce any validations against this court order.

Exception Type Select whether this is a court order (a legal document that grants a dependent the right to receive benefit coverage), spousal waiver (document that formally waives a spouse's claim to a minimum beneficiary allocation of funds from a life insurance policy or savings plan), or neither.

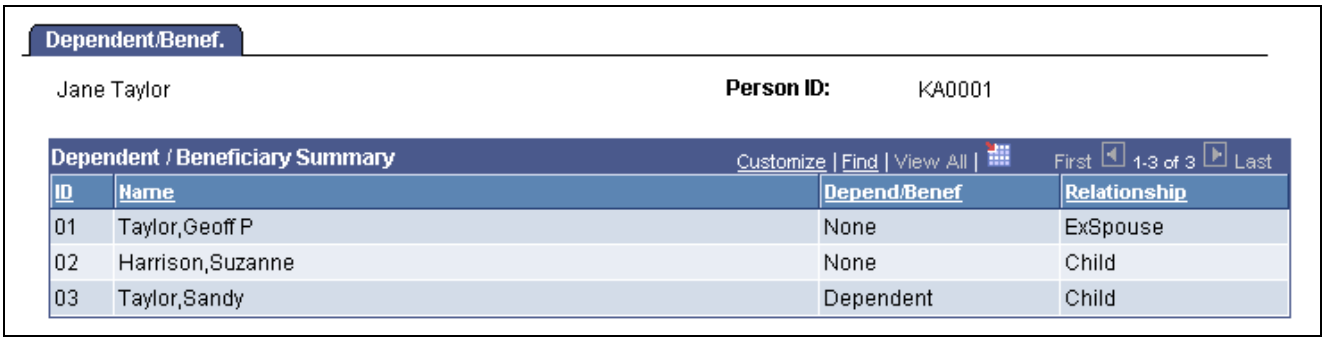
End Date Enter the date on which the court order ends. When the court order expires, the system won't enforce any validations against this court order.

Court Order Number Enter the official number that is issued by the state for this court order.

(NLD) Viewing an Employee's Dependents and Beneficiaries

Access the Dependent/Benef page.

Copyright © 1988-2006, Oracle. All rights reserved.



Dependent/Benef. page

Dependent/Beneficiary Summary

This group box displays a summary of all dependent and beneficiary data for an employee.

ID This column displays the ID of the dependent or beneficiary.

Name This column displays the name of the dependent or beneficiary.

Depend/Benef (dependent/beneficiary) Indicates whether the person is a dependent or beneficiary.

Relationship Describes the relationship of the dependents and beneficiaries to the employee.

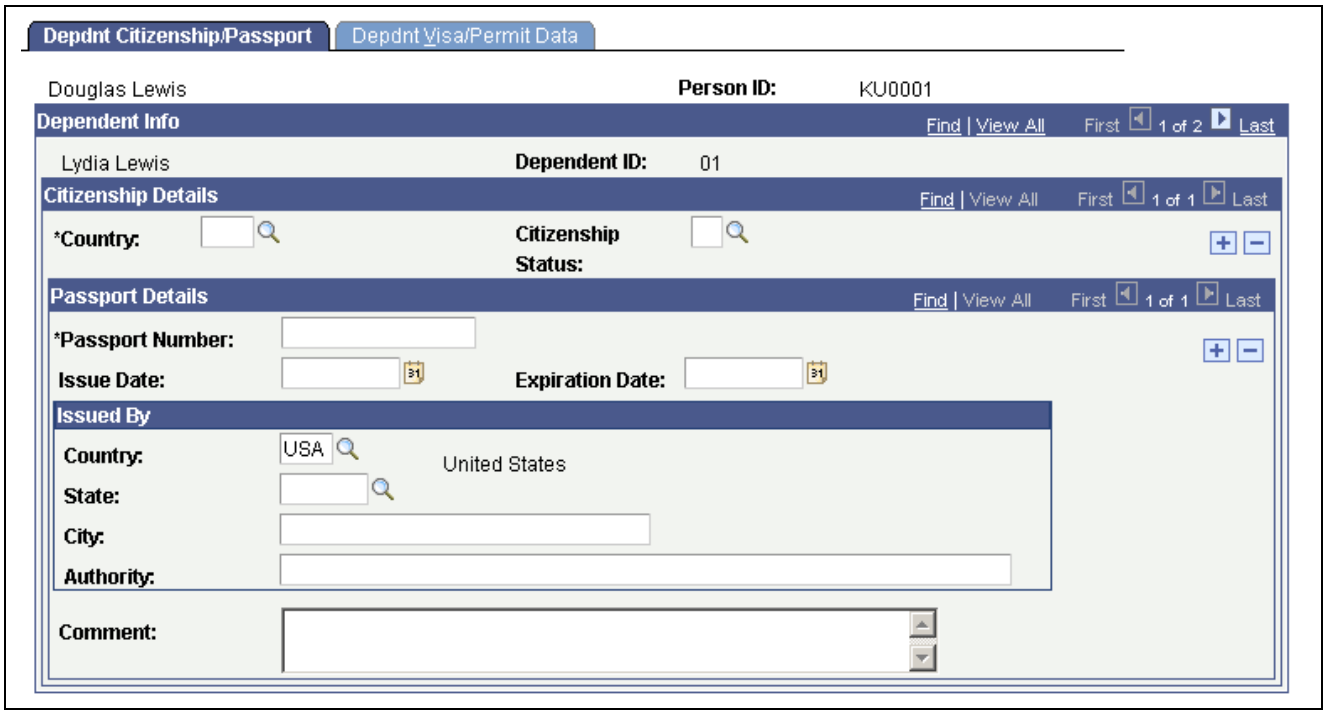
Note. Over time, changes occur and you need to terminate dependent enrollments or beneficiary statuses. Remember, you enroll dependents and assign beneficiaries when you enroll employees. As with employees, to terminate a dependent enrollment or beneficiary status, you must enter a row of data with the termination date. Don't make such a change using the Dependent/Beneficiary Data page. Make the change using the benefit detail page for the benefit in question.

Warning! If you delete dependent or beneficiary data by using the Dependent/Beneficiary Data pages, you destroy historical data. When you change enrollment data, it won't matter that the dependent or beneficiary data is available here. It must remain if your system is to provide correct historical information.

Entering Dependent Citizenship and Passport Information

Access the Depdnt Identification Details - Depdnt Citizenship/Passport page.

Copyright © 1988-2006, Oracle. All rights reserved.



Depdnt Identification Details - Depdnt Citizenship/Passport page

Enter information on this page in the same manner that you enter data on the Citizenship/Passport page .

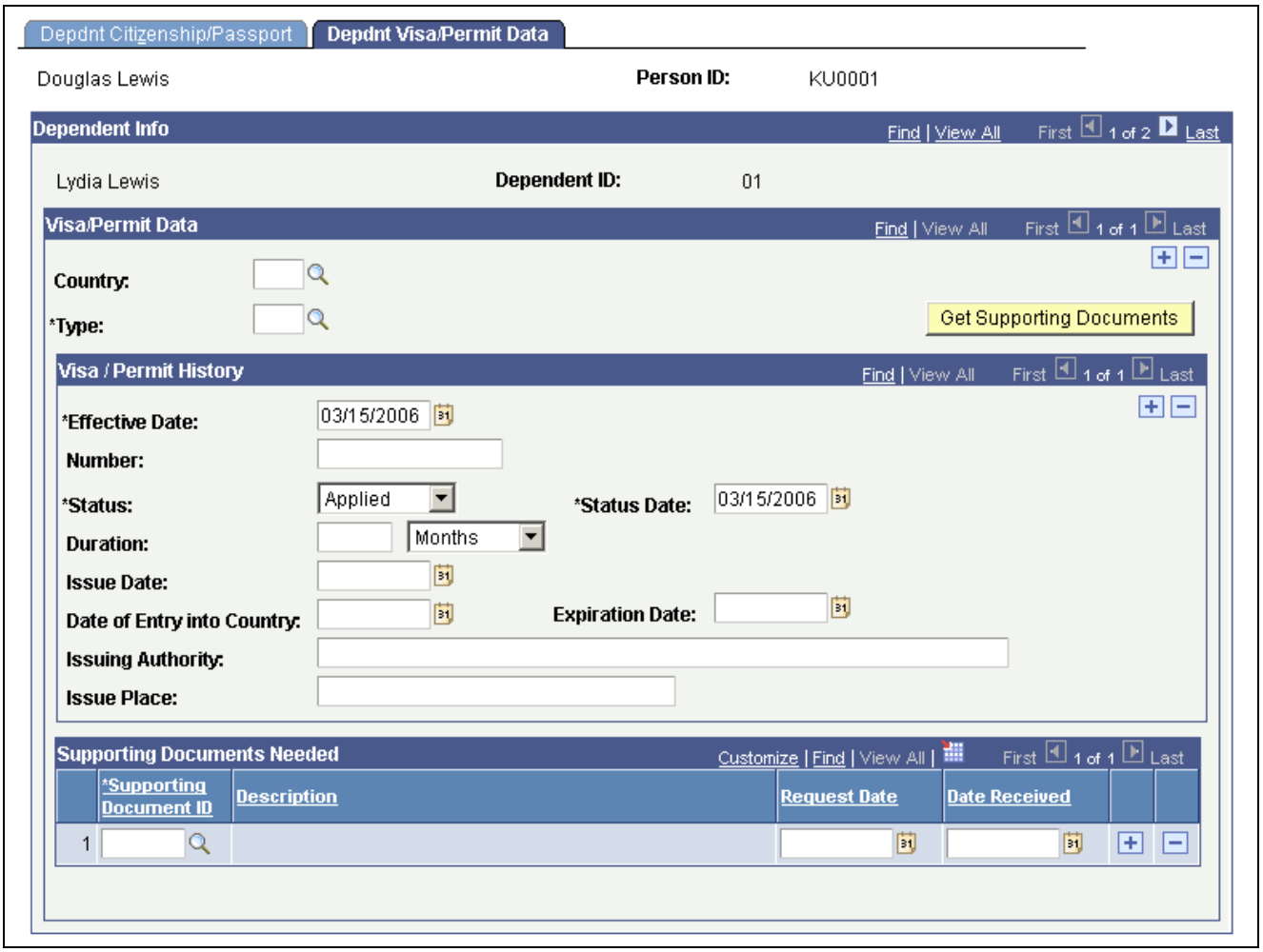
See Chapter 8, "Entering Additional Data in Human Resources Records," Tracking Employee Passport and Citizenship Information, page 336.

Note. (DEU) If you administer a workforce in Germany, use the Visa/Permit table to record OECD work permits for OECD nationals who want to work in a protected industry. Because permit types are keyed by country, if you track a German employee's OECD work permit information on the Identification, Visa/Permit table in the Track Global Assignments menu, select *DEU* as the country code from among your valid OECD permit types.

Entering Dependent Visa and Permit Data

Access the Depdnt Visa/Permit Data page.

Copyright © 1988-2006, Oracle. All rights reserved.



Depdnt Visa/Permit Data page

Enter information on this page in the same manner that you enter data on the Visa/Permit Data page.

See Chapter 8, "Entering Additional Data in Human Resources Records," Entering an Employee's Visa or Permit Information, page 337.

Tracking Emergency Contacts

This section discusses how to enter primary address and phone information for emergency contacts.

Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Track Emergency Contacts

Page Name	Object Name	Navigation	Usage
Contact Address/Phone	EMERGENCY_CONTACT	Workforce Administration, Personal Information, Personal Relationships, Emergency Contact, Contact Address/Phone	Enter names, addresses, and primary phone information for people to contact in the event of a worker emergency.
Other Phone Numbers	EMERGENCY_CONTACT2	Workforce Administration, Personal Information, Personal Relationships, Emergency Contact, Other Phone Numbers	Record additional phone numbers at which the emergency contact can be reached, such as a work or cellular phone number.
Emergency Contacts	PRCSRUNCNTL	Workforce Administration, Personal Information, Personal Relationships, Emergency Contacts Report	Generate the Emergency Contacts report (PER004). This report lists all contacts on the Emergency Contact table. Run the Refresh Employees Table process before running this report.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "PeopleSoft Application Fundamentals for HRMS Reports"

Entering Primary Address and Phone Information for Emergency Contacts

Access the Contact Address/Phone page.

Copyright © 1988-2006, Oracle. All rights reserved.



Contact Address/Phone page

Contact Name Enter the name of the emergency contact person.

Relationship to Employee Select the option that indicates the contact's relationship to the worker.

Primary Contact Select if this is the *first* person whom you should try to contact in an emergency. Select for only one contact.

Same Address as Employee and **Address Type** Select if the contact has the same address information as the worker, and then select the worker address type that is the same as this contact's. If selected, you don't need to complete any of the address fields.

Same Phone as Employee and **Phone Type** Select if the contact has the same phone information as the worker, and then select the worker phone type that is the same as the contact's. If selected, you don't need to complete any of the phone fields. An emergency contact can have the same address as the worker but a different phone number.

Change Country Click to enter or edit the contact's country.

Edit Address Click to enter or edit the contact's address.

Contact Phone Enter the contact's phone information.

Copyright © 1988-2006, Oracle. All rights reserved.

Managing Citizenship and Visa or Permit Information

This section provides a list of common elements and discusses how to:

- Track employee passport and citizenship information.
- Enter an employee's visa and permit information.

Common Elements Used to Manage Citizenship and Visa or Permit Information

Expiration Date Enter the expiration date of the visa or permit.

Issue Date Enter the date on which the visa or permit was issued.

Issue Place Enter the location where the visa or permit was issued.

Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Manage Citizenship and Visa or Permit Information

Page Name	Object Name	Navigation	Usage
Citizenship/Passport	CITIZEN_PASSPORT	Workforce Administration, Personal Information, Citizenship, Identification Data, Citizenship/Passport	Track passport and citizenship information for employees. Enter multiple countries of citizenship and multiple passports for employees and their dependents.
Visa/Permit Data	VISA_PERMIT_DATA	Workforce Administration, Personal Information, Citizenship, Identification Data, Visa/Permit Data	Enter an employees visa or permit information.
Passport/Visa Expiration	PRCSRUNCNTL	Workforce Administration, Personal Information, Citizenship, Passport/Visa Expiration Audit	Generate the Passport/Visa Expiration report (PER032). This report lists employees and dependents that have passports, visas, or work permits on file that expire in 90 days of the report run date. The report is divided into two sections. The first section lists passport information including country, passport number, issue date, and expiration date. The second section lists visa and work permit information including country, visa and work permit number, type of permit, issue date, and expiration date.
Citizenship / Country / Visa	PRCSRUNCNTL	Workforce Administration, Personal Information, Citizenship, Citizenship / Country / Visa Audit	Generate the Citizenship/Country/Visa Audit report (PER033). This report lists discrepancies between employee citizenship country status and visa data. The report displays various discrepancies found for the employee citizenship status in the Personal Data table.

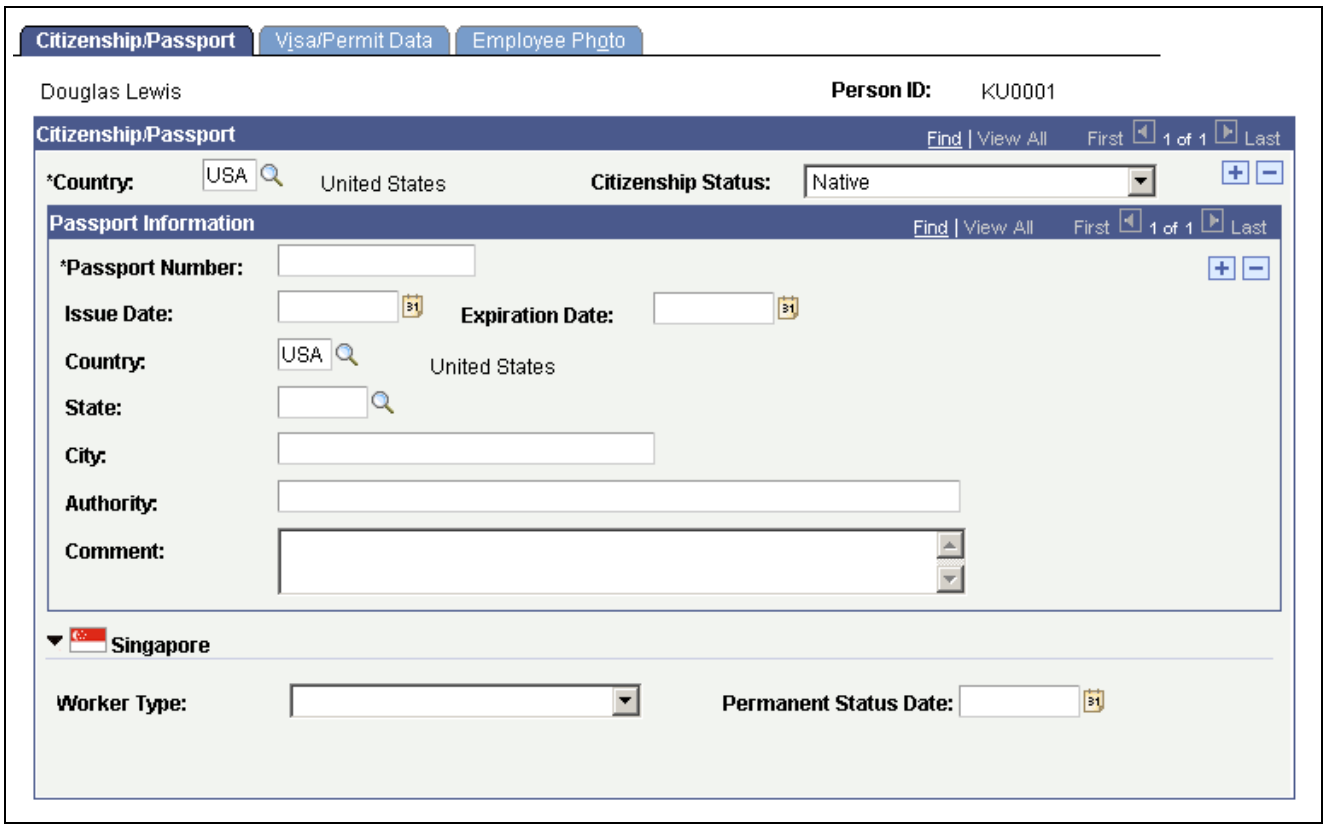
See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "PeopleSoft Application Fundamentals for HRMS Reports"

Copyright © 1988-2006, Oracle. All rights reserved.

Tracking Employee Passport and Citizenship Information

Access the Citizenship/Passport page.



Citizenship/Passport page

Country Enter the employee's country of citizenship.

Citizenship Status Indicate the employee's citizenship status. An employee's birth country and country of citizenship can be different. To track *birth* country information, use the Identity/Diversity page.

Note. (DEU) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV directive. This information is used in DEUEV processing and DEUEV reporting for German organizations or companies doing business in Germany. DEUEV processes and reporting are available only if you are using a German compliant payroll system.

Passport Information

Passport Number Enter the passport number.

Country Enter the originating country for this passport.

Authority Enter the issuing authority, such as the U.S. Passport Agency.

(SGP) Singapore

Worker Type Select the type of worker for the employee.

Copyright © 1988-2006, Oracle. All rights reserved.

Permanent Status Date Enter the date the employee became a permanent worker for your organization.

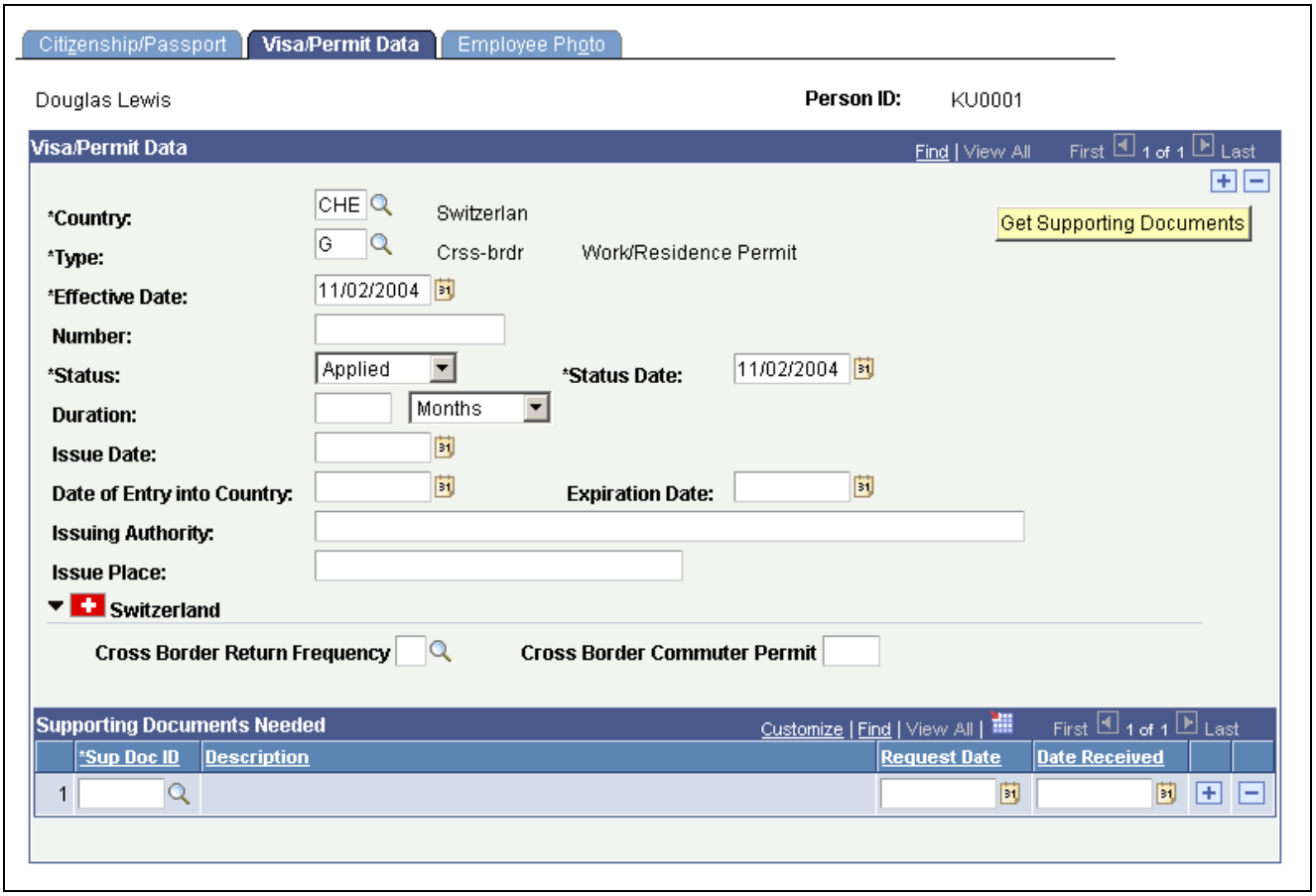
See Also

PeopleSoft Enterprise Global Payroll for Germany 9.0 PeopleBook

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Track Global Assignments, "Setting Up Global Assignments"

Entering an Employee's Visa or Permit Information

Access the Visa/Permit Data page.



Visa/Permit Data page

Type Select a type of visa or permit. The system prompts you with only types that are associated with the selected country.

Get Supporting Documents Click to have the system enter a list of the appropriate supporting documents that are needed to obtain the visa or permit type that you entered.

Number Enter the visa or permit number.

Status Select the visa or permit status: *Applied, Granted, Renewal in Progress, Cancelled* (for people in Indonesia and Singapore only), and *Renewed.*

Status Date Enter the date on which the status of the visa or permit changed.

Copyright © 1988-2006, Oracle. All rights reserved.

Duration Enter the number of days, months, or years that the employee stayed in the country. Select the unit of duration *(Days, Months,* or *Years)* in the adjacent field.

Date of Entry into Country Enter the date on which the employee entered the country.

Issuing Authority Enter the agency that issued the visa or permit, such as the U.S. Department of State or the French Consulate.

Supporting Documents Needed

Sup Doc ID (supporting document ID) If additional documents are required for this employee to obtain the visa or permit type, select a supporting document ID.

Request Date Enter the date on which the documents were requested.

Date Received Enter the date on which the documents were received.

(CHE) Switzerland

Cross Border Return Frequency Enter the frequency this employee travels to their home outside of Switzerland:

D: daily.

W: weekly.

This is a required field when the type of permit is:

G: Cross Border Commuter.

PG: Border Crossing Permit.

Cross Border Commuter Permit Enter the permit number for the Cross Border Commuter Permit.

Note. (DEU) If you're administering a workforce in Germany, use the Visa/Permit table to record OECD work permits for OECD nationals who want to work in a protected industry. Because permit types are keyed by country, if you're tracking a German employee's OECD work permit information on the Identification - Visa/Permit Table page in the Administer Workforce menus, select *DEU* as the country code to select from among your valid OECD permit types.

See Also

Chapter 3, "Setting Up Country-Specific Tables," Entering German Nation DEUEV Codes, page 56

Managing Driver's License Information

This section discusses how to enter license numbers and other driving record information.

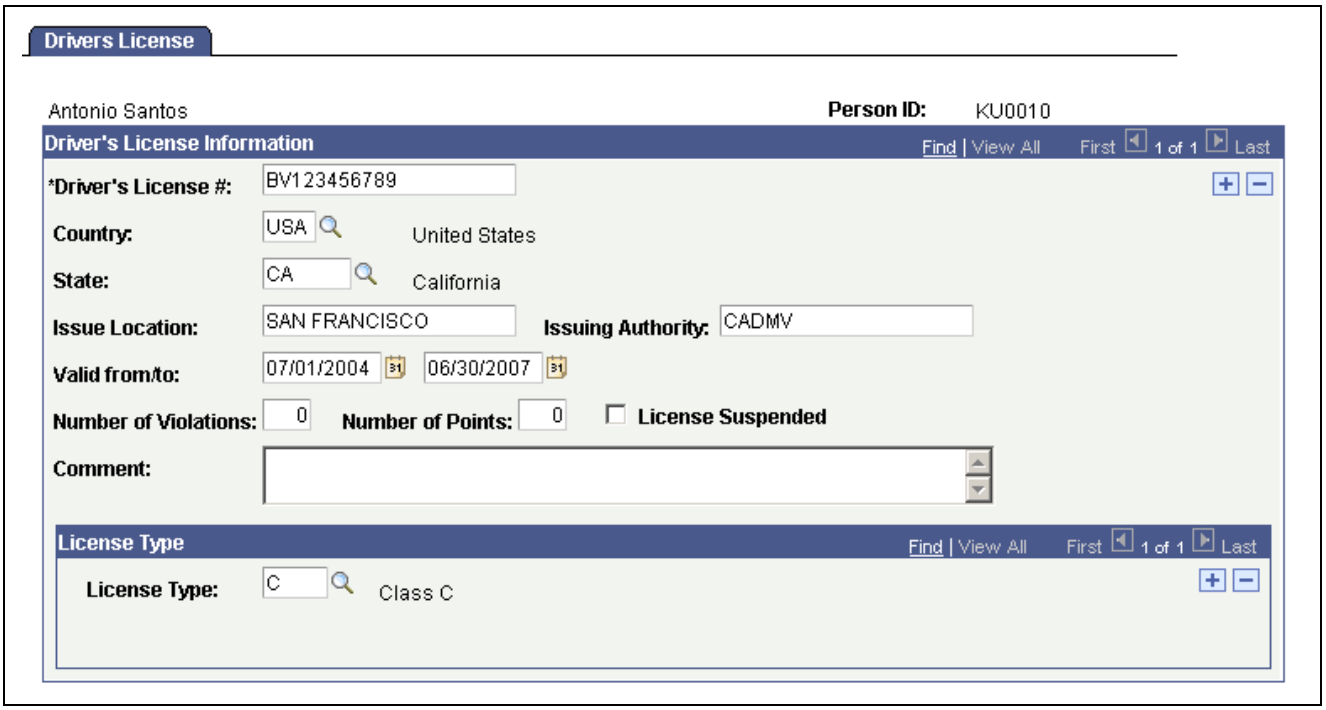
 Copyright © 1988-2006, Oracle. All rights reserved.

Page Used to Manage Driver's License Information

Page Name	Object Name	Navigation	Usage
Drivers License	DRIVERS_LIC_GBL	Workforce Administration, Personal Information, Biographical, Driver's License Data	Enter license numbers or other data from a worker's driving record.

Entering License Numbers and Other Driving Record Information

Access the Drivers License page.



Drivers License page

Driver's License # (Driver's License Number) Enter the license number.

Issue Location Enter the location where the license was issued.

Issuing Authority Enter the agency that issued the driver's license, such as the Department of Motor Vehicles.

Valid from/to Enter the dates on which the driver's license remains valid. The *to* date must be in the future.

Number of Violations Enter the number of traffic violations cited on the worker's driving record.

Number of Points Enter the number of points accumulated on the worker's driving record.

License Suspended Select if the worker's driver's license is currently suspended.

License Type Enter the type of license held by the worker.

If you need to enter more than one driver's license for a worker, add a new data row.

Copyright © 1988-2006, Oracle. All rights reserved.

Entering Bank Account Information

This section discusses how to:

- Record a person's bank account information.
- (GBR) Enter a worker's building society roll number and name.
- (MEX) Specify the inter-bank payment code.

Pages Used to Enter Bank Account Information

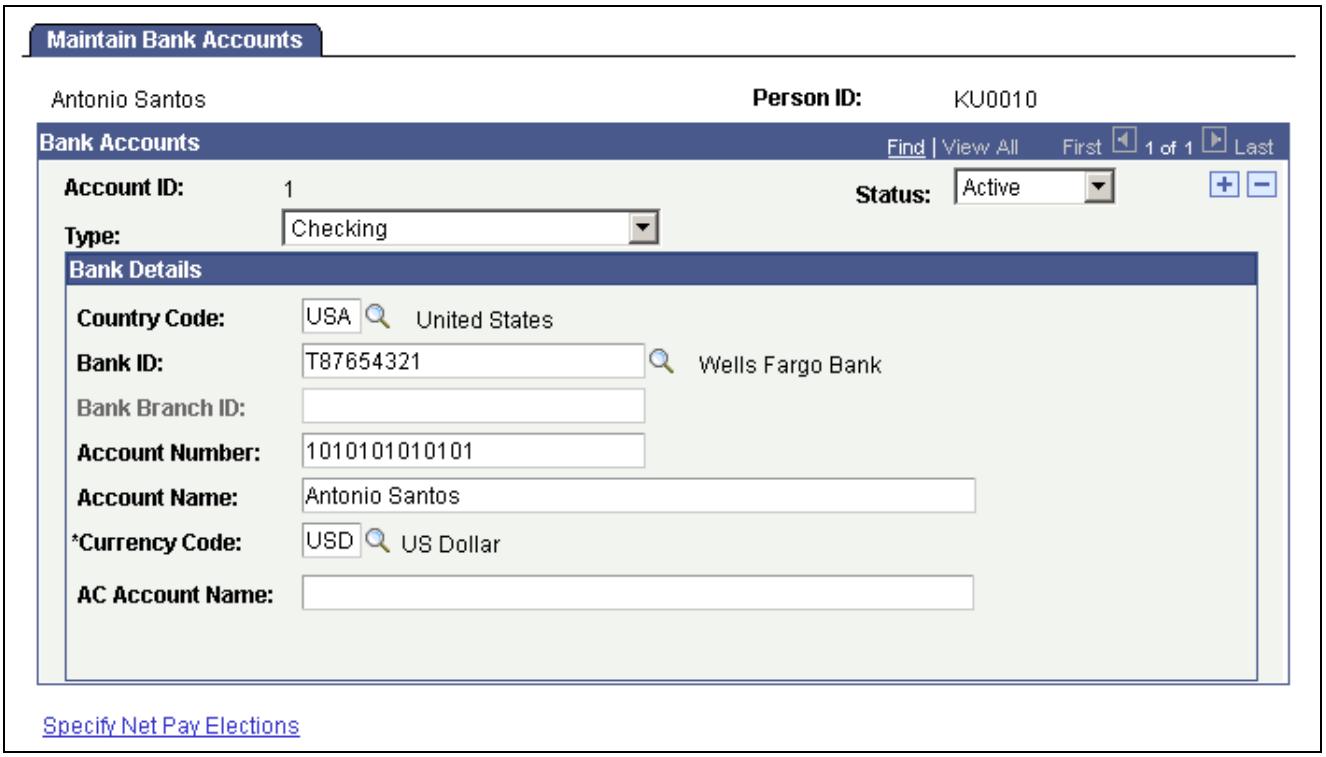
Page Name	Object Name	Navigation	Usage
Maintain Bank Accounts	PYE_BANKACCT	Workforce Administration, Personal Information, Biographical, Bank Accounts, Maintain Bank Accounts	Enter bank account information for a payee. Use this information to track worker direct deposit information.
International Bank Account Nbr	BANKACCT_IBAN_SEC	Click the Edit IBAN link.	(BEL, CHE, DEU, ESP, FRA, GBR, ITA, and NLD) Generate and edit the International Bank Account Number (IBAN). See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up Banks and Bank Branches," Setting Up IBAN Information.
Building Society Details	PYE_BS_SP_UK	Click the Other Required Information link on the Maintain Bank Accounts page.	(GBR) For this page to appear, the country code must be *GBR* and the building society ID must have a value. Enter a person's building society roll number and name.
Inter-bank Payment Scheme	GPMX_PYE_BANKACCT	Global Payroll & Absence Mgmt, Payee Data, Net Pay / Recipient Elections, Maintain Bank Accounts, Maintain Bank Accounts Click the Other Required Information link. Workforce Administration, Personal Information, Biographical, Bank Accounts, Maintain Bank Accounts Click the Other Required Information link.	(MEX) Enter the Clave Bancaria Estandarizada (CLABE) number associated with the payee's bank account.

Copyright © 1988-2006, Oracle. All rights reserved.

Page Name	Object Name	Navigation	Usage
Bank Prenote Information USA	GPUS_PRENOTE	Click the Prenote Information link on the Maintain Bank Accounts page. This link is available only if you select the Prenote Process Allowed check box on the Installation Settings USA page.	Indicate whether prenotification files (used in Federal Schedule Reconciliation) need to be generated. See *PeopleSoft Enterprise Global Payroll for United States 9.0 PeopleBook*, "Defining Banking," Updating Prenote Information for Payees.
Specify Net Pay Elections	GP_NET_DIST	Click the Specify Net Pay Elections link on the Maintain Bank Accounts page.	Define how a person's net pay is distributed between the their bank accounts. See *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*, "Defining Banking Instructions," Specifying Net Pay Elections.

Recording a Person's Bank Account Information

Access the Maintain Bank Accounts page.



Maintain Bank Accounts page

Copyright © 1988-2006, Oracle. All rights reserved.

Note. Before you can enter a person's bank details, first set up the bank branch or building society on the Bank/Branch Table page.

Account ID The system creates an account ID when you enter a new bank or building society account for a person. This field is for information only.

Type Select the type of account that you are tracking. Options are *Building Society Roll Number, Checking, Current Account, Giro Account, Regular,* and *Savings.*

Country Code Enter the country where the bank account is located. When you move out of this field, the system populates the Currency Code field with the appropriate currency.

Other Required Information (MEX) Click this link to access the Inter-bank Payment Scheme page, where you can enter the Clave Bancaria Estandarizada (CLABE) number. This link is available only for Mexican banks.

See Chapter 8, "Entering Additional Data in Human Resources Records," (MEX) Specifying the Inter-bank Payment Code, page 344.

Bank ID Enter the bank ID.

Bank Branch ID Enter the bank branch ID for the account.

Building Society ID (GBR) If you entered *GBR* in the Country Code field, this field replaces the Bank Branch ID field. See details below.

Account Number Enter the account number for the person.

Account Name Enter the account name for the person.

Prenote Information (USA) Click this link to access the Bank Prenote Information USA page.

IBAN and **Edit IBAN** (BEL, CHE, DEU, ESP, FRA, GBR, ITA, and NLD) Displays the IBAN number for the account.

Click the Edit IBAN link to access the International Bank Account Number page where you can generate and edit the IBAN for the bank account.

AC Account Name (alternate character account name) Enter the alternate character account name, if applicable. Appears if you enabled alternate character (AC) functionality in the Org Defaults by Permission Lst component.

Specify Net Pay Elections Click this link to access the Specify Net Pay Elections page where you can view and update net pay details for the person.

(GBR) Entering Banking Information for UK Workers

UK customers also use this page to record workers' building society account information. When you enter *GBR* in the *Country* field, the Bank Branch ID field becomes the Bld Soc ID (building society ID) field.

UK customers who enter details of UK bank and building society accounts should enter the following information in the fields on the Bank Account Information page:

Copyright © 1988-2006, Oracle. All rights reserved.

Field	UK Bank and Building Society Information
Type	Select an account type: *Current Account:* Select for a bank account. *Building Society Roll Number:* Select for a building society account. *Savings:* Not applicable to the UK. *Checking:* Not applicable to the UK.
Country Code	Enter *GBR*.
Bank ID	If the worker has a bank account, select the bank branch from the list of branches set up in the Bank table. If the worker has a building society account, leave this field blank.
Building Society ID	If the worker has a building society account, select the building society from the list of societies set up in the Branch table. When you select a building society, the system automatically completes the Bank ID field with the bank that handles clearing for the selected building society. If the worker has a bank account, leave this field blank.
Account Number	Enter the worker's bank account number. If you selected a building society in the Building Society ID field, the system automatically completes the Account Number field with the building society's account at the clearing bank and makes the field display-only. **Note.** To enter the worker's building society account details, click Other Required Information.
Account Name	Enter the account name. If you selected a building society in the Building Society ID field, the system makes this field display-only. Click Other Required Information to display the Building Society Details page where you enter the account name.

Copyright © 1988-2006, Oracle. All rights reserved.

Field	UK Bank and Building Society Information
Currency Code	The system provides a default value of *GBP* (Pound Sterling). Override this default if necessary.
Other Required Information	Click to display the Building Society Details page, where you enter the worker's building society account details. The system does not display this link if you select a normal bank branch in the Bank ID field.

Note. For more information about the account number formats for a country, see the corresponding PeopleSoft Enterprise Global Payroll local country documentation.

See Also

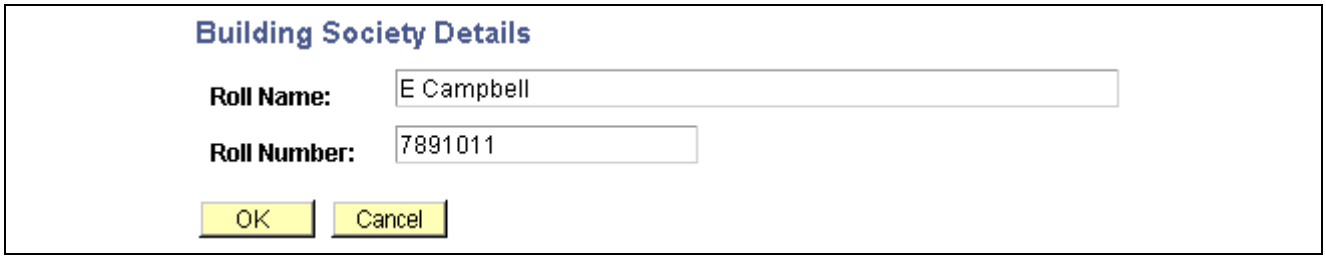
PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up Banks and Bank Branches"

PeopleSoft Enterprise Global Payroll for United States 9.0 PeopleBook, "Defining Banking," Managing the Prenotification Process

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Defining Banking Instructions"

(GBR) Entering a Worker's Building Society Roll Number and Name

Access the Building Society Details page.



Building Society Details page

When you select a building society ID, the Other Required Information link appears on the page.

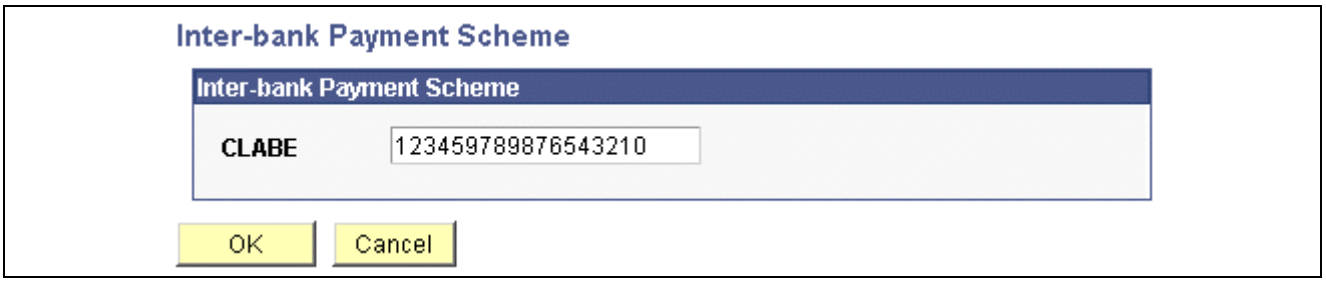
Roll Name Enter the roll name of the worker's building society account.

Roll Number Enter the worker's building society account number.

(MEX) Specifying the Inter-bank Payment Code

Access the Inter-bank Payment Scheme page.

Copyright © 1988-2006, Oracle. All rights reserved.



Inter-bank Payment Scheme page

CLABE Enter the Clave Bancaria Estandarizada (CLABE) number associated with the payee's bank account. The CLABE number is a numeric 18-digit standardized bank code for domestic Inter-bank fund transfers.

Tracking Volunteer Activity

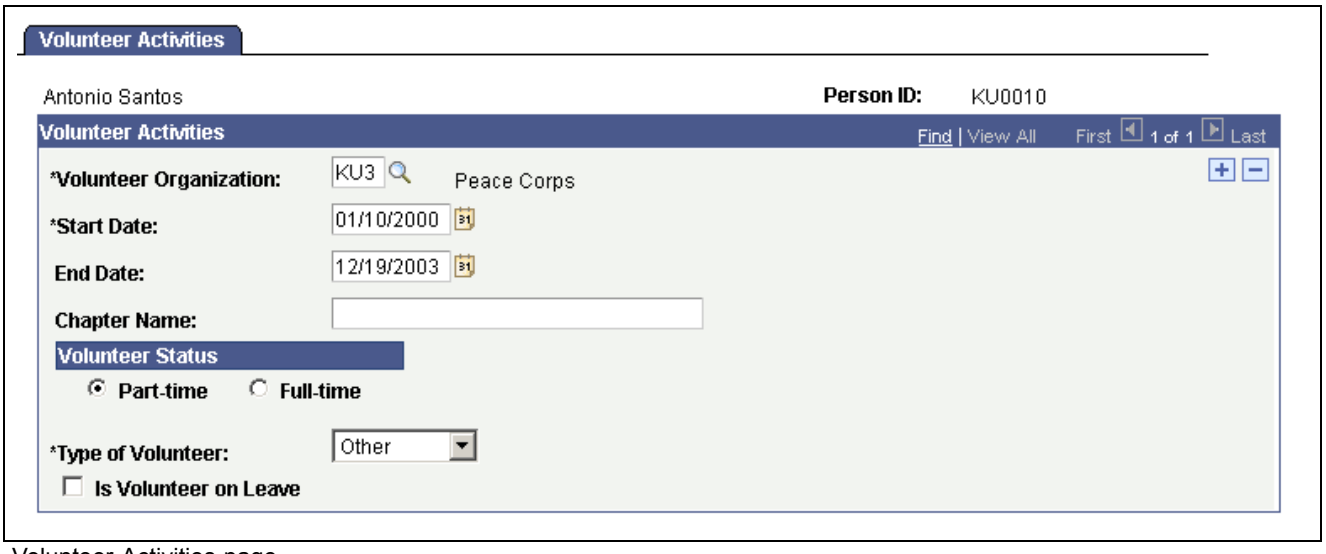
This section discusses how to enter information on worker volunteer activities.

Page Used to Track Volunteer Activity

Page Name	Object Name	Navigation	Usage
Volunteer Activities	VOLUNTEER_ACTIVITY	Workforce Administration, Personal Information, Biographical, Volunteer Activities	Enter information on worker volunteer activities. Track multiple volunteer organizations for workers and multiple start dates with the same organization.

Entering Information on Worker Volunteer Activities

Access the Volunteer Activities page.



Volunteer Activities page

Copyright © 1988-2006, Oracle. All rights reserved.

Volunteer Organization	Select a volunteer organization code.
Start Date and **End Date**	Enter the start and end date of the worker participation.
Chapter Name	Enter the chapter name of the organizations in which the employee volunteers, if applicable.
Volunteer Status	Select either *Part Time* or *Full Time* to indicate the volunteer status.
Type of Volunteer	Select the type of volunteer activity in which the worker is participating: *Administr, Canvasser, Executive, Fund Raise,* or *Other.*
Is Volunteer on Leave	Select if the volunteer is on leave.

Note. This check box is for informational purposes only. If you select this check box, you don't affect any Monitor Absences business process functionality.

Note. This information is useful when you need to track workers' additional skills and knowledge, and when you measure the effectiveness of company-sponsored volunteer and charitable programs.

Setting Up and Tracking Military Service Availability and Job Update Approvals

To set up military service availability tracking and job update approvals, use the Deployment Reasons (MIL_DEPL_REASON), Reassignment Reasons (MIL_REASSGN_RSN), Approval Levels (MIL_APPRVL_LVL_DFN), and Order Codes (MIL_ORD_CODE_DEFN) components.

This section discusses how to:

- Enter military service availability.
- Tracking approvals for mass or individual job updates.

 Copyright © 1988-2006, Oracle. All rights reserved.

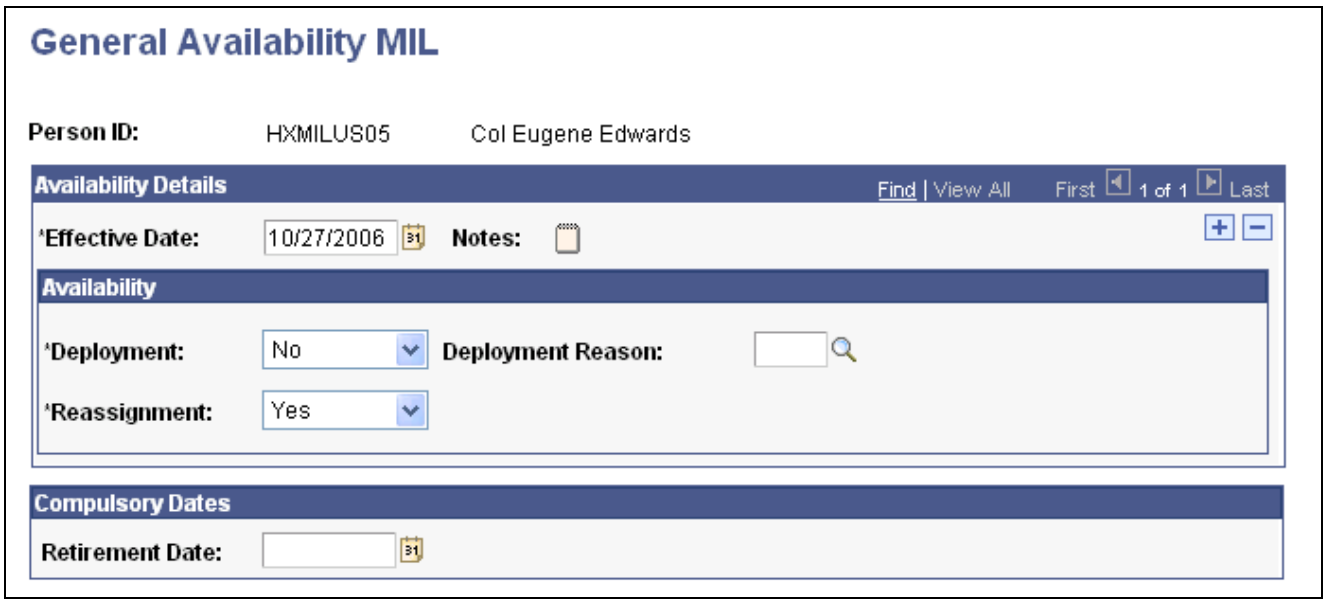
Pages Used to Enter and Track Military Service Availability and Job Update Approvals

Page Name	Object Name	Navigation	Usage
Deployment Reasons	MIL_DEPL_REASON	Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Deployment Reasons, Deployment Reasons	Enter reasons military members are either unavailable for deployment or are available in a limited capacity.
Reassignment Reasons	MIL_REASSGN_RSN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Reassignment Reasons, Reassignment Reasons	Enter reasons military members are either unavailable for reassignment or are available in a limited capacity.
General Availability MIL	MIL_AVAIL_DEFN	Workforce Administration, Personal Information, Biographical, General Availability MIL	Track a service member's availability for deployment and retirement. Use this page to also enter a compulsory retirement date, if applicable.
Approval Levels	MIL_APPRVL_LVL_DFN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Approval Levels, Approval Levels	Define military approval levels to describe the various levels used for approving orders that affect military members' Job rows. The approval levels codes are associated with the service member's Job Data rows on the Employee Data Tracking MIL page.
Order Codes	MIL_ORD_CODE_DEFN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data MIL, Order Codes, Order Codes	Enter military order codes that would indicate a reason for a job change. The order codes are associated with the service member's Job Data rows on the Employee Data Tracking MIL page.
Employee Data Tracking MIL	MIL_EE_DATA_TRK	Workforce Administration, Job Information, Employee Data Tracking MIL	When an employee or group of employees have a new Job row created as a result of a specific event (for example, mass deployment), use this component to indicate the approvals that occurred for this Job change. Changes to the job rows can be done manually or through the Mass Update process.

Copyright © 1988-2006, Oracle. All rights reserved.

Entering Military Service Availability

Access the General Availability MIL page.



General Availability MIL page

Effective Date Enter the effect date of a member's deployment and reassignment availability to keep historical track of when the member's availability changes.

Notes Click the Maintain/View Notes icon to enter additional notes about the person's availability. The system tracks the date you enter a comment. You can also search for comments by entering a date range and selecting them for review, deletion, or transferring the comment to another person.

Deployment Identify whether this service member is ready for deployment. Valid values are defined on the Translate table as *Yes, No,* and *Limited.* When you select *No* or *Limited* to specify that the service member is not fully available for deployment, the Deployment Reason field displays.

Deployment Reason Provide the reason the service member is not deployable. Valid values are defined in the Deployment Reasons table.

Reassignment Identify whether this service member is available for reassignment. Valid values are defined on the Translate table as *Yes, No,* and *Limited.* When you select *No* or *Limited* to specify that the service member is not fully available for reassignment, the Reassignment Reason field displays.

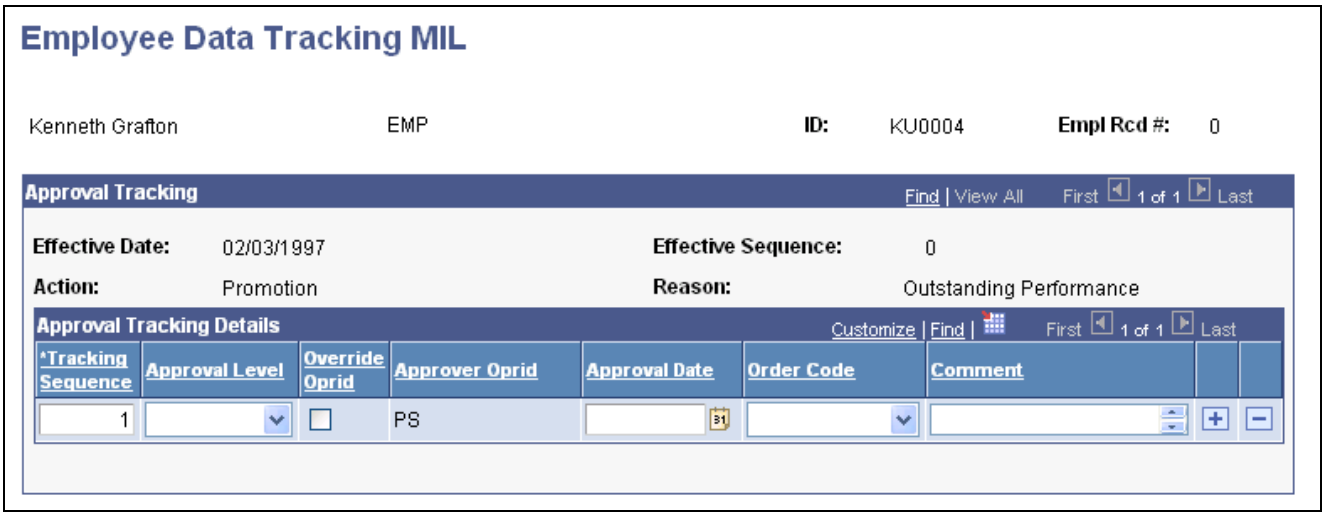
Reassignment Reason Select a reassignment reason to track military members who are either unavailable for reassignment or are available only in a limited capacity. Valid values are defined in the Reassignment Reasons table.

Retirement Date Enter the compulsory retirement date, or absolute date, the member must retire from the military.

Tracking Approvals for Mass or Individual Job Updates

Access the Employee Data Tracking MIL page.

Copyright © 1988-2006, Oracle. All rights reserved.



Employee Data Tracking MIL page

Tracking Sequence Enter a tracking sequence number.

Approval Level Select a level, such as initial request or final, for approving a military order. Define approval levels in the Approval Levels table.

Override Oprid (override operator ID) and **Approver Oprid** (approver operator ID) The system displays the operator that entered the approval information. Select the Override Oprid check box to manually update the approving operator id.

Approval Date Enter the date for this approval level.

Order Code Select an order that explains the purpose of this job change. Define order codes in the Order Codes table.

Comment Enter additional comments regarding this job update and approval.

Note. The Mass Update process will update this component by calling the service MassUpdateMilitaryApproval, which in turn will call the Component Interface HCR_MIL_EE_TRK_SRV.

Entering and Tracking Additional Workforce Data

This section discusses how to:

- Record badge numbers.
- Track a worker's business expenses.
- Track prior work experience.
- Enter worker images.

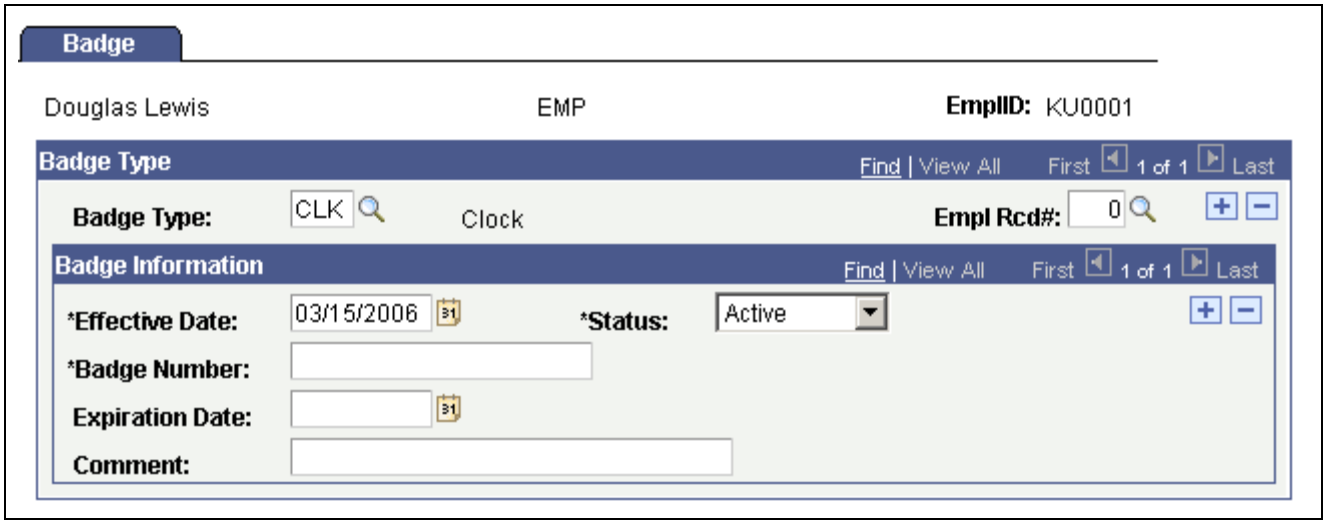
Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Enter and Track Additional Workforce Data

Page Name	Object Name	Navigation	Usage
Badge	BADGE	Workforce Administration, Personal Information, Badge	Record badge numbers that you issue to a person, including employees, contingent workers, or persons of interest.
Business Expenses	BUSINESS_EXPENSES	Workforce Administration, Job Information, Business Expenses	Track a worker's business expenses, such as travel, meals, entertainment, and relocation costs.
Prior Work Experience	PRIOR_WORK_EXPER	• Workforce Administration, Personal Information, Biographical, Prior Work Experience • Workforce Development, Career Planning, Manage Person Profiles, Prior Work Experience	Track prior work experience. Enter the details of a worker's previous employers and jobs.
Employee Photo	EMPLOYEE_PHOTO	Workforce Administration, Personal Information, Citizenship, Identification Data, Employee Photo	Enter a worker image into the system by copying and pasting images into image fields.
General Comments	GENL_COMMENTS	Workforce Administration, Personal Information, Biographical, General Comments	Enter a miscellaneous comment about a worker.

Recording Badge Numbers

Access the Badge page.



Badge page

You must have previously entered Badge Type data on the Translate table before using this page.

Copyright © 1988-2006, Oracle. All rights reserved.

Badge Type

Select the type of badge number that you want to enter:

BA (Building Access).

CCA (Computer Center Access).

CLK (Clock).

GB (General Badge).

PA (Parking Access).

Add more values if you want or enter more than one badge type for a particular worker and employment record number.

Badge Number

Enter the badge number that corresponds to the badge type that you selected. The system ensures that the number that you enter isn't currently assigned to another worker. It also ensures that the number hasn't been assigned for future use by someone else.

For each badge type, only one badge number per worker and employment record number can be active at the same time. Badge numbers can be reused. If a combination of badge type and badge number was previously assigned to a worker, but is currently inactive and hasn't been assigned for future use, you can use it for a different worker and employment record number.

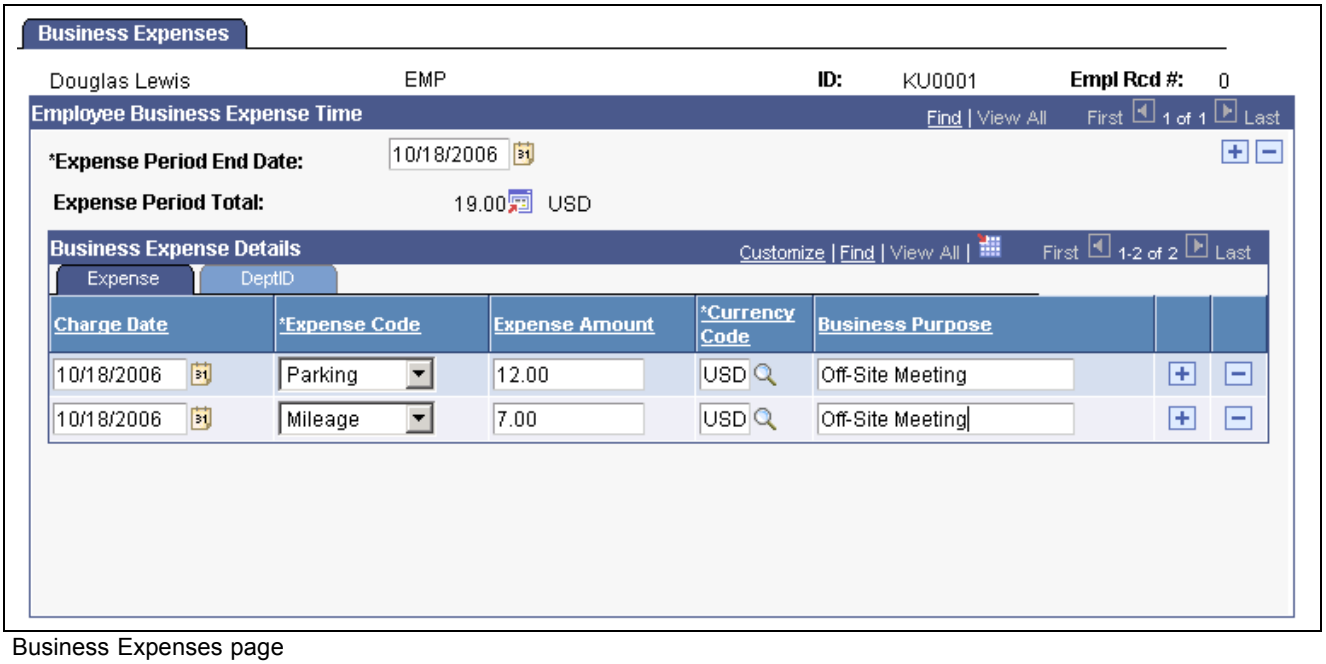
See Chapter 8, "Entering Additional Data in Human Resources Records," Setting Up Expiration Notification, page 358.

Expiration Date

Include the expiration date, if the badge expires.

Tracking a Worker's Business Expenses

Access the Business Expenses page.



Business Expenses page

Before you can track a worker's business expenses, you must set up:

- Valid expense codes on the Translate table.

Copyright © 1988-2006, Oracle. All rights reserved.

- User IDs on the Primary Permission List Preferences table.
- Currency codes on the Currency Code table.
- Departments on the Department table.

Expense Period End Date Enter the expense period end date for the period to which these expenses apply.

Charge Date Enter the date of the actual expense charge.

Expense Code Select an expense code, such as *Airfare,* for the charge.

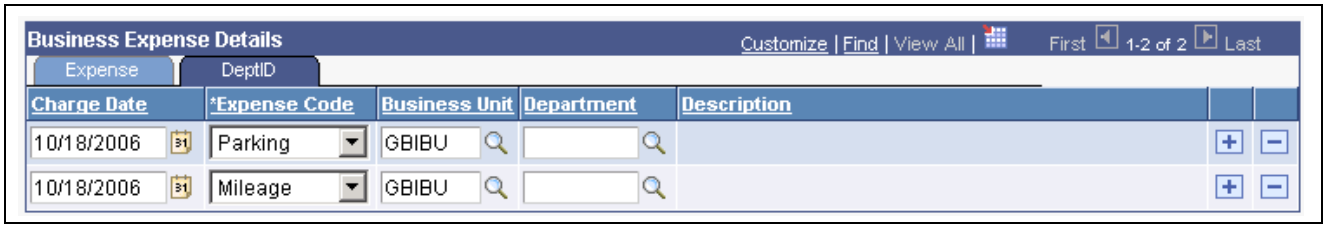
Expense Tab

Expense Amount Enter the amount of the expense.

Currency Code The currency that is specified for your user ID on the Primary Permissions List Preferences table appears by default. If there is no To Currency for your user ID, then the system uses the base currency that you specified for your implementation on the Installation table. Override the default currency if necessary by using the values in the Currency Code table.

DeptID Tab

Select the DeptID tab.



Business Expenses: DeptID tab

Business Unit Enter the business unit to which the expense should be charged.

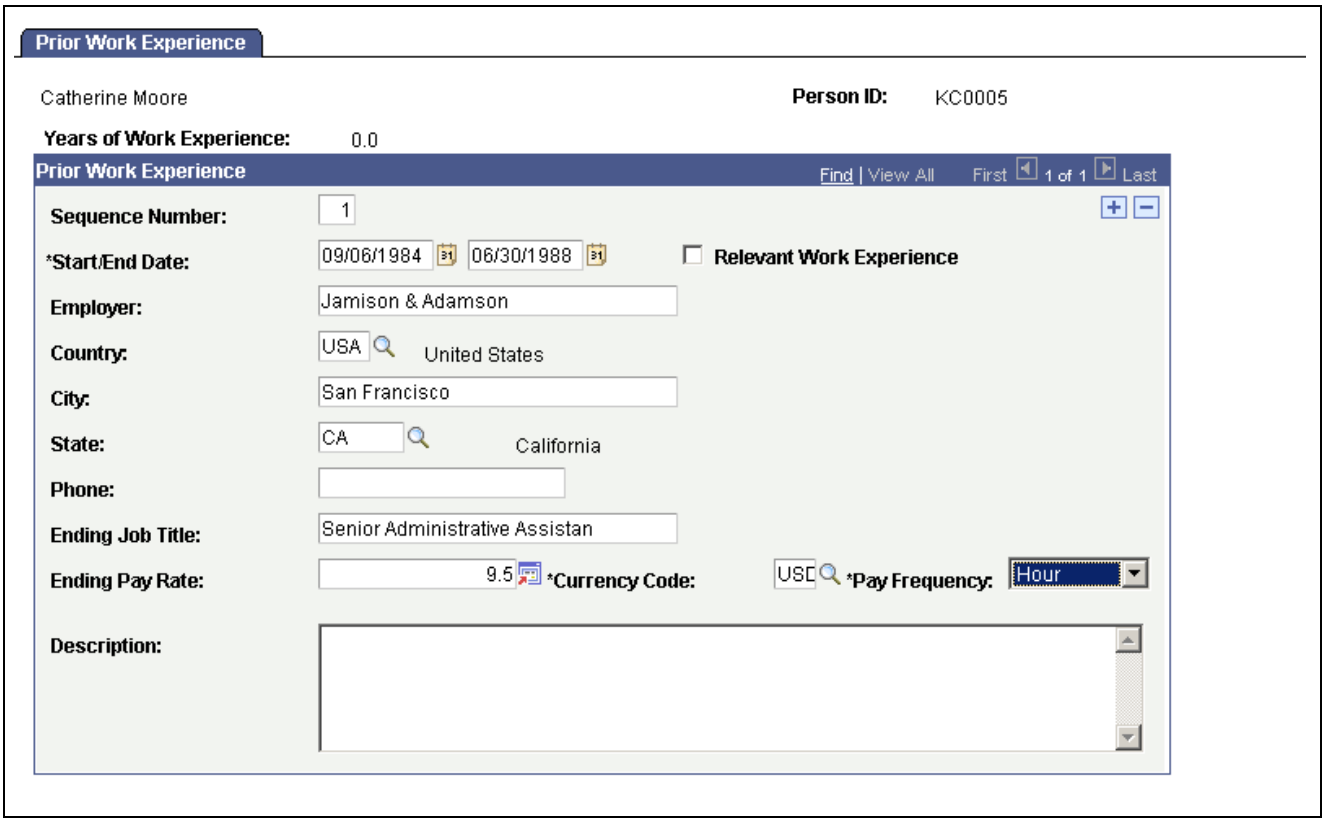
Department Select the specific department to which the expense should be charged.

Warning! The information that you enter here isn't related to PeopleSoft Enterprise Payroll for North America processing of business expenses.

Tracking Prior Work Experience

Access the Prior Work Experience page.

Copyright © 1988-2006, Oracle. All rights reserved.



Prior Work Experience page

If you've tracked an applicant through the Recruiting business process in PeopleSoft Enterprise Human Resources, the information that you entered for an applicant becomes part of the employee record when you hire the person. For other workers, entering prior work experience information helps you establish a complete profile for reporting purposes. It's also useful for career and succession planning.

Years of Work Experience The system calculates this value if you select the Relevant Work Experience check box. If so, you must enter a start date and end date.

Sequence Number Enter a sequence number for each prior work experience record.

Start/End Date Enter the beginning and end of the worker's tenure with the employer.

Relevant Work Experience Select if the experience was relevant to the worker's responsibilities with your organization.

Employer Enter the name of the worker's previous employer.

Ending Job Title Enter the title in which the worker ended employment.

Ending Pay Rate Enter the pay rate at which the worker ended employment.

Pay Frequency The pay Frequency field contains a default value of *Month,* which you can change if the pay amount reflects a different frequency.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Plan Careers and Successions, "Planning Careers"

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "PeopleSoft Application Fundamentals for HRMS Reports"

Copyright © 1988-2006, Oracle. All rights reserved.

Entering Worker Images

Access the Employee Photo page.

Before you insert an image (such as an employee photograph) in PeopleSoft Enterprise Human Resources, use a Windows-based graphics or drawing program to capture (and edit if necessary) the image or scanned photograph that you want to insert. Then use the Windows-based program to highlight the image or portion of it that you want to copy, and copy it to the Microsoft Windows clipboard. In most drawing programs, you can do this by selecting Edit, Copy, or pressing CTRL+C.

Click or tab to the image field and select Edit, Paste, or press CTRL+V to paste the image in the field. Click the Add button to browse for and upload a picture (such as Bitmap or .bmp files).

Note. Full imaging capabilities may not be supported on all database platforms.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

Setting Up and Tracking Security Clearance and Badge Access

This section provides an overview of security clearance and badge access and discusses how to:

- Set up security clearance.
- Track badge history.
- Track security clearance history.
- Set up expiration notification.
- Search for pending expirations.

Understanding Security Clearance and Badge Access

PeopleSoft provides the capability to track the security status of employees, contingent workers, and persons of interest and revoke their access levels and badges should be revoked. Using this feature, the system notifies security clearance administrators when the security status or badge clearance has expired.

 Copyright © 1988-2006, Oracle. All rights reserved.

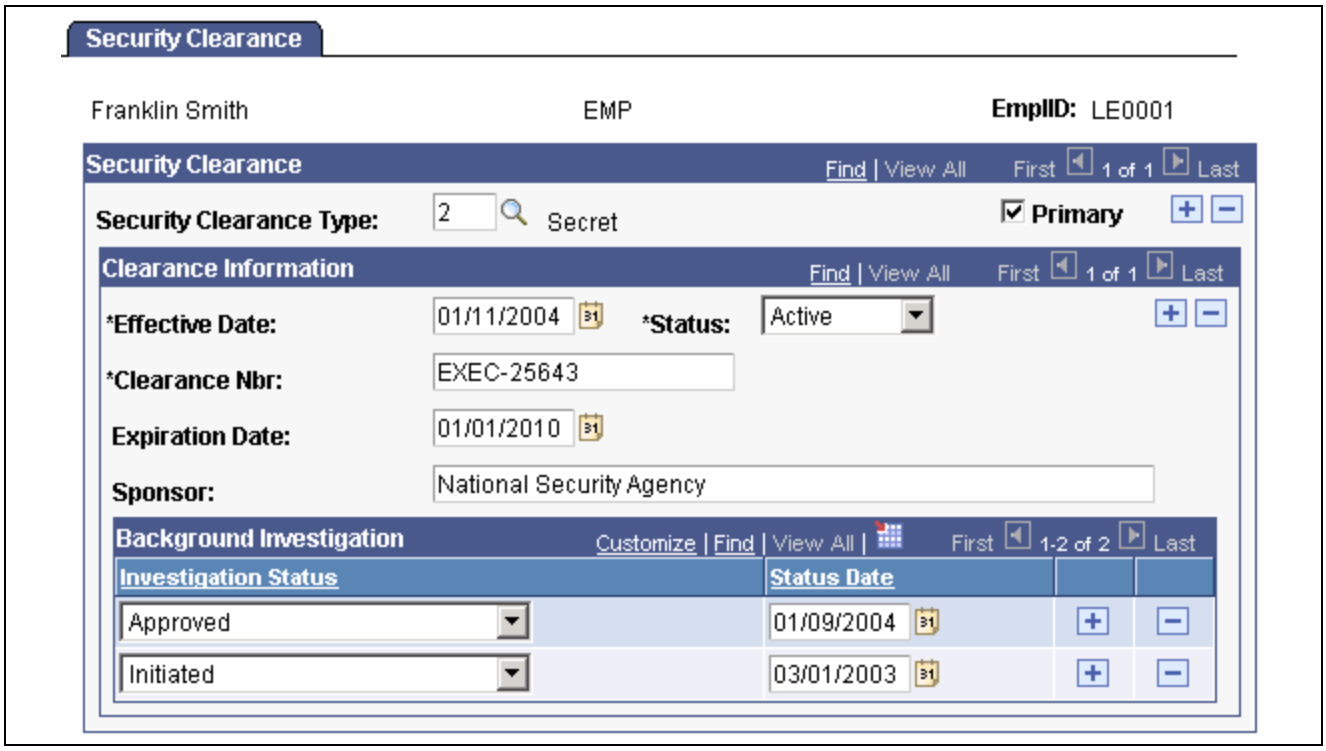
Pages Used to Track Security Clearance and Badge Access

Page Name	Object Name	Navigation	Usage
Security Clearance	HR_EE_SEC_CLR	Workforce Administration, Personal Information, Security Clearance	Select the security clearance type and information for a selected individual.
Badge History	HR_EE_BADGE_HIST	Workforce Administration, Personal Information, Badge/Clearance Access Summary, Badge History	View the complete history of a selected individual's badges.
Clearance History	HR_EE_SEC_CLR_HIST	Workforce Administration, Personal Information, Badge/Clearance Access Summary, Clearance History	View the complete history of a selected individual's security clearances.
Email History	HR_EE_EMAIL_HIST	Workforce Administration, Personal Information, Badge/Clearance Access Summary, Email History	Show a selected individual's most recent email address.
Expiration Notification	RC_EE_EXPIR_NOTIF	Workforce Administration, Personal Information, Expiration Notification	Set up a list of people who will be notified of pending expiration of contracts, contract task orders, assignments, badges and security clearances within a specified date range.
Expiration Inquiry	HR_EE_EXPIR_INQ	Workforce Administration, Personal Information, Expiration Inquiry	Search for pending expiration of contracts, contract task orders, assignments, badges and security clearances within a specified date range.

Setting Up Security Clearance

Access the Security Clearance page.

Copyright © 1988-2006, Oracle. All rights reserved.



Security Clearance page

Security Clearance Type Select the security clearance type. Individuals can have more than one security clearance type.

Security clearance type values are determined on the Security Clearance Type page.

Primary Select to determine the primary security clearance type if an individual has more than one security clearance type.

Effective Date Displays the date the individual's security clearance was granted.

Status Specify whether this security clearance is *Active* or *Inactive.*

Cleareance Nbr Enter the number associated with the clearance assignment.

Expiration Date Select the expiration date of the security clearance.

Sponsor Enter the sponsor who granted the security clearance. This can be the individual's current or previous agency, or an entirely separate agency. Each security clearance can have only one sponsor.

Background Investigations

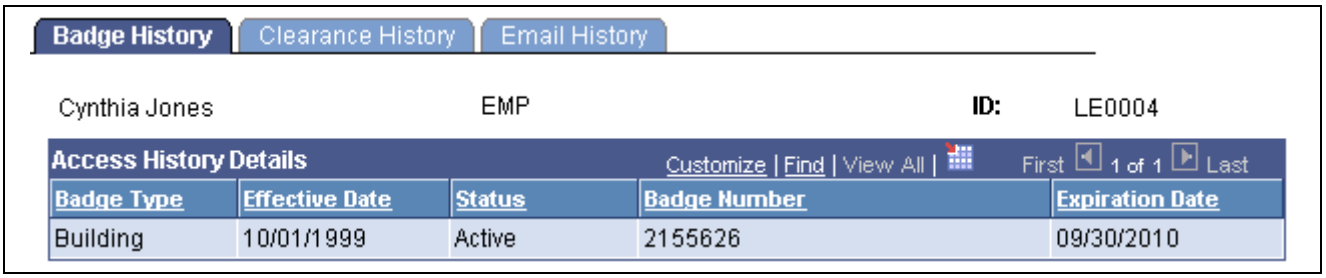
Investigation Status Track the status changes in the investigation process associated with getting the security clearance. There is no default for this field. Values include *Approved, Denied, In Progress,* or *Initiated.*

Status Date Select the date that the investigation status changes.

Copyright © 1988-2006, Oracle. All rights reserved.

Tracking Badge History

Access the Badge History page.



Badge History page

Badge Type Displays the badge type held by the individual.

Badge types are defined using the PeopleTools Translate Values component (PSXLATMAINT).

See *Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer.*

Effective Date Displays the date the individual's badge was issued.

Status Displays whether the badge is *Active* or *Inactive.*

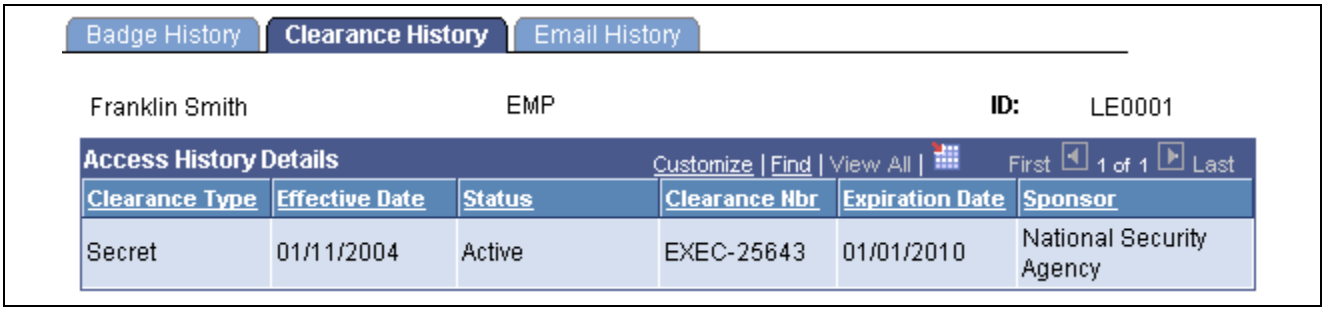
Badge Number Displays the badge number.

Badge numbers are determined on the Badge page.

Expiration Date Display the badge expiration date.

Tracking Security Clearance History

Access the Clearance History page.



Clearance History page

Clearance Type Displays the history of security clearance types held by the individual.

Security clearance types are determined on the Security Clearance page.

Effective Date Display the grant date for the individual's security clearance.

Status Displays whether the security clearance is *Active* or *Inactive.*

Clearance Nbr Displays the number associated with the security clearance assignment.

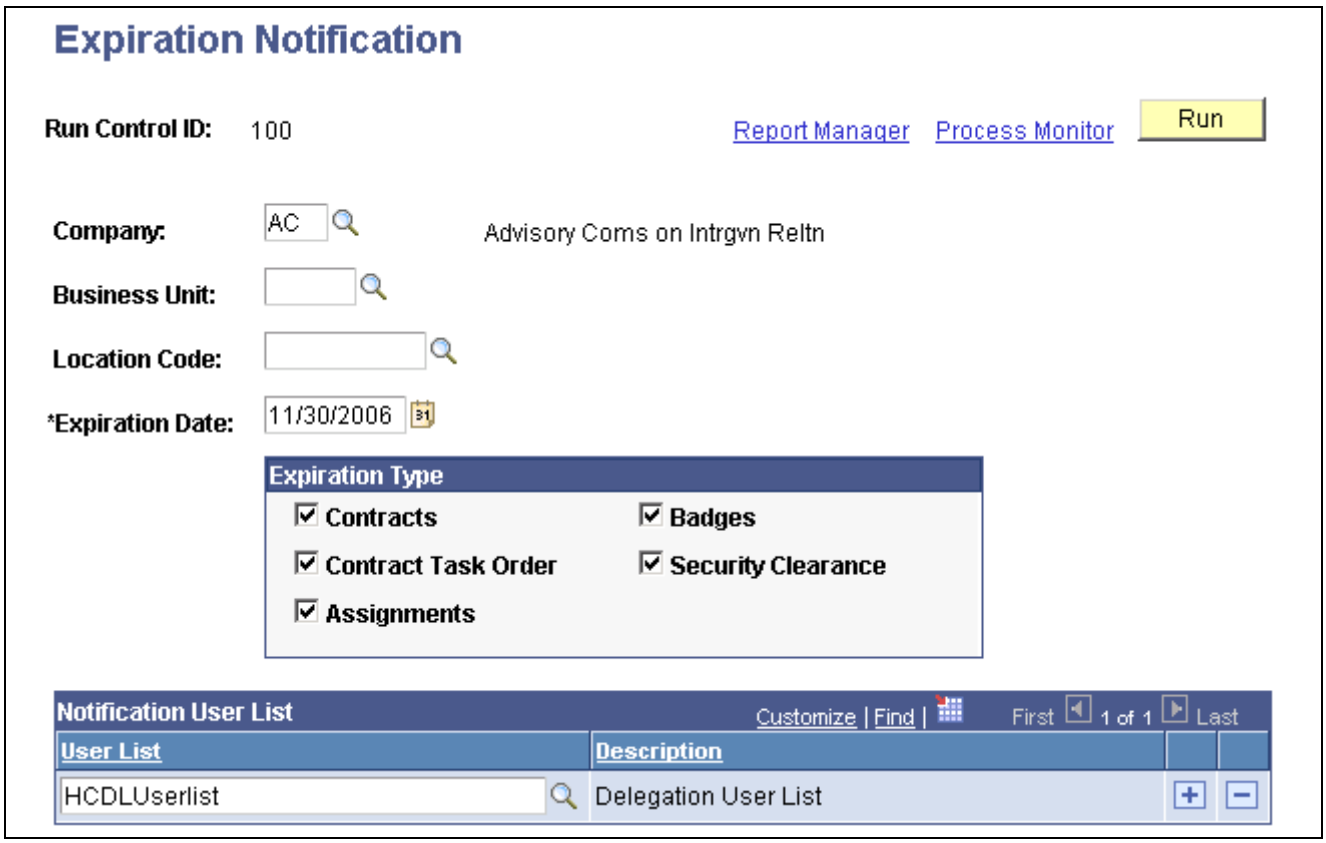
Expiration Date Displays the security clearance expiration date.

Sponsor Identifies the sponsor who granted the security clearance.

Copyright © 1988-2006, Oracle. All rights reserved.

Setting Up Expiration Notification

Access the Expiration Notification page.



Expiration Notification page

Company Select the company for which to generate the notification.

Expiration Date Select the date of expiration for which your company wants to notify managers of expiration types. Any people with expiring expiration types on or before this date will be returned.

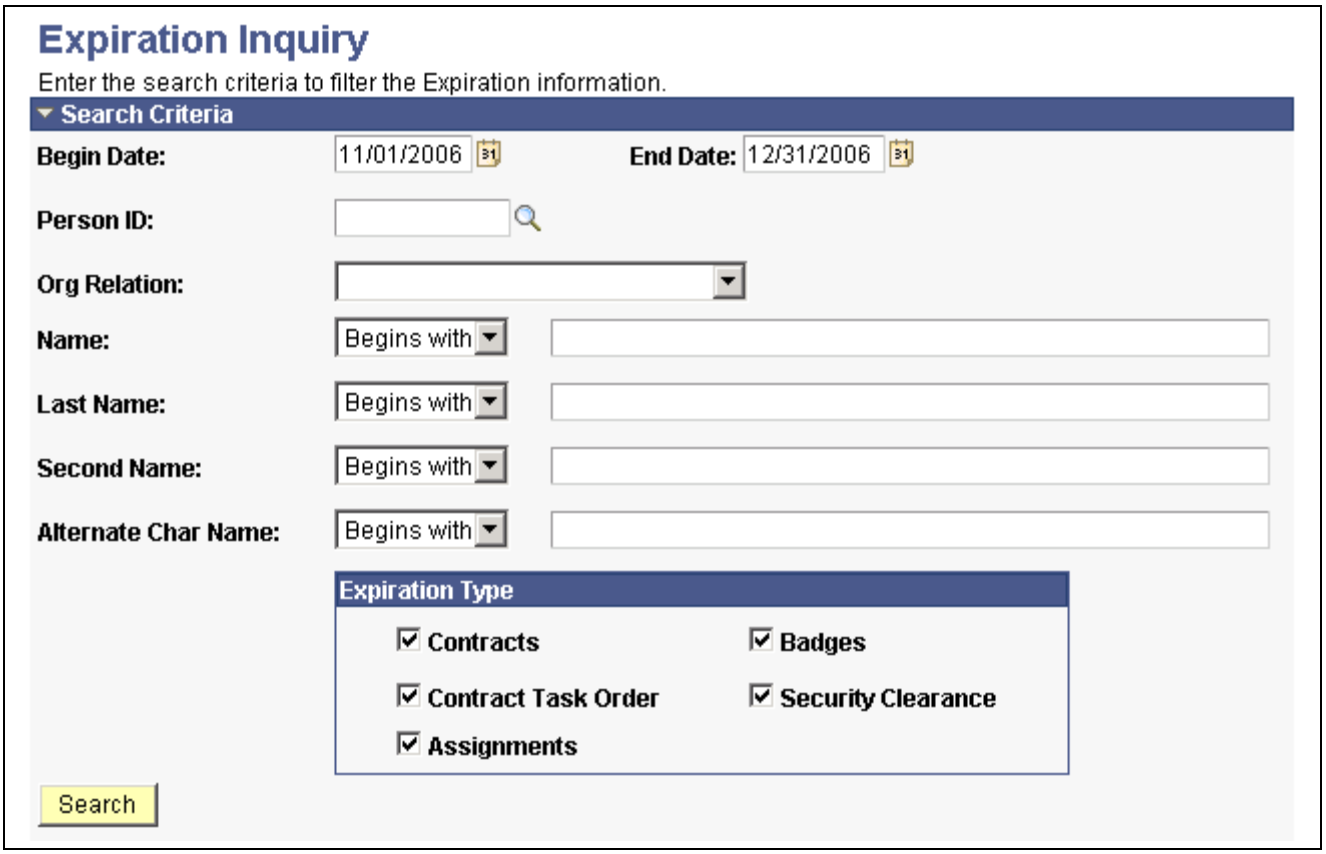
Expiration Type Select the type of expiration for which to generate notification.

User List Select the users who will be notified of impending expiration.

Searching for Pending Expirations

Access the Expiration Inquiry page.

Copyright © 1988-2006, Oracle. All rights reserved.



Expiration Inquiry page

Begin Date and **End Date**	Select the date range for which to search for pending expirations.
Person ID	Select a person ID to limit the search to the selected person.
Org Relation (organizational relationship)	Select the limit the search to a *Contingent Worker, Employee,* or *Person of Interest*.
Name, Last Name, Second Name, or **Alternate Char Name** (alternate character name)	Enter a value to search for a particular person.
Expiration Type	Select the type of expiration for which to search.
Search	Select the Search button to begin the search for pending expirations.

Copyright © 1988-2006, Oracle. All rights reserved.

 Copyright © 1988-2006, Oracle. All rights reserved.

CHAPTER 9

(BEL) Entering Additional Data for Belgian Workers

This chapter discusses how to:

- Track Claeys formula calculations.
- Prepare for severance calculations.
- Perform the Claeys calculation.
- Generate *Déclaration Immédiate - Onmiddelijke Aangifte* (DIMONA) notifications.
- Run the Social Report.

Tracking Claeys Formula Calculations

To track Claeys formula calculations, use the End Contract Type - BEL (END_CONT_TBL_BEL), End Contract Reason - BEL (REAS_END_TBL_BEL), Statute Table (STATUTE_TBL_BEL), Reduced Charged Table (RED_CHRG_TBL_BEL), RSZ Category Table (CONTR_RSZS_BEL), Contract Ending (CONTRACT_END_BEL), and Contract Replacement (CONTRACT_REPL_BEL) components.

If you're administering a Belgian workforce, you need to set up codes for events or conditions that may play a role in the termination of a Belgian worker's employment contract, and for the special reasons that are associated with those conditions. You also specify employment contract statutes and substatutes, and track special jobs that allow for lower premiums than are normally required by Belgian labor regulations.

Many of the tables that you set up for these purposes contain information that you use when performing Claeys formula calculations. Employers use the Claeys formula to calculate the cost of terminating a worker's contract based on number of service years, salary, age, seniority, type of employment contract, and so on.

This section discusses how to:

- Enter codes for events and conditions that result in terminating employment contracts.
- Define reason codes for ending employment contracts.
- Set up Belgian employment contract statutes for Claeys calculations.
- Link contract statutes to Rijksdienst Sociale Zekerheid (RSZ) categories.
- Record information that is necessary for terminating a Belgian worker.
- Enter a replacement worker for the employment contract.

Copyright © 1988-2006, Oracle. All rights reserved.

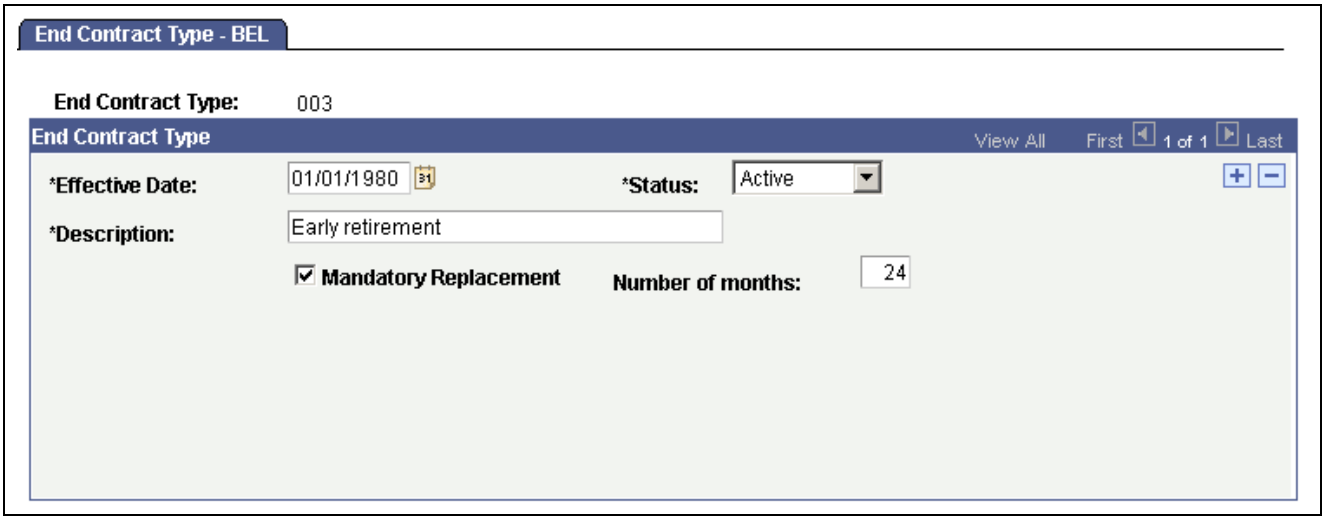
Pages Used to Track Claeys Formula Calculations

Page Name	Object Name	Navigation	Usage
End Contract Type - BEL	CNT_END_TBL_BEL	• Set Up HRMS, Product Related, Workforce Administration, Workforce Data BEL, Contract End Types • Workforce Administration, Job Information, Contract Administration, Define Contract End BEL	Enter or update codes for events and conditions that could result in the termination of employment contracts.
End Contract Reason - BEL	CNT_ENDRSN_TBL_BEL	• Set Up HRMS, Product Related, Workforce Administration, Workforce Data BEL, Contract End Reasons • Workforce Administration, Job Information, Contract Administration, Define Contract End Reason BEL	Define the reasons that are associated with event codes by adding or updating employment termination reason codes. First define contract termination event types.
Statute Table	STATUTE_TBL_BEL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data BEL, Statutes	Set up and maintain Belgian employment contract statutes and substatutes, and associate contract types with statutes.
Reduced Charged Table	RED_CHRG_TBL_BEL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data BEL, Reduced Charges	Set up the page that you use to update or add reduced charges job categories. Under Belgian employment law, these are job categories that enable you to pay reduced taxes and premiums on the compensation to workers who hold those jobs.
RSZ Category Table	CNT_RSZS_TBL_BEL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data BEL, RSZ Categories	Link contract statutes to *Rijksdienst Sociale Zekerheid* (RSZ) categories.
Contract Ending	CONTRACT_END_BEL	Workforce Administration, Job Information, Contract Administration, Terminate Contract BEL	Record information that is necessary for terminating a Belgian worker.
Contract Replacement	CONTRACT_REPL_BEL	Workforce Administration, Job Information, Contract Administration, Replace Contract BEL	Enter the person who replaces the worker in the employment contract.

Copyright © 1988-2006, Oracle. All rights reserved.

Entering Codes for Events and Conditions that Result in Terminating Employment Contracts

Access the End Contract Type - BEL page.



End Contract Type - BEL page

The end contract type codes can cover a wide range of events, including the employee's death, a voluntary or involuntary separation from your organization caused by retirement or relocation, or promotion into another job that has a different employment contract associated with it.

Mandatory Replacement Select if the reason for ending an employment contract with one employee requires mandatory replacement of the former worker with another worker in the same employment contract.

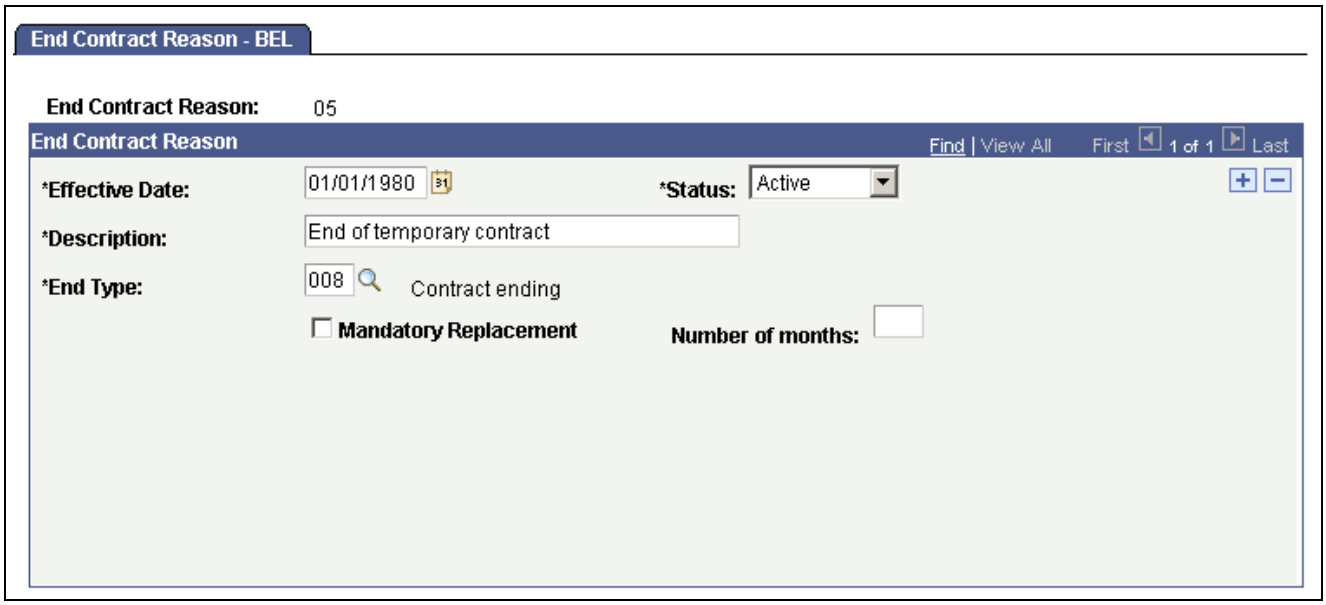
Number of months If you selected Mandatory Replacement, enter the period of time (in months) required to position the replacement.

Note. Belgian employment law mandates these requirements.

Defining Reason Codes for Ending Employment Contracts

Access the End Contract Reason - BEL page.

Copyright © 1988-2006, Oracle. All rights reserved.



End Contract Reason - BEL page

End Type Select an end type from the list of end contract type codes that were entered on the End Contract Type page.

Note. If you move out of the End Type field and then decide to change the end type code, clear and reenter the Mandatory Replacement and Number of months fields.

Mandatory Replacement and **Number of months** If you selected an end type that requires mandatory replacement, when you move out of the End Type field, the system automatically selects this check box. The system then enters the number of months that you have to replace the current employee with another employee in this contract.

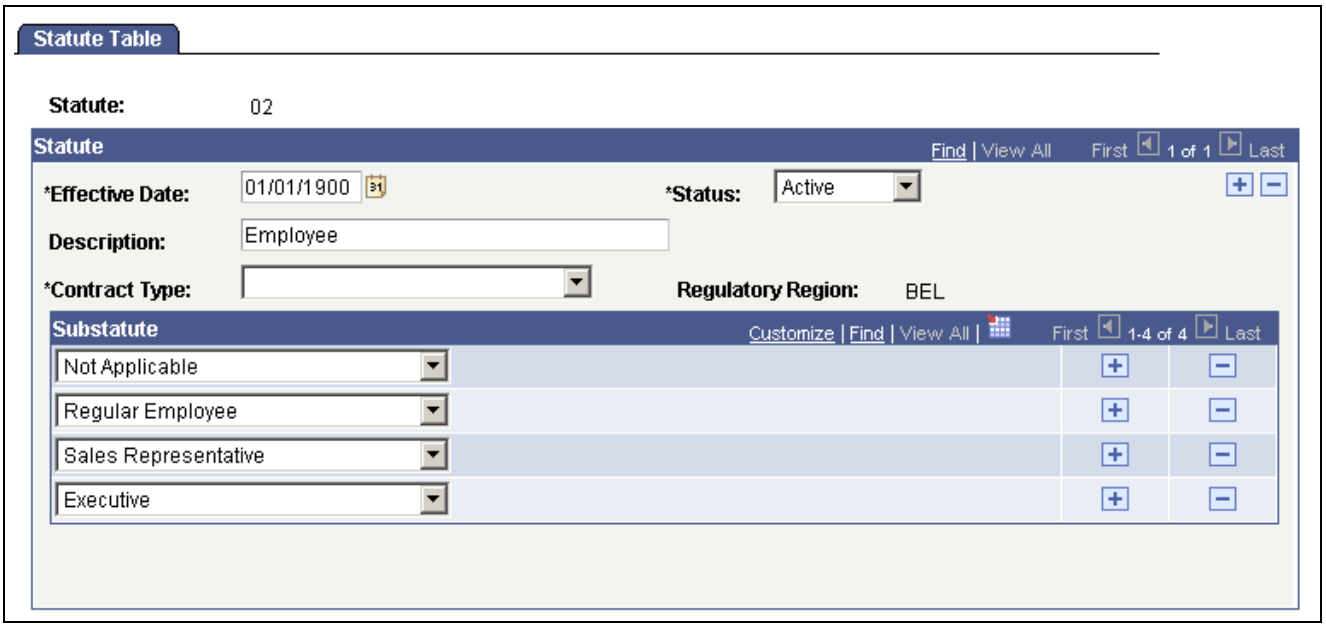
If you didn't select an end type associated with mandatory replacement information, indicate if the reason for ending an employment contract with one employee requires mandatory replacement of the former worker with another worker in the same employment contract. Then enter the number of months that can pass before you have to find the replacement employee.

Note. Belgian employment law mandates these requirements.

Setting Up Belgian Employment Contract Statutes for Claeys Calculations

Access the Statute Table page.

Copyright © 1988-2006, Oracle. All rights reserved.



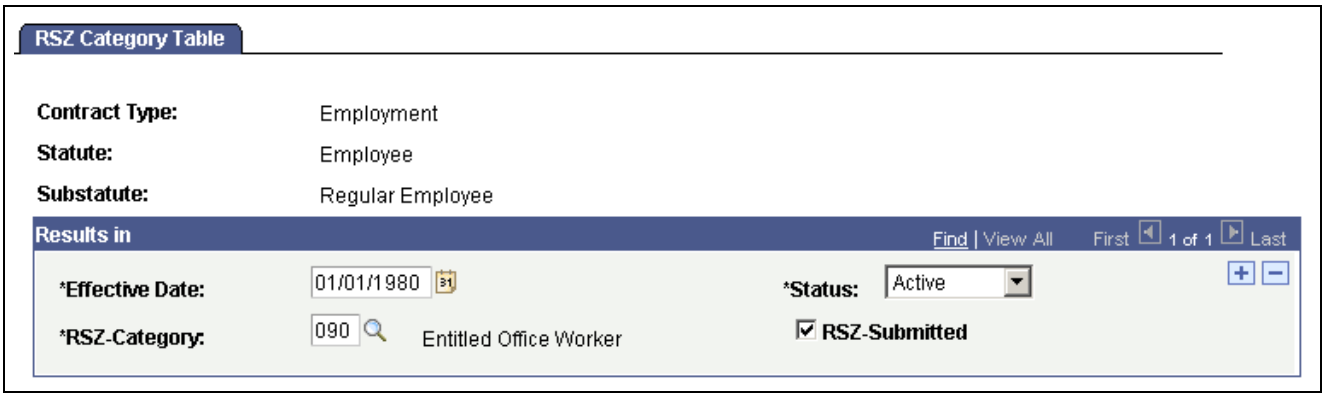
Statute Table page

Contract Type Select a contract type for the statute. Values are *Employment, Member of the professions, Non applicable,* and *Self Employed.*

Substatute Select the statute code with which the system should associate this substatute code.

Linking Contract Statutes to RSZ Categories

Access the RSZ Category Table page.



RSZ Category Table page

Use the government-defined RSZ categories to maintain social security records for your Belgian employees. Associate each combination of contract type, statute, and substatute with an RSZ category for Claeys formula calculations.

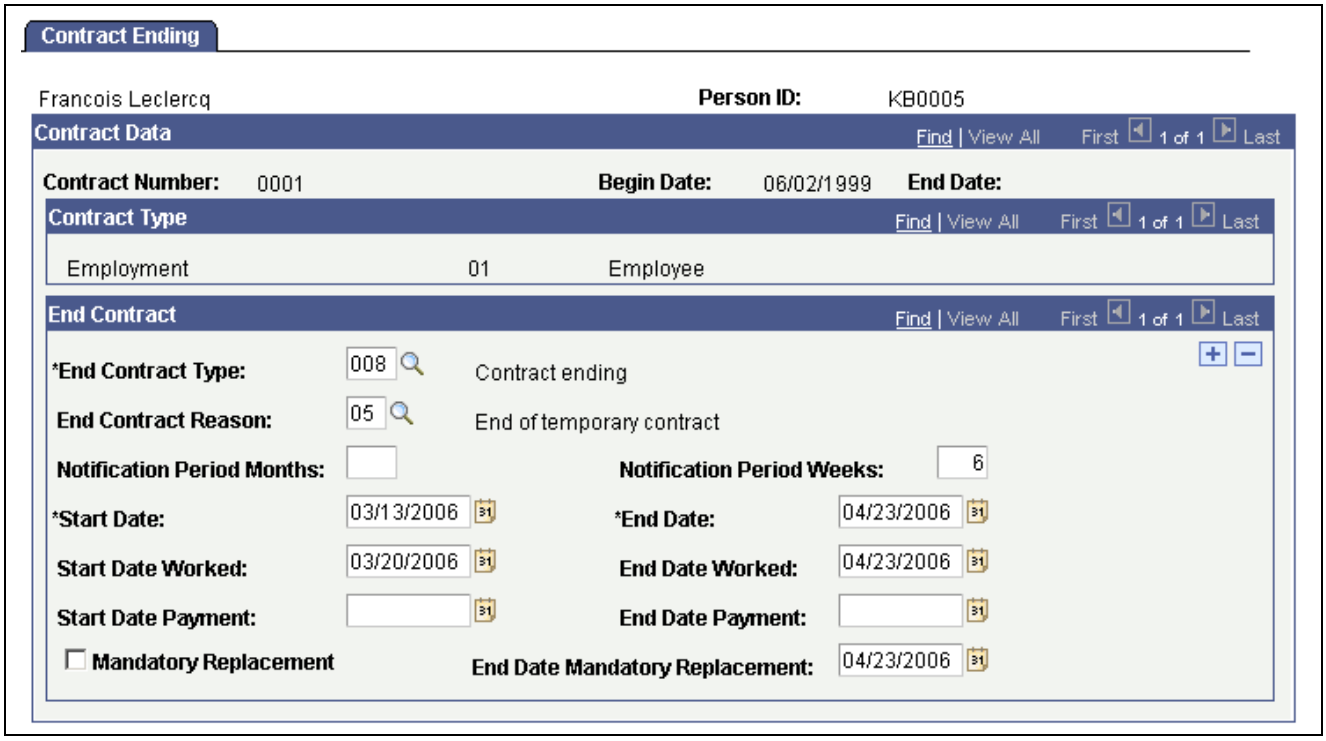
RSZ-Submitted Select to indicate that the contract is subject to RSZ. Before selecting this check box, determine whether RSZ premiums have to be paid to the Belgian social security system for the pay (wage or reimbursement) that is associated with this contract.

RSZ-Category Select an RSZ category from the list.

Copyright © 1988-2006, Oracle. All rights reserved.

Recording Information that Is Necessary for Terminating a Belgian Worker

Access the Contract Ending page.



Contract Ending page

Use this page to:

- Specify that the worker's employment contract has ended, and the reason that your organization has chosen to end the contract.
- Set up and track the worker's termination notification period.
- Track the worker's replacement if a replacement is mandatory based on the contract type.

End Contract Type Select a valid end contract type (such as death, disability, or early retirement with mandatory replacement).

End Contract Reason Select an end contract reason (such as disrupted employee relations, family reasons, a company specific program, or contract expiration).

Notification Period Months Enter the number of months of notice that the employee must be given prior to the contract end date. The notification period that you enter here affects Claeys calculations in the Create Notification component. If you enter an amount here and move out of the field, the Notification Period Weeks option becomes display-only.

Notification Period Weeks Enter the number of weeks of notice that the employee must be given before the contract end date. The notification period that you enter here affects Claeys calculations in the Create Notification component.

If you enter an amount here and move out of the field, the system makes the Notification Period Months option display-only.

Copyright © 1988-2006, Oracle. All rights reserved.

Start Date and **End Date**	Enter the date that the notification period begins, and the date on which the notification period ends and the employment contract terminates.
Start Date Worked	Record the employee's start date for this job contract, which should be the same as the date that you record for a job change in the worker's job record.
End Date Worked	Enter the employee's last working day on this job contract, which should be the same as the date that you record for a job change in the worker's job record—whether the worker is terminating with your company or leaving one job contract to move into another.
Start Date Payment and **End Date Payment**	Track the start and end payment dates, which the system stores and uses for payroll.
Mandatory Replacement	If the end contract type that you selected requires mandatory replacement, the system automatically selects this check box and makes it display-only. Specify whether an end contract type requires replacement on the End Contract Type - BEL page.
End Date Mandatory Replacement	If the end contract type requires mandatory replacement, the system calculates the end date of the mandatory replacement period based on the end date on which the employee is terminated. It also calculates the number of months that you specified on the End Employment Terms table (CNT_END_TBL_BEL) as the length of the replacement period.

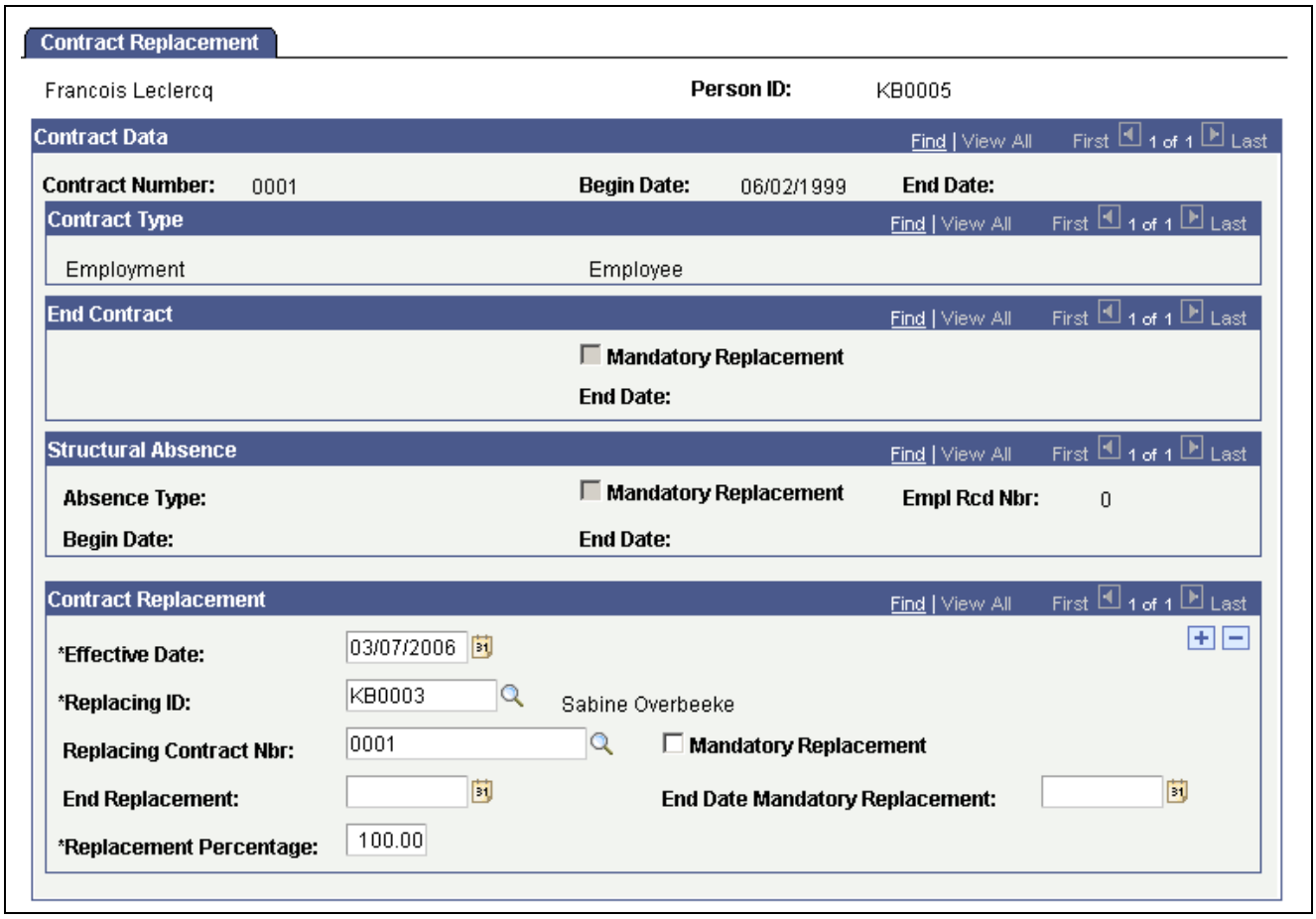
See Also

Chapter 9, "(BEL) Entering Additional Data for Belgian Workers," Defining Reason Codes for Ending Employment Contracts, page 363

Entering a Replacement Worker for the Employment Contract

Access the Contract Replacement page.

Copyright © 1988-2006, Oracle. All rights reserved.



Contract Replacement page

Replacing ID Select the ID of the employee who replaces the terminated employee in this contract. The system displays all employees who have been tagged as replacement employees for Belgian employment contracts in your human resources system. Select any applicant or employee with employment terms. If you want to hire someone as a replacing employee, you must create employment terms for that person first.

Replacing Contract Nbr (replacing contract number) Select the number for this contract, based on the replacing employee ID that you selected.

Mandatory Replacement Select to indicate that mandatory replacement is required.

End Replacement If you selected Mandatory Replacement, enter the date for the end replacement. You may want to track this date if you have an earlier than expected end date for a fixed term employment contract.

End Date Mandatory Replacement Enter the end date for mandatory replacement.

Copyright © 1988-2006, Oracle. All rights reserved.

Preparing for Severance Calculations

Employers in Belgium and organizations that employ a Belgian workforce are required to track worker information that is used in the Claeys formula calculation. This calculation determines the amount of severance compensation that your organization must pay a worker if you terminate employment. The formula considers factors such as the employee's seniority, age, and annual compensation (including salary, vacation pay, and so on) to determine your organization's liability to the employee.

This section provides overviews of how Claeys calculates severance and of how to prepare for the Claeys calculation, and discusses how to:

- Track additional seniority.
- Enter protected job leave information.

See Also

Chapter 9, "(BEL) Entering Additional Data for Belgian Workers," Performing the Claeys Calculation, page 372

Understanding How Claeys Calculates Severance

The Claeys formula calculates months of severance salary that are owed to an employee as follows:

0.89 × (seniority) + 0.08 × (employee's age) + 0.0013 × [yearly compensation in EUR divided by 1000 × (reference index divided by actual index)] − 2 = notification period, or months of severance salary that is owed to the employee.

For example, an employee with 13 years of seniority with a company, who is 38 years of age, and who is making 82.500 EUR is entitled to 13 months of severance pay. The calculation works as follows:

0.89 × 13 = 11.57 (seniority factor)

0.08 × 38 = 3.04 (age factor)

0.0013 × (82,500 / 1000) × (125.30 / 126.00) = .1066 (compensation factor)

11.57 (seniority factor) + 3.04 (age factor) + .1066 (compensation factor) 2 = 13 months of severance

Note. The value for compensation is the employee's yearly compensation. This amount is based on the employee's monthly wage multiplied by the factor that is designated in the company table for your organization. The Belgian regulated factor amount is approximately 13.9.

Understanding How to Prepare for the Claeys Calculation

Preparing for the Claeys employment compensation calculation in PeopleSoft Enterprise Human Resources involves:

- Establishing default company level information that is used for Claeys formula employee compensation calculations on the Company table (COMPANY_TBL), including factoring information defaults for calculating worker seniority, age, compensation, and so on.

  You can override this data at the employee level in the Create Notification component, where you perform the Claeys calculation for a specific worker.

- Entering and maintaining information about the employee's:

Copyright © 1988-2006, Oracle. All rights reserved.

- Seniority with your organization (stored in the PER_ORG_ASGN table).
- Age (stored in the PERSON table).
- Compensation (stored in the JOB table).

- Entering and maintaining employment contract information for the employee on the Contract Data pages (stored in the CONTRACT_DATA table).
- Entering and maintaining end employment terms information about required notification periods for workers your company may terminate (stored in the CNT_END_TBL_BEL table).
- Maintaining additional information that is used to record Belgian seniority, including protected job leave information (stored in the SENIORITY_BEL table).

See Also

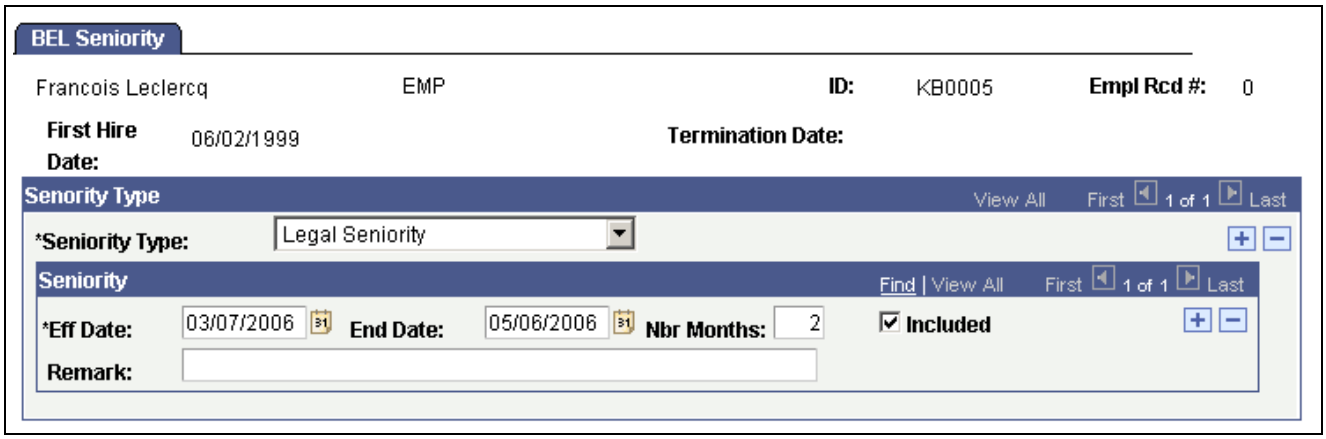
Chapter 9, "(BEL) Entering Additional Data for Belgian Workers," Performing the Claeys Calculation, page 372

Pages Used to Prepare for Severance Calculations

Page Name	Object Name	Navigation	Usage
BEL Seniority	SENIORITY_BEL	Workforce Administration, Collective Processes, Administration BEL, Identify Seniority	Track additional seniority for an employee. Seniority affects the Claeys calculation that you perform in the Create Notification component.
Protection	PROTECT_BEL	Workforce Administration, Collective Processes, Administration BEL, Create Protection	Enter protected job leave information for a Belgian employee. You can assign protection to employees who are union delegates, who take part in elections, or who have other qualifying characteristics.

Tracking Additional Seniority

Access the BEL Seniority page.



BEL Seniority page

Copyright © 1988-2006, Oracle. All rights reserved.

The system uses the seniority information for the employee recorded on this page when performing Claeys formula processing to determine the employee's months of service. If no information about service months is available on the Seniority page for an employee, the system references the employee's service months calculation on the Job Data - Job Information page.

For example, seniority in another organization may or may not count towards an employee's company seniority, depending on your own organization's business rules, but it does count towards legal seniority, which affects the Claeys calculation. This distinction is particularly important in the case of mergers between organizations, where you decide if the seniority of employees from one organization is recognized by the other organization and, if so, to what extent. Using this page, you can specify the number of months of seniority that workers can carry over to your organization from their former companies.

Seniority Type — Select the seniority type method that you want to use to determine this employee's seniority in your organization. Values are:

Company Seniority: When figuring seniority, this method doesn't account for periods of leave time that employees may use while remaining in a job, pension calculation issues, recognized service time, and so on.

The system does *not* take into account company seniority months when performing the Claeys calculation for an employee. If you enter a period for company seniority, the Claeys calculation uses only the months of seniority based on the employee's service time on their Job Data record.

Legal Seniority: The system accounts for this seniority amount when calculating the Claeys formula, which is used to calculate base pay for Belgian employees.

If you enter a period for legal seniority, the Claeys calculation takes the number of service months displayed in the Nbr Months field and adds it to the months of service from the employee's Job Data record, and displays the sum of the two amounts on the Create Notification - Base page.

Eff Date (effective date) — Enter the effective date to record the beginning of the employee's additional seniority period. The system supplies a default date, usually today's date, which you can modify to reflect the additional seniority period.

End Date — Enter the end date for the seniority period.

Nbr Months (number of months) — When you move out of the End Date field, the system calculates the number of months of seniority. The system doesn't calculate partial months. If an employee's seniority period is 100 months and 16 days, the system calculates *100* months of seniority.

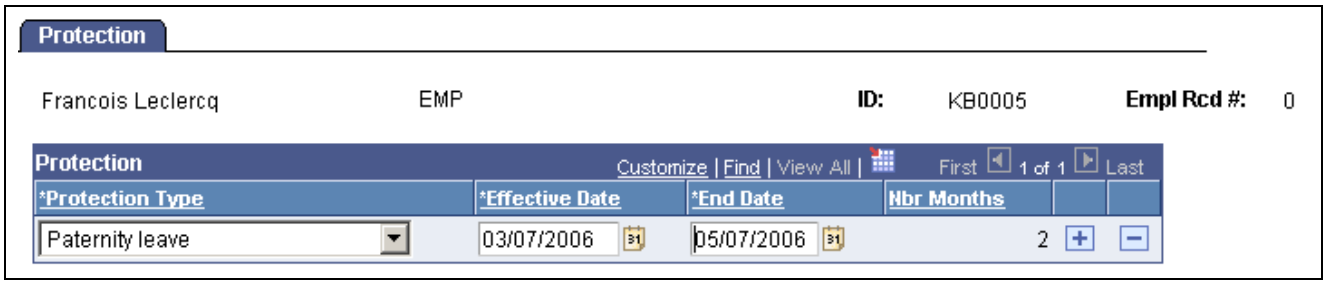
Included — Select to ensure that the system adds the months of seniority that you entered here to the employee's seniority based on their Job record (JOB) when it performs the Claeys calculation. If you clear this check box and enter *Legal Seniority* months, the system *subtracts* the seniority period from the employee's seniority when it calculates the Claeys formula.

Remark — Enter relevant remarks about the additional seniority that you are tracking.

Entering Protected Job Leave Information

Access the Protection page.

Copyright © 1988-2006, Oracle. All rights reserved.



Protection page

Protection Type Select a protection type to indicate why this leave of absence is protected.

Note. Belgian employment law mandates these protection types.

End Date Enter the date on which the employee will return to work.

Nbr Months (number of months) When you move out of the End Date field, the system calculates the duration of the protected absence.

Note. The system calculates the absence period only to the nearest month and doesn't allow for partial months. If the protected leave duration period is 45 days, the system indicates that the employee's absence covers *one* month only.

Note. The system does *not* take into account protection months when it calculates Claeys formula seniority, in part because protection isn't limited to absences from work that might affect seniority months.

Performing the Claeys Calculation

After you've hired a Belgian employee into your human resources system and established employment contract terms, end employment terms, seniority, and protected leave (protection) information, you can perform the Claeys calculation to determine your potential severance pay liability if you were to terminate the employee.

This section discusses how to:

- Review Claeys calculation variables.
- Calculate the severance amount.
- Run the Notification report.

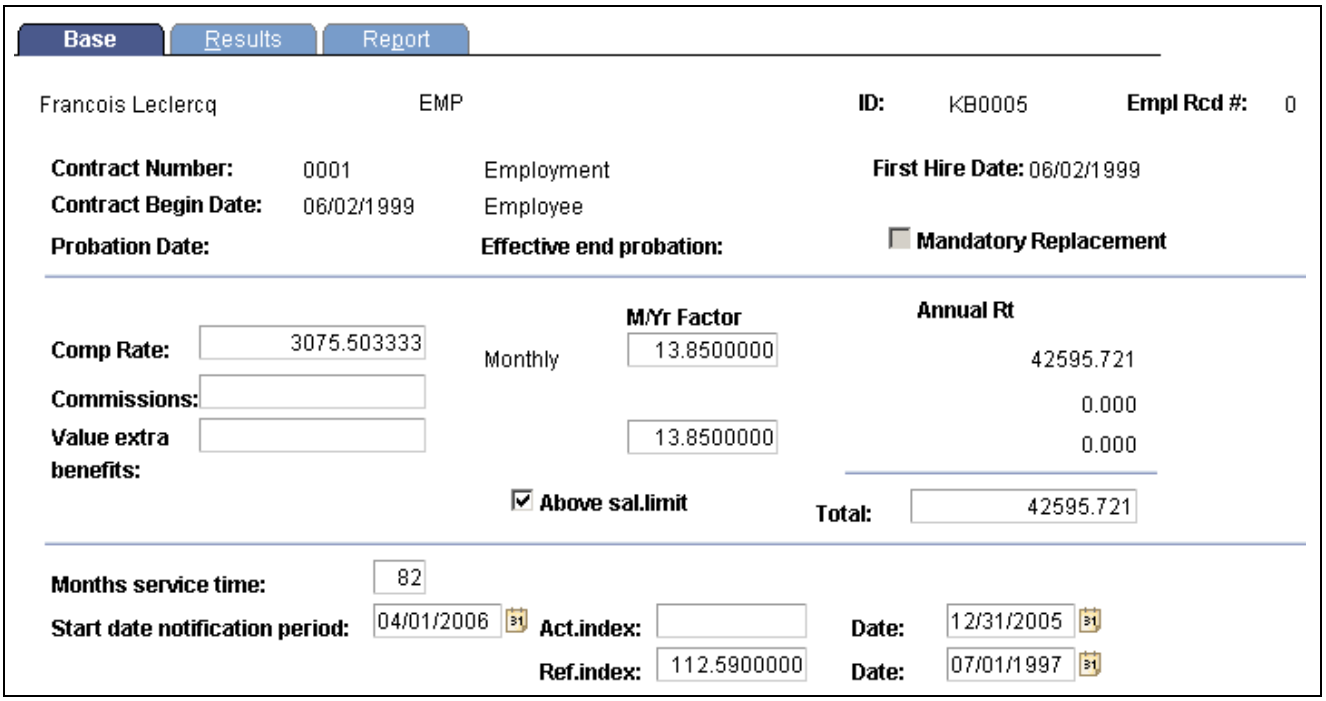
Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Perform the Claeys Calculation

Page Name	Object Name	Navigation	Usage
Base	NOTIF_CALC_BEL	Workforce Administration, Collective Processes, Administration BEL, Create Notification, Base	Review and set Claeys calculation variables, including the employee's compensation, default factor information, and months of service.
Results	NOTIF_CALC2_BEL	Workforce Administration, Collective Processes, Administration BEL, Create Notification, Results	Calculate the severance amount.
Report	RUNCTL_PER066_BEL	Workforce Administration, Collective Processes, Administration BEL, Create Notification, Report	Run the Notifications report (PER066BE).

Reviewing Claeys Calculation Variables

Access the Create Notification - Base page.



Create Notification - Base page

The system displays the employee's name, employee ID, and the employment record number for your reference. This information comes from the person's personal data record.

The system displays employment and end employment contract terms information for the employee that you entered on the Contract Data and BEL Contract Ending pages. The system displays the person's hire date from the Job Data record and indicates whether, according to the end employment terms for the worker, the contract requires mandatory replacement.

Copyright © 1988-2006, Oracle. All rights reserved.

Determining the Employee's Base Compensation Amount *(Jaarloon)*

Comp Rate (compensation rate) The system calculates the employee's monthly compensation rate based on the employee's compensation rate information on the Job Data - Compensation page and displays it here. Adjust the rate information as necessary. The system uses this amount when determining the employee's monthly pay variable for the Claeys calculation.

M/Yr Factor (month/year factor) The system multiplies the month base amount by the month/year factor of *13.85000* to calculate a value for the employee's Annual Rt (annual rate) income amount field. The default factor displayed here comes from the default employee compensation factors that you entered on the Company table. The Belgian government determines this factor amount, but you can override the default here if the factor amount changes.

Commissions Enter any commissions amount that the system should add to the employee's month base as part of the Claeys calculation income amount.

Value extra benefits Add value extra benefits amounts, including other components of nonbase pay, such as any benefits that the employee receives (for example, salary, vacation pay, 13th month, meal checks, and so on). The system multiplies the value extra benefits amount by the value extra month/year factor of *13.85000* to calculate the employee's yearly extra income amount.

Total The system displays the total compensation amount (*jaarloon*) based on the year base, the commission, and extra benefit results. Adjust the system calculated total as necessary.

Understanding the Above Salary Limit Setting

Above sal. limit (above salary limit) The system indicates if the employee's compensation total is above salary limit by accounting for the contract type. Select this check box to override the factor values on the Create Notification - Results page.

To change the salary limit setting, ensure that the notification period start date falls *after* the effective end probation date that appears with the employee's contract information at the top of the page. In this case, the system fixes the salary limit for a longer period (the system uses the factors in the Claeys Defaults group box on the Create Notification - Results page to calculate the notification period, and makes the factors available for entry).

If the date is*before* the effective end probation date, you can't change the salary limit setting.

Note. The compensation currency on the Create Notification - Base and Create Notification - Results pages is the same as the employee's job currency that is set on the employee's Job record (JOB).

Determining the Employee's Seniority

Months service time The system calculates and displays the employee's number of months service time. The system determines service month information by considering both the employee's service months information on the Job Information page (JOB_DATA) and the number of months service time on the Seniority page (SENIORITY_BEL) *if* the seniority type is set to *Legal Seniority.* The

 Copyright © 1988-2006, Oracle. All rights reserved.

system adds the two seniority amounts and displays them as the months service time amount.

The system doesn't consider partial months in this calculation and doesn't round up. If the employee's service time is 9 months, 16 days, the system displays *9* as the employee's months service time. Adjust the months service time as necessary.

Note. If you enter seniority information on the Seniority page for an employee and the seniority type is set to *Company Seniority,* the system uses the months of seniority calculation on the Job Information page to set the number of months service time on the Create Notification - Base page.

Start date notification period

Set the start date notification period for the employee's termination notification to the first day of the *next* month if you're not performing the Claeys calculation for this employee on the first day of the *current* month. The default value is the first day of the month following the effective date that appears with the contract information at the top of the page.

For example, if you start your Claeys calculation for an employee on April 14, the system enters a start date for the notification period of May 1. Override this date as necessary.

Note. The start date notification period that appears on the Base page affects the way the system performs the Claeys calculation on the Results page. If the start date notification period begins before the effective end probation date on the Base page, the system uses a notification period of *Days* on the Results page when you click the Calculation button. If you enter a start date notification period that begins after the employee's effective end probation date, the system uses a notification period of *Days, Weeks,* or *Months,* depending on the statute information for that employee on the Contract Data - Contract Type/Clauses page, as follows. If the employee is classified as a *Worker* on the Employment Terms Type page, the notification period appears in *Weeks.* The classification of *Employee* results in a notification period of *Months.* The classification of *Not Applicable* results in a notification period of *Days.*

Act. Index (actual index)

The actual index if one is assigned for this company in the Company table. The actual index is a monthly reference number to be held against the reference index number.

The actual index is used in the Claeys calculation to calculate the notification period term that is related to the yearly base on the Create Notification - Results page:

(Yearly base salary / 1000) × (factor yearly base / actual index) × correction factor)

Date

The last day of the year preceding the year in which you're performing the Claeys calculation for an employee. This date is for your reference only, and isn't saved when you save the page.

Ref. Index (reference index)

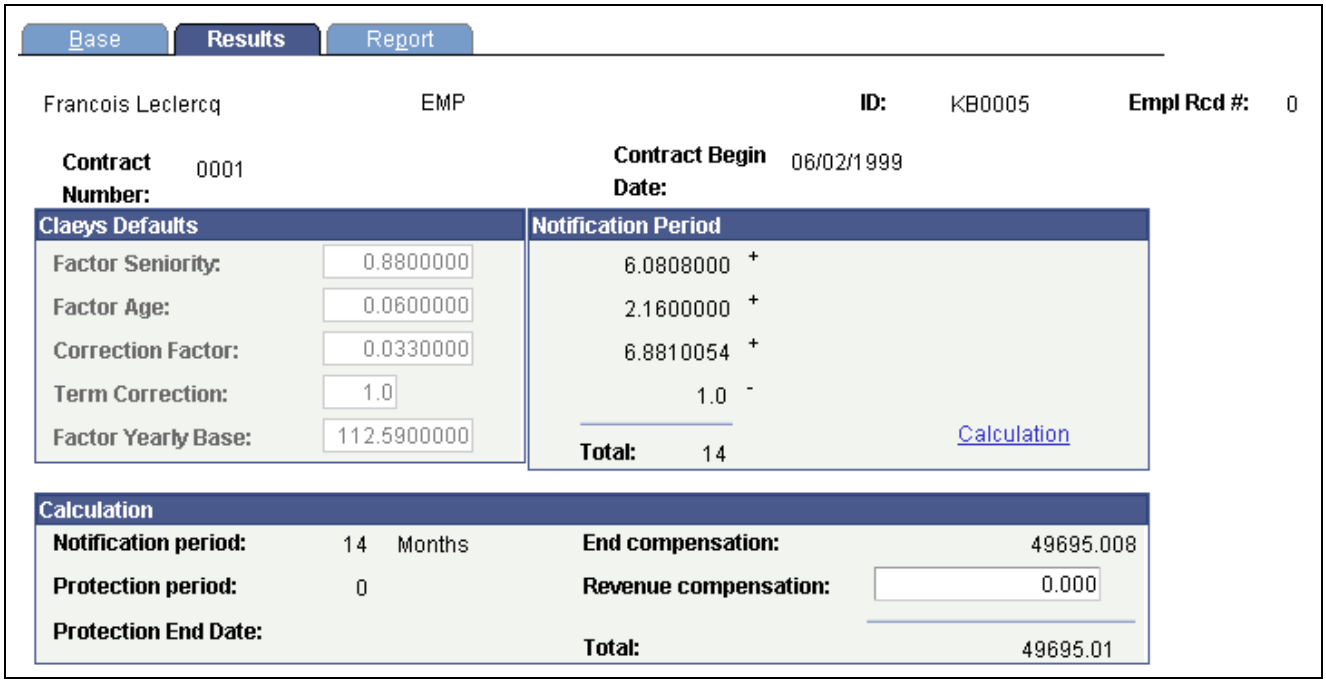
You can also update the reference index or accept the system default that is based on the factor yearly base index that is set up on the Company Table-Default Settings, Claeys Defaults for this company. The reference index is a yearly reference amount to be compared against the actual index amount.

Copyright © 1988-2006, Oracle. All rights reserved.

Date The system also displays the reference index date. The system sets this date to the beginning of the last half of the year prior to the year in which you're performing the Claeys calculation. This date is for your reference only, and isn't saved when you save the page. The system doesn't use the reference index as part of the Claeys calculation.

Calculating the Severance Amount

Access the Create Notification - Results page.



Create Notification - Results page

The system displays the Claeys defaults for Factor Seniority, Factor Age, Correction Factor, Term Correction, and Factor Yearly Base from the Company table for this employee's company. You assigned the company on the Job Data - Work Location page. Change these factors at the employee level on this page *only* if you selected the Above sal. limit check box on the Create Notification - Base page.

Note. The system uses these Claeys default factors as part of the Claeys calculation only when the Above sal. limit check box is selected on the Create Notification - Base page.

When you first open this page, the Notification Period and Calculation group boxes are empty. This is where the system displays the results of the Claeys calculation for this employee after you perform the calculation by selecting the Calculation link.

The system displays the calculated notification period for this employee in the Calculation group box and shows how it calculated the notification period in the Notification period group box.

How the System Calculates the Notification Period

The system calculates the notification period in one of two ways depending on whether the employee's yearly base salary is above the salary limit:

Copyright © 1988-2006, Oracle. All rights reserved.

- If the employee's yearly base salary is *above the salary limit* (Sal limit check box selected), the notification period that appears in the Calculation group box is based on the calculations that appear in the Notification Period group box.

  The system calculates the notification period based on the employee's seniority, age, and compensation:

  Seniority term = (months service time / 12) × factor seniority

  Note. For the Seniority Term amount, the system rounds the division by 12 differently for each month.

  Age term = employee's age on notification start date × factor age.

  Compensation term = (base total / 1000) × (factor yearly base / actual index) × correction factor.

  Total notification period = seniority term + age term + compensation term - term correction.

  You can tell if you're using the above salary limit method by the way the page looks when you perform the calculation. If the system used the above salary limit method to determine the notification period, it displays the notification period calculation in the Notification Period group box. The Claeys defaults that appear on the page are also available for entry, though these come from the company defaults for the employee's company and probably shouldn't be changed.

- If the employee's base isn't above the salary limit (the Above sal. limit check box is cleared), the notification period amount is based on the statute, service time, probation end date, and notification start date—without accounting for any of the Claeys defaults factors that appear on the page. In this case, the system calculates the employee's notification period as follows:

```
If the Statute is "Worker"
if Notification Start Date <= Effective Probation End Date, then Period is "0"
if the Service Time is lower than 240 Months (20 years) the Period is "4"
else the Period is "8"
If the Statute is "Employee"
if Notification Start Date <= Effective Probation End Date, then Period is "7"
else the Period is (((Service Time / 12) / 5) +1) ×3 ⇒
(each division is truncated with zero decimals)
Else the Period is "0"
```

  The unit of time for the notification period information is based on the employee's statute type that you established on the Contract Data - Contract Type/Clauses page (CONTRACT2) as defined on the Statute Table page (STATUTE_TBL_BEL). When the statute type is set to *Worker,* the period unit is in *Weeks.* When the statute is for an *Employee,* then the period unit is in *Months.* If the statute is anything other than worker or employee, the period unit is *Days.* Whenever the notification start date falls within the probation period, the unit of time is always *Days.*

Understanding Protection Period Information

The system compares the end date for any of this employee's qualifying protection periods that you recorded on the Protection table (PROTECTION_BEL) to the notification start date recorded on the Belgian Notification Calculation table (NOTIF_CALC_BEL) to determine the value for the Protection period field. This method of comparison ensures that the employer respects the employee's protection rights.

Note. The protection period isn't included in the Claeys calculation process.

The system also displays the Protection End Date field, which is the *actual* end date of the protection period if any protected leave time is entered for this employee on the Protection page. This is the date that you set as the end date for any qualifying protection period that you specified on the Protection page.

Copyright © 1988-2006, Oracle. All rights reserved.

Working with the End Compensation Amount

The End compensation field displays the resulting Claeys calculation amount that you owe this employee as severance pay, as calculated by the system.

Depending on the notification period unit of time, the system calculates the end compensation by dividing the yearly base total (displayed on the Create Notification, Base page) by 12 if the notification period is months, 52 if weeks, or 365 if days. The result is then multiplied by the notification period amount to arrive at the end compensation amount. For example, the end compensation amount calculation for Guido Peeters is:

(31576.25 / 12) * 11 = 28944.89

Any amount that you enter in the Revenue compensation field is added to the total severance amount for the employee.

If you need to change the notification data and rerun the calculation, make your changes and click the Calculation link again. The system clears the old results and calculates the Claeys amount based on your changes.

Warning! The system does not save this data. You must run the Notification report to maintain records for each calculation.

Running the Notification Report

Access the Create Notification - Report page.

After completing the Claeys calculation, run the termination notification report. The report page displays the employee's ID and record number together with the notification period that is calculated by the Claeys formula.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," (BEL) Entering Default Information and Salary Factors

Generating DIMONA Notifications

This section provides an overview of DIMONA notifications and discusses how to:

- Create DIMONA notifications.
- Review DIMONA notifications.

Understanding DIMONA Notifications

The Belgian E-government Social Security plan requires companies to report social insurance data for workers employed under Belgium regulations. DIMONA notifications contain the required data.

The Create DIMONA Notification process (HRBEL_DIM_AE) generates DIMONA notifications as flat files. The PeopleSoft system supports employee hire and employee termination DIMONA notifications, including corresponding updates and cancellations. You can generate notifications for a single employee, for a company, or for a business unit.

 Copyright © 1988-2006, Oracle. All rights reserved.

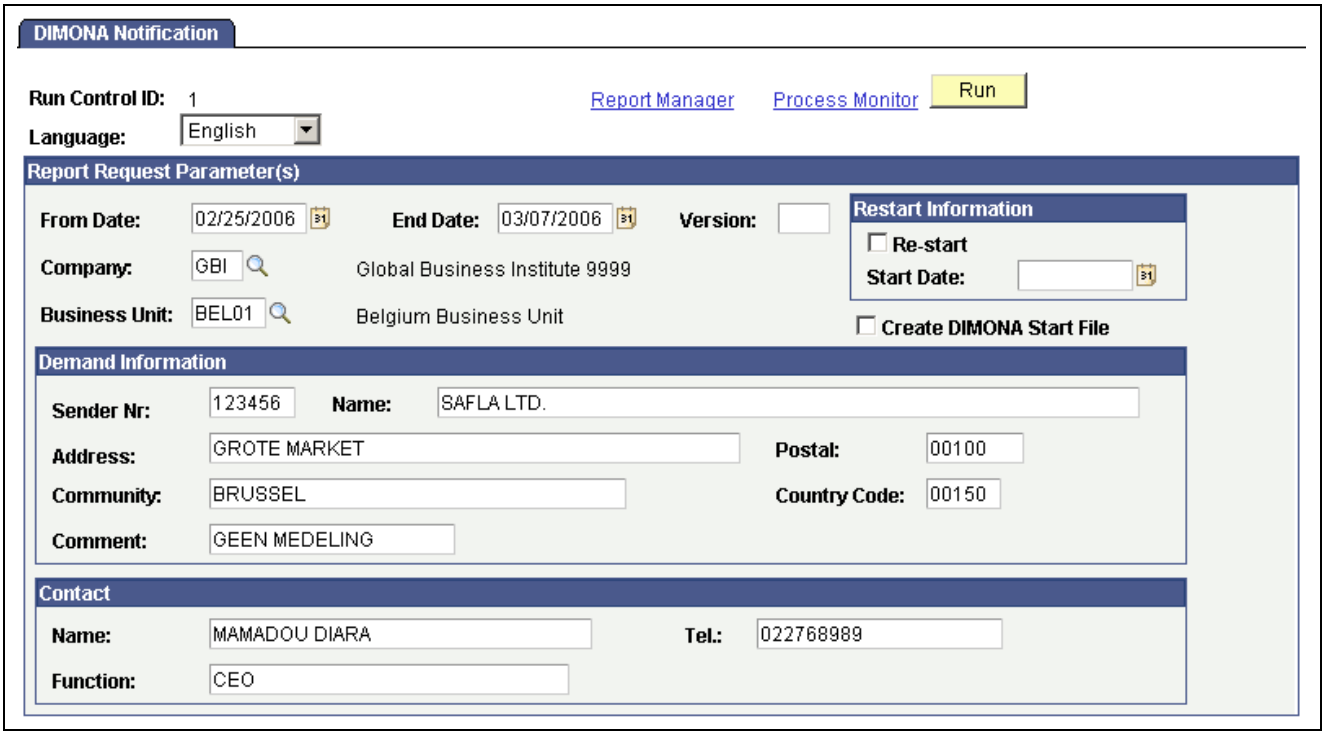
After you have generated flat files containing the notifications, you can transfer the flat files to the National Office for Social Security (NOSS), known as RSZ or ONSS in Belgium, using the NOSS file transfer protocol server. After you transfer data to the NOSS, you can consult and update employee data by using the NOSS database system.

Pages Used to Generate DIMONA Notifications

Page Name	Object Name	Navigation	Usage
DIMONA Notification	HR_DIMONA_CNTL_BEL	Workforce Administration, Collective Processes, Administration BEL, Create DIMONA Notification	Create DIMONA notifications.
Review Notification	HR_DIMONA_RVW_BEL	Workforce Administration, Collective Processes, Administration BEL, Review DIMONA Notification	Review DIMONA notifications.

Creating DIMONA Notifications

Access the DIMONA Notification page.



DIMONA Notification page

Report Request Parameters

From Date and **End Date** Enter begin and end dates for the period to include in the DIMONA notification.

Version Enter the DIMONA version number (from the first page of the Glossarium) used when creating the DIMONA file.

Copyright © 1988-2006, Oracle. All rights reserved.

Company and **Business Unit** Enter the company or business unit for which to create a DIMONA notification.

Create DIMONA Start File Select to indicate that this is the initial DIMONA creation. When selected, the DIMONA file contains all employees and workers.

Restart Information

Re-start Select to indicate that an existing notification needs to be recreated. The system processes only those notifications that have been reviewed and set to *Re-do* on the Review Notification page.

Start Date Select the process date of the original notification that needs to be recreated.

Demand Information

Enter information about the person who is sending the notification.

Sender Nr (sender number) Enter the number that the NOSS assigned to the person who is sending the notification.

Community Enter the sender's city.

Country Code Enter the sender's National Institute for Statistics (*Nationaal Instituut voor de Statistiek*) (NIS) country code.

Contact

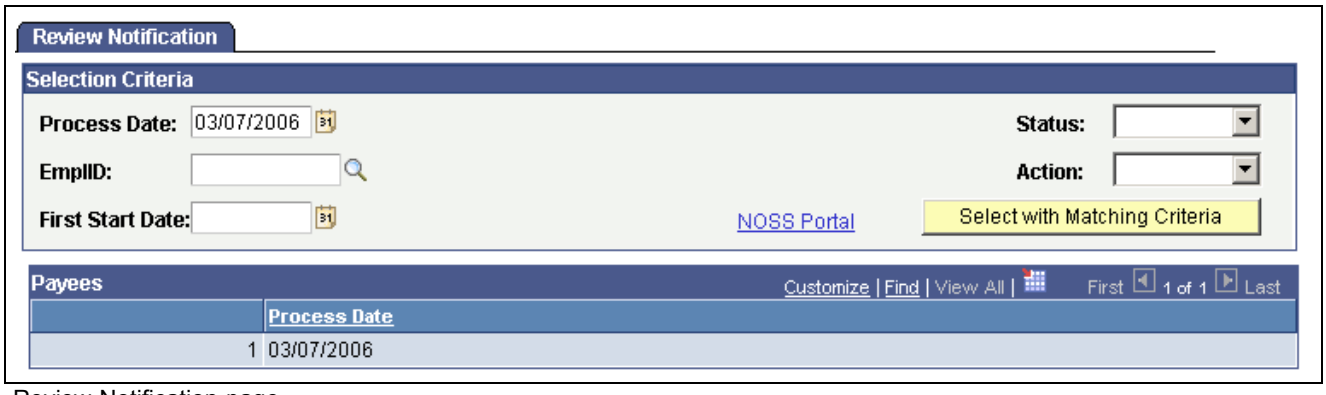
Name, Function, and **Tel.** (telephone number) Enter the name, function, and telephone number of the person whom the NOSS can contact in case a problem occurs with the file.

HRBEL_DIM_AE Process

The HRBEL_DIM_AE process selects all employees that have been hired or terminated, based on personal and job data, and creates a notification for them. The process creates notification flat files according to the NOSS standard, and names the file according to NOSS naming conventions.

Reviewing DIMONA Notifications

Access the Review Notification page.



Review Notification page

Process Date (Optional) Enter the date that the notification was processed.

Copyright © 1988-2006, Oracle. All rights reserved.

EmplID	(Optional) Enter the employee ID of the notification to review.
First Start Date	(Optional) Enter the hire date of the notification to review.
NOSS Portal	Click to access the NOSS website. From this page, you can log on to the NOSS web server to check the latest information about the DIMONA notification or other information about Belgian social security.
Status	(Optional) Select the status of the notification to review: *Cancel, Delete, Done,* or *Re-do.*
Action	(Optional) Select the action reported by the notification: *Cancel, Hire, Terminate,* or *Update.*
Select with Matching Criteria	Click to populate the Payees group box with information on the notifications that match your criteria.
DIMONA Nr (DIMONA number)	Enter the notification number that is assigned by NOSS.

Update and Termination Notifications

Using this page and the DIMONA Notification page, you can create update and termination notifications.

To create single employee update and termination notifications:

1. Access the Review Notification page.
2. Enter the process date and the employee ID.
3. Click Select with Matching Criteria.
4. Set the notification action to *Update* or *Terminate.*
5. Set the notification status to *Re-do.*
6. Save the page.
7. Access the DIMONA Notification page.
8. Select the Re-start check box and enter the process date in the Start Date field.
9. Run the HRBEL_DIM_AE process.

To create update and termination notifications for more than one employee, follow the same steps as for a single employee notification, except:

- In step 2, enter the process date and any additional criteria.
- Perform steps 4 and 5 for all employees to include in the notification.

Running the Social Report

This section lists the page used to run the Belgian Social report.

Copyright © 1988-2006, Oracle. All rights reserved.

Page Used to Run the Social Report

Page Name	Object Name	Navigation	Usage
Social Report	RUNCTL_PER067_BEL	Workforce Administration, Workforce Reports, Social Report BEL	Run the Social Report (PER067BEL), which reports a variety of employer and employee information that is required by the government.

Copyright © 1988-2006, Oracle. All rights reserved.

CHAPTER 10

Managing Country-Specific Workforce Data

This chapter discusses how to:

- (BRA) Provide additional information for Brazilian employees.
- (CAN) Provide additional information for Canadian employees.
- (CHE) Run the Company Statistics report.
- (FRA) Provide additional information for French workers.
- (NLD) Record and report *Wet Stimulering Arbeidsdeelname* (SAMEN) diversity information for Dutch workers.
- (ITA) Record additional hiring data for Italian workers.
- (ITA) Record end of employment information for Italian workers.
- (ITA) Run the Equal Opportunities report.
- (USA) Manage I-9 Information.
- (USA) Determine U.S. residency status for foreign nationals.

(BRA) Providing Additional Information for Brazilian Employees

This section discusses how to enter additional SEFIP data for Brazilian employees.

Page Used to Enter Additional Data for Brazilian Employees

Page Name	Object Name	Navigation	Usage
Additional Information BRA	ADDL_INFO_BRA	Workforce Administration, Job Information, Additional Information BRA, Additional Information BRA	Enter additional worker information.

(CAN) Providing Additional Information for Canadian Employees

There are a few issues that are unique to a Canadian workforce.

Copyright © 1988-2006, Oracle. All rights reserved.

Note. While the Ontario Employment Equity Commission (OEEC) no longer requires employees in Ontario to complete workforce surveys, the PeopleSoft system continues to offer Ontario Employment Equity (OEE) reporting functionality.

This section discusses how to:

- Enter OEEC workforce survey responses.
- Record employee-level information about official language use.

 Copyright © 1988-2006, Oracle. All rights reserved.

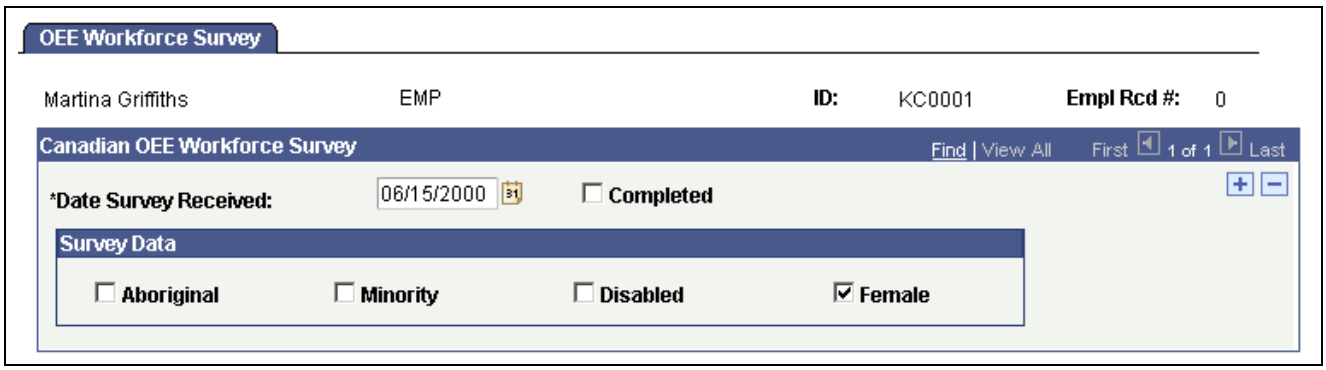
Pages Used to Provide Additional Information for Canadian Employees

Page Name	Object Name	Navigation	Usage
OEE Workforce Survey	CAN_OEE_SURVEY	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Workforce Survey Result, OEE Workforce Survey	Enter OEEC workforce survey responses.
Official Languages	PERS_OFFLNG_CAN	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Official Languages, Official Languages	Record employee-level information about the use of official languages. The information stored in this page is used for the Official Languages reports that you submit to the Canadian government, in accordance with the Official Languages Act.
OEE Groups by OCC Group	RUNCTL_FTCANAC	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups by OCC Group Report, OEE Groups by OCC Group	Generate the OEE Groups by OCC Group report (PER103CN). The report lists the totals of active employees, within the defined area codes, employed within the date range.
OEE Groups by Employment Type	RUNCTL_FTCANAC	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups by Emplymt Type Rpt, OEE Groups by Employment Type, OEE Groups by Employment Type	Generate the OEE Groups by Employment Type report (PER104CN).
OEE Groups/Jobs Filled/Vacated	RUNCTL_FTCANAC	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Groups/Jobs Filled/Vacated, OEE Groups/Jobs Filled/Vacated	Generate the OEE Groups by Jobs Filled/Vacatd report (PER106CN), which lists the totals of active employees, within the defined area codes, employed within the date range.
OEE Workforce Survey Stats	RUNCTL_PER105CN	Workforce Administration, Personal Information, OEE Workforce Survey CAN, Workforce Survey Stats, OEE Workforce Survey Stats	Run the OEE Work Force Survey Stats report (PER105CN). The OEE Work Force Survey Stats report lists the number of surveys received and the numbers that were completed.

Copyright © 1988-2006, Oracle. All rights reserved.

Entering OEEC Workforce Survey Responses

Access the OEE Workforce Survey page.



OEE Workforce Survey page

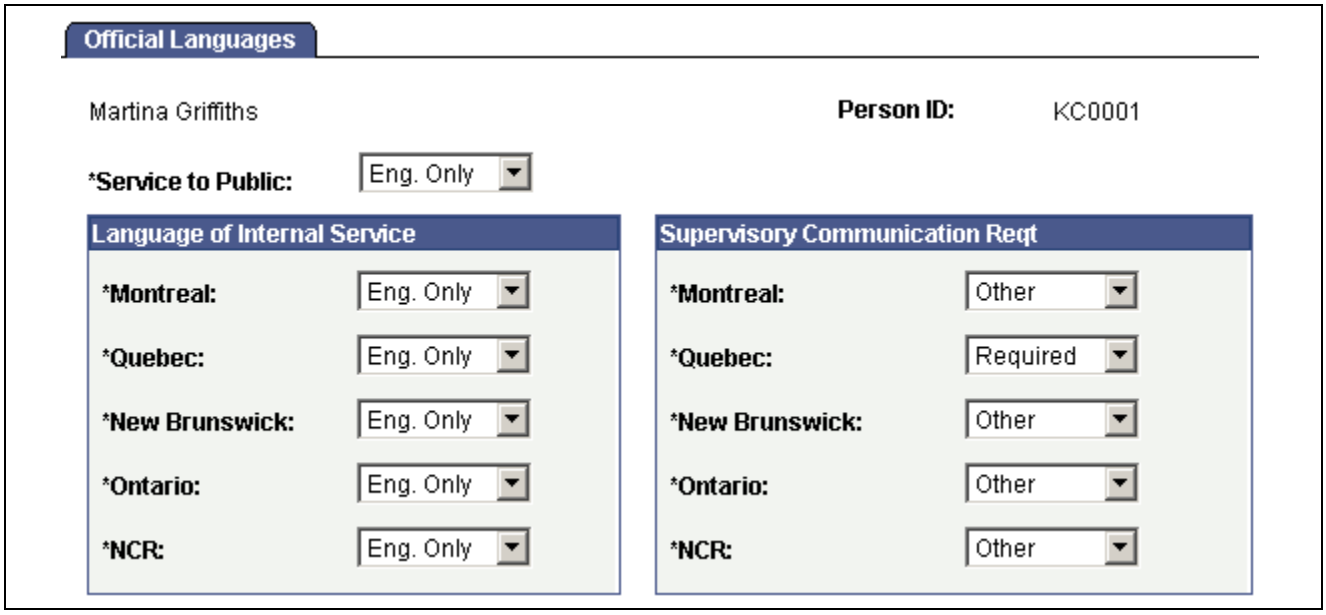
Date Survey Received Enter the date on which the survey was received. The default is the system date, which is usually today's date. Change this date if necessary.

Completed Select to indicate that the survey was completed.

Survey Data Indicate whether the survey respondent is *Aboriginal, Minority, Disabled,* or *Female.*

Recording Employee-Level Information About Official Language Use

Access the Official Languages page.



Official Languages page

Service to Public Indicate which languages the employee uses to provide service to the public.

Copyright © 1988-2006, Oracle. All rights reserved.

Language of Internal Service

Montreal, Quebec, New Brunswick, Ontario, and **NCR** (National Capital Region)

For the locations listed in this group box, indicate which languages the employee uses to communicate internally. Select *N/A (not applicable)* for those locations that don't apply.

Supervisory Communication Reqt (Supervisory Communication Required)

Montreal, Quebec, New Brunswick, Ontario, and **NCR** (National Capital Region)

For the locations listed in this group box, indicate which languages the employee requires for supervisory communication. Select *N/A (not applicable)* for those locations that don't apply.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements, "(CAN) Meeting Regulatory Requirements for Canada," Running Official Languages Reports

(CHE) Running the Company Statistics Report

The Swiss Federal Department of Statistics requires all Swiss companies to create this report every 10 years.

Page Used to Run the Company Statistics Report

Page Name	Object Name	Navigation	Usage
Company Statistics	RUNCTL_PER001_CHE	Workforce Monitoring, Company Statistics CHE, Company Statistics	Run the Company Statistics report (PER001CH). This report provides information on employee wages, occupations, and other data necessary for the Company Statistics report *(Betriebszaehlung)*. If GP Switzerland is installed, the payroll offers two statistic reports that replace this one—the BESTA Statistics (GPCHST01.SQR) and Salary Structure Analysis (GPCHST02.SQR) reports. See *PeopleSoft Enterprise Global Payroll for Switzerland 9.0 PeopleBook*, "Generating Payslips and General Payroll Reports," Running General Payroll Reports for Switzerland.

Copyright © 1988-2006, Oracle. All rights reserved.

(FRA) Providing Additional Information for French Workers

This section discusses how to:

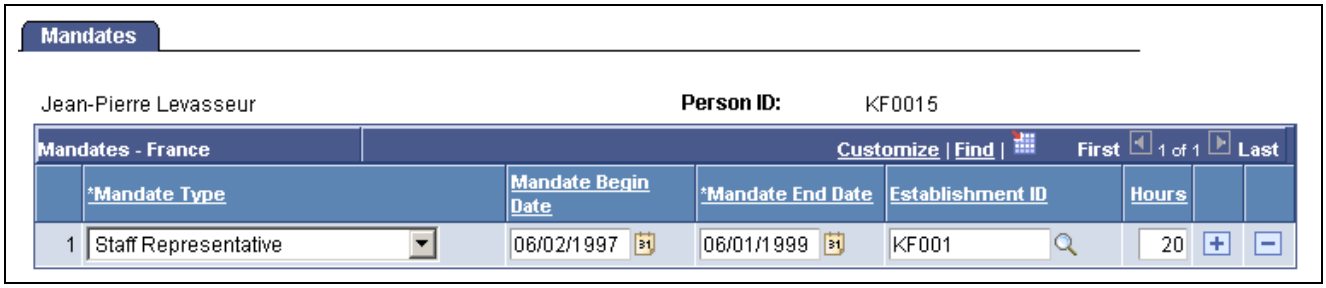
- Track mandate information.
- Enter worker military service information.

Pages Used to Provide Additional Information for French Workers

Page Name	Object Name	Navigation	Usage
Mandates	MANDATES_FRA	Workforce Administration, Job Information, Mandates FRA, Mandates	Track mandate information for French workers.
Military Situation	MILIT_SITUATN_FRA	Workforce Administration, Personal Information, Biographical, Military Situation FRA, Military Situation	Enter worker military service information, including the branch of the armed forces in which the worker served, and the worker's ID number, grade, and reserve status.

Tracking Mandate Information

Access the Mandates page.



Mandates page

Mandate Type Select a mandate type.

Mandate Begin Date and **Mandate End Date** Enter the mandate begin and end dates during which the worker was associated with the mandate type.

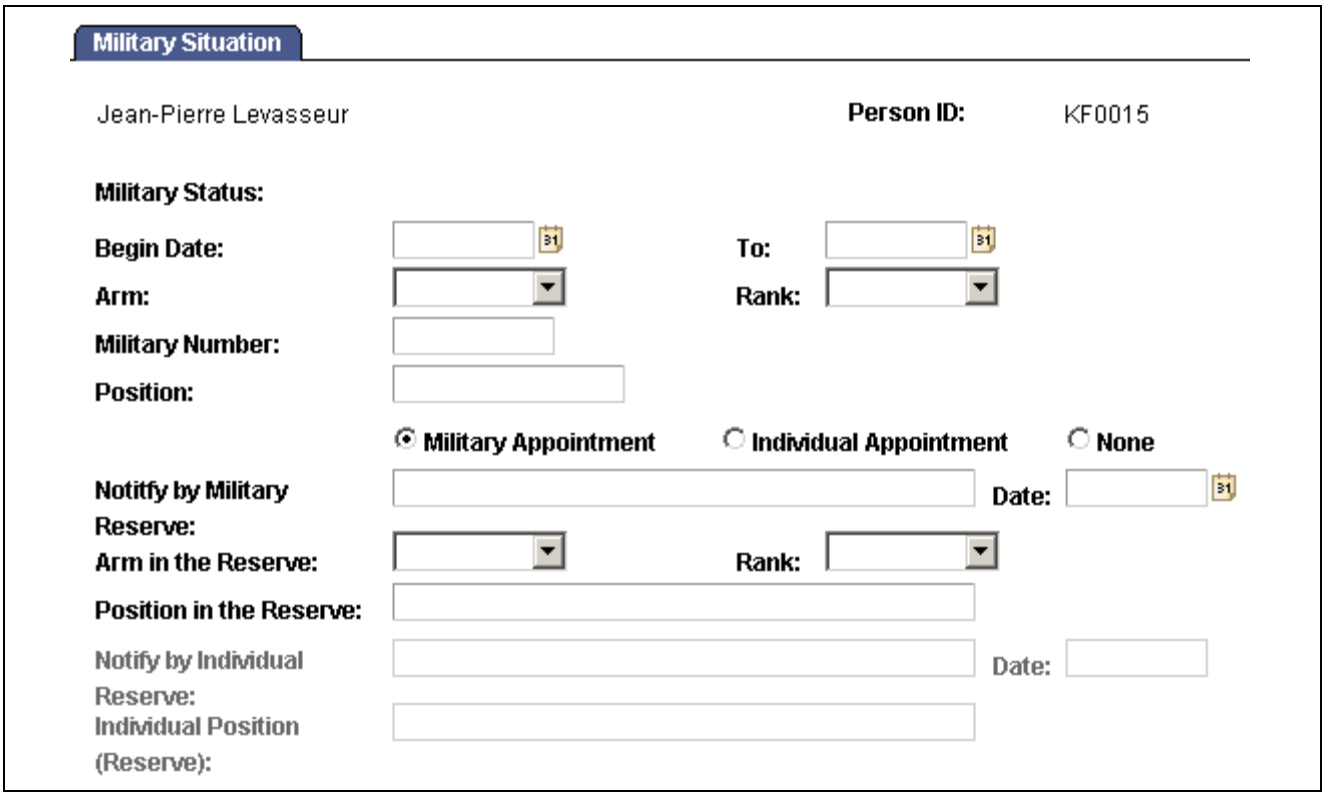
Establishment ID Select an establishment ID.

Hours Indicate the number of hours for the mandate, if appropriate.

Entering Worker Military Service Information

Access the Military Situation page.

Copyright © 1988-2006, Oracle. All rights reserved.



Military Situation page

Begin Date and **To Date** — Indicate the begin and end date for the worker's military service.

Arm — Select the arm of the military in which the worker served.

Rank, Military Number, and **Position** — Indicate the worker's rank, military number, and position if known.

Military Appointment, Individual Appointment, and **None** — Indicate if the service was the result of a military appointment, an individual appointment, or none (to indicate that the worker wasn't appointed to the position).

If the worker had a military appointment, enter additional reserve information.

Notify by Military Reserve — Enter the appropriate Notify by Military Reserve information.

Date — Enter the date of notification.

Arm in the Reserve — Enter the worker's arm in the reserve.

Rank — Enter the worker's rank.

If the worker has an individual appointment, enter additional information.

Notify by Individual Reserve — Enter the appropriate Notify by Individual Reserve information.

Date — Enter the date of notification.

Individual Position (Reserve) — Enter the worker's individual position in the reserve.

Copyright © 1988-2006, Oracle. All rights reserved.

(NLD) Recording and Reporting SAMEN Diversity Information for Dutch Workers

This section provides an overview of the SAMEN diversity law and SAMEN registration and discusses how to:

- Establish a worker's ethnic status.
- Run the NLD Law SAMEN Statistics report.

Note. Since December 31, 2003, the SAMEN law has not been a legislative requirement. However, PeopleSoft maintains the functionality to allow you to track diversity in your company.

Understanding the SAMEN Diversity Law and SAMEN Registration

If you have a Dutch workforce, you need to track information on the national origin of an employee's birth parents. This information establishes the ethnic status of workers, which complies with the SAMEN diversity law, or the "law to promote equal labor participation for persons of a different ethnic origin" in the Netherlands.

The SAMEN law provides for equal employment opportunities for immigrant workers or their children or both. The birth country of either the employee or one of the employee's parents determines whether the employee qualifies as a SAMEN employee and can be recorded as such for reporting to the Dutch government. Children of immigrant workers are subject to this law as well, even if they were born in the Netherlands, and even if the parents have been naturalized in the meantime, as long as one of the parents was born in one of the SAMEN countries. Every two years, the Dutch Ministry Of Social Affairs reviews the list of countries that are designated as SAMEN countries. This decision depends mainly on employment statistics for immigrant workers (and their children) from certain countries.

If the employee qualifies and has no objection to SAMEN registration, record the birth country of the employee's mother and father. When you select a birth country for the employee's parents, you can choose only from among those countries stored in the Country table (COUNTRY_TBL). The system indicates if the birth country is one of the SAMEN countries stored in the NLD SAMEN Country table. When the selected country is *IDN* (Indonesia), an additional category appears, which indicates an additional choice to fulfill SAMEN ID requirements.

Pages Used to Record and Report SAMEN Diversity Information for Dutch Workers

Page Name	Object Name	Navigation	Usage
SAMEN Registration	SAMEN_NLD	Workforce Administration, Personal Information, Diversity Compliance NLD, Law SAMEN Registration, SAMEN Registration	Establish worker ethnic status to comply with the SAMEN diversity law for a qualifying Dutch worker.
WBEAA Data - NLD	RUNCTL_PER038_NL	Workforce Administration, Personal Information, Diversity Compliance NLD, Law SAMEN Report, WBEAA Data - NLD	Run the NLD Law SAMEN Statistics report (PER038NL).

Copyright © 1988-2006, Oracle. All rights reserved.

Establishing a Worker's Ethnic Status

Access the SAMEN Registration page.



SAMEN Registration page

Objection Registration Select if the employee objects to being included in the SAMEN reporting to the Dutch government. If selected, the system won't include the employee when you generate the SAMEN report.

Included in Target Group Select to include the employee in the SAMEN reporting to the Dutch government. This field is available for entry only when one parent comes from a target group.

SAMEN Identification

Birth Country Displays the employee's birth country.

Note. The system always displays the employee's birth country and indicates if it is one of the SAMEN countries stored in the NLD SAMEN Country table.

Father's Birth Country and **Mother's Birth Country** Select the birth country of the employee's father and mother.

Category This field appears if a birth country is *IDN* (Indonesia). Select one of these values to fulfill SAMEN ID requirements:

- *Former Netherlands East Indies:* (born in Indonesia before December 27, 1949).
- *Incl. Law Rietkerk-uitkering:* (in Register 1b, *Rietkerk-uitkering* law).
- *Indonesia (after 27-12-1949):* (born in Indonesia after December 27, 1949).

Copyright © 1988-2006, Oracle. All rights reserved.

In Target Group The system automatically selects this check box if the birth country for the employee, employee's father, or employee's mother is one of the countries stored in the NLD SAMEN Country table.

Running the NLD Law SAMEN Statistics Report

Access the WBEAA Data - NLD page.

The Law SAMEN Statistics report (PER038NL) produces the required SAMEN statistics information. The reports lists the number of people in the workforce who were born in a SAMEN country, or one of whose parents was born in one.

(ITA) Recording Additional Hiring Data for Italian Workers

This section discusses how to run the Matricula Book Calculation process.

 Copyright © 1988-2006, Oracle. All rights reserved.

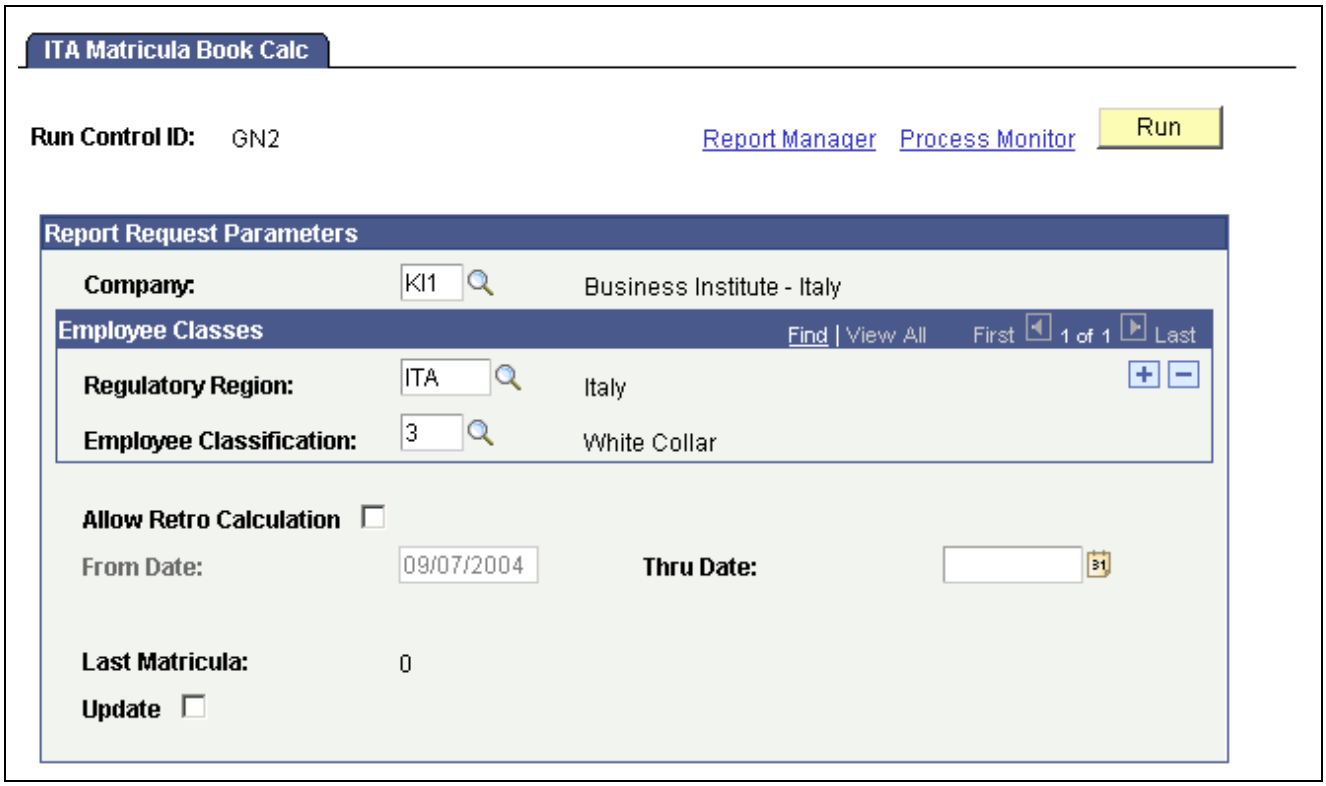
Pages Used to Record Additional Hiring Data for Italian Workers

Page Name	Object Name	Navigation	Usage
ITA Employee Documentation	EMPL_DOC_ITA	Workforce Administration, Job Information, Employment Categorization ITA, Documents, ITA Employee Documentation	Record an employee's workbook code and employment eligibility, or C1 declaration code and release date.
ITA Employee Job Letter	EMPL_JOBLTR_ITA	Workforce Administration, Job Information, Employment Categorization ITA, Job Letters, ITA Employee Job Letter	Use the ITA Employee Job Letter page to print the hiring letter to be signed by both employee and employer on or before the first day of employment. The page displays company, labor agreement, and employee category information. Select the Print Letter check box and enter the date. Select Save to print the letter.
Empl Comp Cd Ita (employee company codes, Italy)	EMPL_COMP_CD_ITA	Workforce Administration, Job Information, Employment Categorization ITA, Company Codes, Empl Comp Cd Ita	Use the Empl Comp Cd Ita page to link employees with company INAIL, INPS, PREV, INPDAI, and CIA codes.
Personal/Job Data	EMPL_MATR_BOOK_ITA	Workforce Administration, Job Information, Employment Categorization ITA, Matricula Book, Personal/Job Data	View or update data to be included in the Matricula book.
Address Data	EMPL_MTRBKADDR_ITA	Workforce Administration, Job Information, Employment Categorization ITA, Matricula Book, Address Data	View or update Matricula book address data.
ITA Matricula Book Calc	RUNCTL_MATRBK_ITA	Workforce Administration, Job Information, Employment Categorization ITA, Matricula Calculation, ITA Matricula Book Calc	Run the Matricula Book Calc process to update the Matricula table.

Running the Matricula Book Calculation Process

Access the ITA Matricula Book Calc page.

Copyright © 1988-2006, Oracle. All rights reserved.



ITA Matricula Book Calc page

Employee Classification Select the employee classification for this book.

Allow Retro Calculation Select to enable retroactive calculations to capture previously lost or missed matricula data.

Last Matricula: Update Select if you want the process to check for new matricula data only.

(ITA) Recording End of Employment Information for Italian Workers

This section discusses how to record employee resignation dates and normal notice periods.

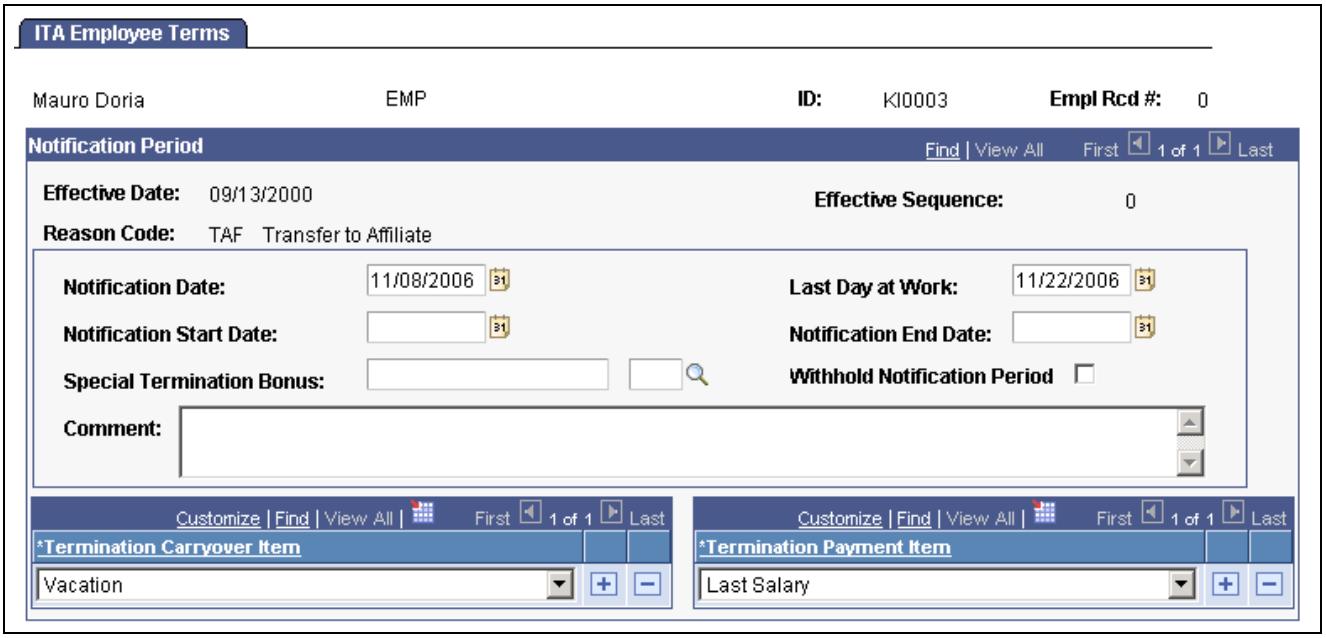
Page Used to Record End of Employment Information for Italian Workers

Page Name	Object Name	Navigation	Usage
ITA Employee Terms	EMPL_TERMS_ITA	Workforce Administration, Job Information, Employee Categorization ITA, Terms, ITA Employee Terms	Record the date on which an employee resigns from your company, and the normal notice period as required by the employee's contract.

Copyright © 1988-2006, Oracle. All rights reserved.

Recording Employee Resignation Dates and Normal Notice Periods

Access the ITA Employee Terms page.



ITA Employee Terms page

Notification Date Enter the date on which the employee gave notice of intent to end the contract.

Last Day at Work Enter the last day the employee will be at work.

Notification Start Date and **Notification End Date** Enter the start and end dates of the notification *(preavviso)* period, that is, the period for which the employer still pays contributions after termination. If the employment is terminated by the payee and notification is to be withheld, this is the period for which the amount should be withheld.

Special Termination Bonus Enter any bonus incentive owed to the employee.

Withhold Notification Period Indicates whether the employee's salary is to be withheld during the period between the notification start and end dates. This is an information-only field.

Termination Carryover Item Enter items that the employee can carry over for a termination. For example, during terminations such as a term for transfer to an affiliate, the employee and the employer can decide to "freeze" some items that can be transferred to the same employee for the new hiring process in the new affiliate company.

Termination Payment Item Enter items that should be paid after termination.

(ITA) Running the Equal Opportunities Report

This section discusses how to run the Equal Opportunities report.

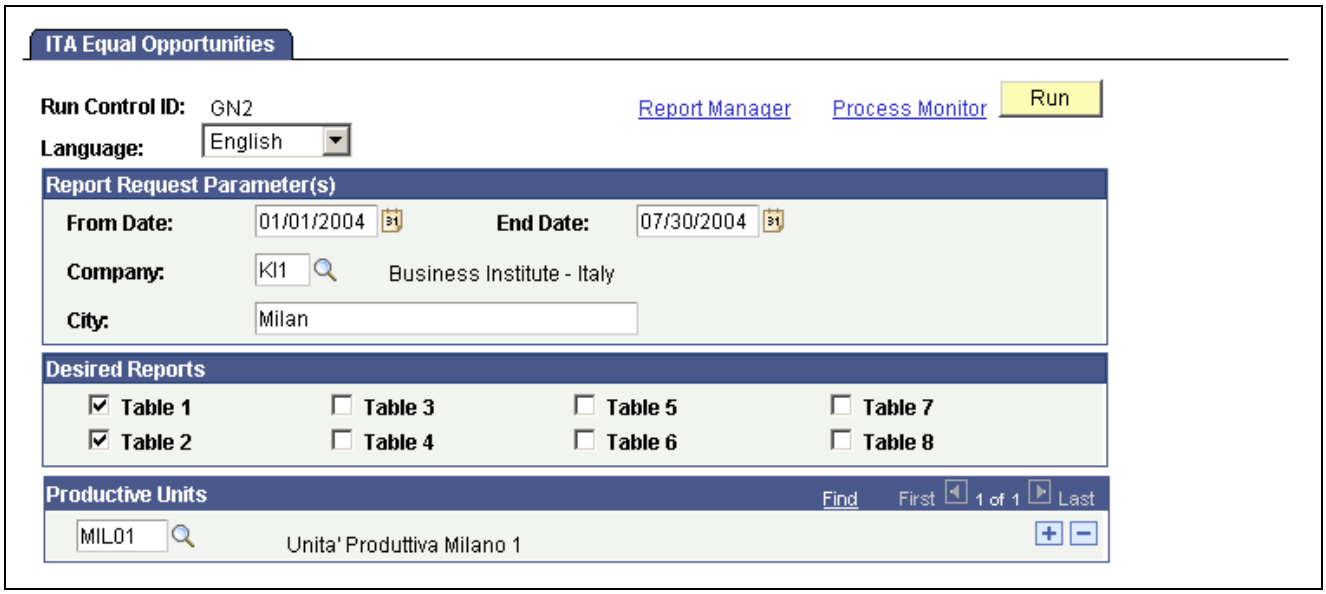
Copyright © 1988-2006, Oracle. All rights reserved.

Page Used to Run the Equal Opportunities Report

Page Name	Object Name	Navigation	Usage
ITA Equal Opportunities	RUNCTL_PER053	Workforce Administration, Labor Administration, Reports, Equal Opportunities ITA, ITA Equal Opportunities	Run the ITA Equal Opportunities report (PER053). This report is submitted every two years and consists of eight different tables. All companies with 100 or more employees are required to submit this report.

Running the Equal Opportunities Report

Access the ITA Equal Opportunities page.



ITA Equal Opportunities page

Desired Reports

Select the Equal Opportunities report tables that you want to populate.

Table 1 *(Informazioni Generali Sull'azienda)*

This table contains:

- Company and location information.
- Total number of employees as of December 31st of the second year of the reported period.
- Economic activity, including IVA organization codes.
- All CCNL information that applies.

Table 2 *(Informazioni generali sulle unitá nell'ambito comunale)*

This table contains:

- Location address.
- Total number of employees at that location as of the reporting date.

Copyright © 1988-2006, Oracle. All rights reserved.

- Number of employees as of December 31st of the second year of the reported period.

Table 3 *(Entrate e uscite nel biennio)*

This table contains:

- Number of employees as of December 31st of the first year of the reported period.
- The number of hires as of December 31st of the first year of the reported period.
- The number of terminations as of December 31st of the first year of the reported period.
- Number of employees as of December 31st of the second year of the reported period.

Table 4 *(Occupati al 31.12 del secondo anno del biennio e promozioni e assunzioni nell'anno)*

Lists the number of employees in each of the following categories: *dirigenti, quadri, impiegati,* and *operai.* Within each category, the report lists the number of employees per category level.

Table 5 *(Occupati al 31.12 del secondo anno del biennio per tipo contratto. CIG e aspettativa)*

Lists, per contract type, the number of employees in each of the following categories: *dirigenti, quadri, impiegati,* and *operai.*

Table 6 *(Elenco delle entrate, uscite e trasformazioni contratto (secondo anno del biennio))*

This table contains the following information listed by category *(dirigenti, quadri, impiegati,* and *operai):*

- Hires, including employees transferred from another location of the company, employees changed from another category, and new hires.
- Terminations, including employees transferred to another location of the company or transferred to another category, and termination of the labor relation (pension, resignation, contract expiration, individual or collective dismissal, death, and disability).
- Contract changes, including from *Determine Period* to *Undetermined,* from part-time to full-time, and vice versa.

Table 7 *(Formazione del personale svolta nel corso del secondo anno del biennio)*

This table contains the following information listed by category *(dirigenti, quadri, impiegati,* and *operai):*

- Number of training participants.
- Total hours of training participation per category.

Table 8 *(Retribuzione annua (secondo anno del biennio) per livello e categoria professionale)*

This table contains the annual gross salary amount subdivided by category *(dirigenti, quadri, impiegati,* and *operai)* and contractual level.

Productive Units

Select the productive units of the employees on whom you're reporting.

Copyright © 1988-2006, Oracle. All rights reserved.

(USA) Managing I-9 Information

This section provides an overview of managing I-9 information and discusses how to:

- Complete and submit Section 1 of the I-9 form. (This section is completed by the employee.)
- Complete the Preparer/Translator Certification. (Applicable only in specific situations.)
- Complete Sections 2 and 3 of the I-9 form. (These sections are completed by the employer.)
- Update or request a new I-9 form.
- Print I-9 forms.
- Run the I-9 Receipt/Expiration report.
- Archive I-9 data.

Understanding I-9 Information Management

The Immigration and Nationality Act requires United States employers to complete and store I-9 forms. The law was modified in 2005 to allow employers to manage I-9 forms electronically. Employers may continue to process paper I-9 forms and store them in electronically or complete and retain the I-9 forms solely in electronic format.

PeopleSoft Enterprise Human Resources enables you to collect, store, and manage all I-9 information in compliance with the Immigration and Nationality Act. This includes employee self service functions to complete and submit the employee I-9 information, and functionality for the employer to complete the required employer sections of the I-9 form. The application provides components to report and process I-9 information, including notification of expiration dates, storing, printing, and archiving.

 Copyright © 1988-2006, Oracle. All rights reserved.

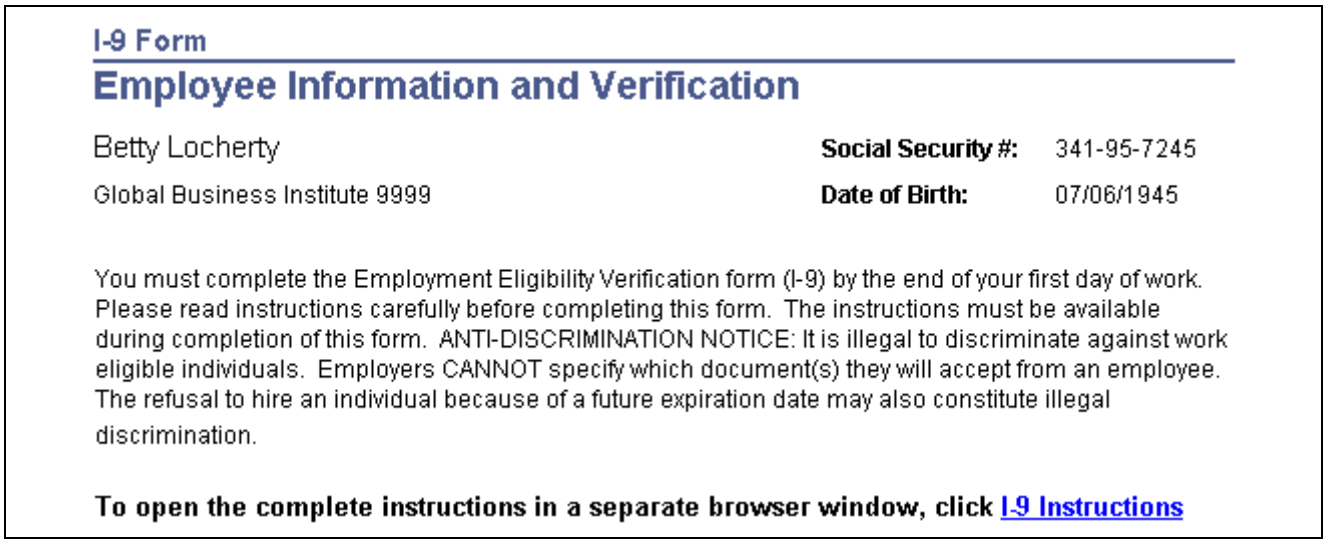
Pages Used to Manage I-9 Information

Page Name	Object Name	Navigation	Usage
I-9 Form - Employee Information and Verification	HR_I9_EE	Self Service, Personal Information, Complete and Submit I-9 Form, I-9 Form	Enter employee information for the I-9 form.
I-9 Form - Preparer Notification	HR_I9_PREP_NOTE	Self Service, Personal Information, Complete and Submit I-9 Form. This message appears if you select one or more check boxes on the I-9 Form page and click the Accept button.	Notify employee that the Preparer/Translator Certification page must be completed.
I-9 Form - Perparer/Translator Certification	HR_I9_PREPARER	Self Service, Personal Information, Complete and Submit I-9 Form. This page appears after you click the OK button on the Preparer Notification page.	This page is completed by the person who assisted the employee in the completion of the I-9 Form page. This page is displayed only if you selected one or more check boxes in the employee section of the I-9 Form page.
I-9 Form - Submit Confirmation	EO_SUBMIT_CONFIRM	This page appears after the employee and preparer or translator successfully complete required information and submit the self service I-9 form.	Notification that you have successfully submitted the employee portion of the I-9 form.
I-9 Form - Employer Review and Verification	HR_I9_ADMIN_SEC2	Workforce Administration, Personal Information, I-9 Forms, Complete/Reverify EE I-9 Form, I-9 Form	Complete sections 2 and 3 of the I-9 form. These sections are completed by the employer.
I-9 Form - Updating and Reverification	HR_I9_ADMIN_SEC3	Workforce Administration, Personal Information, I-9 Forms, Complete/Reverify EE I-9 Form, I-9 Form	Update a completed I-9 form or request that the employee submit a new form.
Print I-9 Forms	HR_RUNCTL_I9_FORM	Workforce Administration , Personal Information, I-9 Forms, Print I-9 Forms, Print I-9 Forms	Generate the I-9 forms in PDF format.
I-9 Receipt/Expiration Report	HR_RUNCTL_I9_VERFY	Workforce Administration, Personal Information, I-9 Forms, I-9 Receipt/Expiration Report, I-9 Receipt/Expiration Report	Identify I-9 forms that require re-verification and notify administrators.

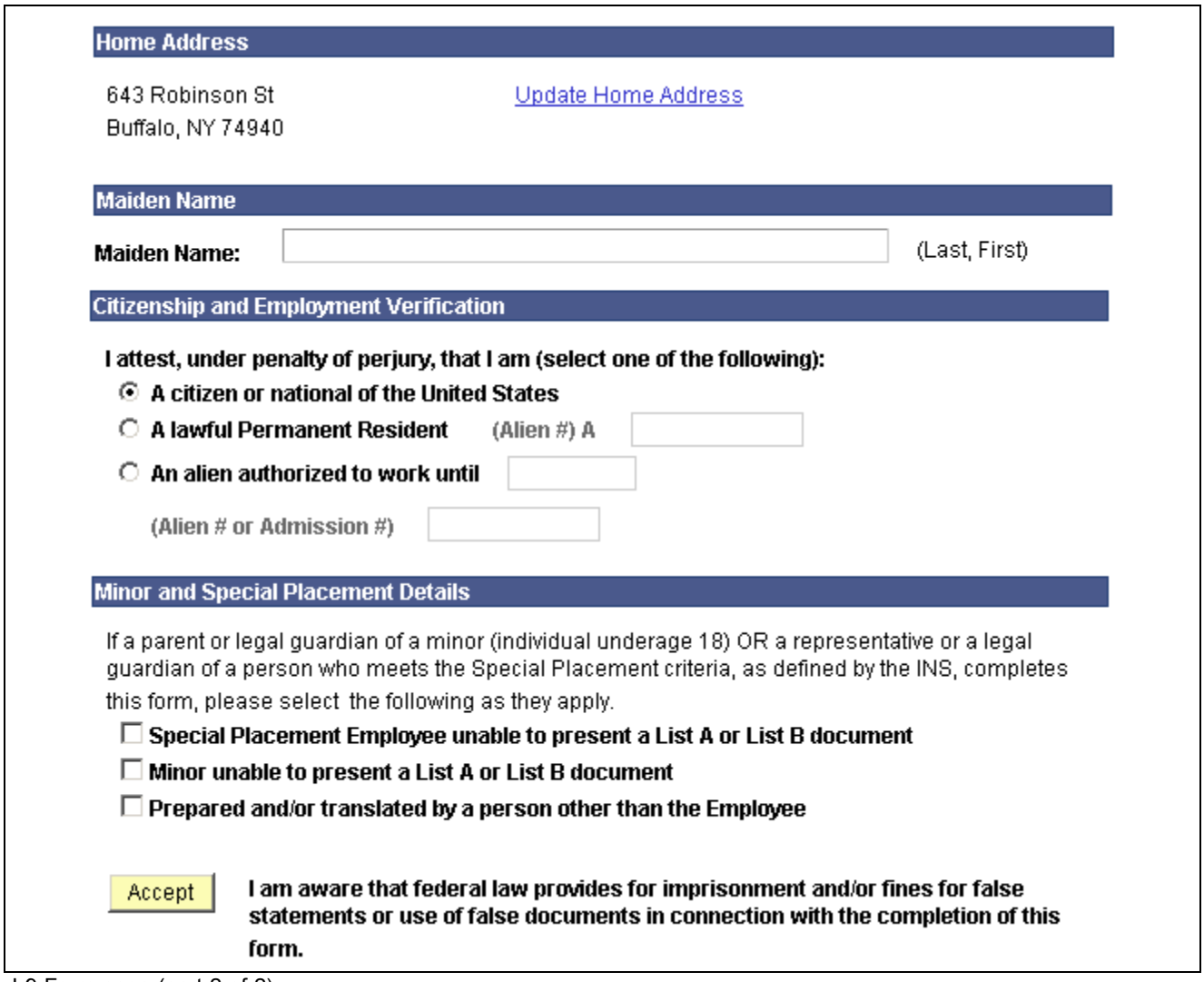
Completing and Submittting Section 1 of the I-9 Form

Access the I-9 Form - Employee Information and Verification page.

Copyright © 1988-2006, Oracle. All rights reserved.



I-9 Form page (part 1 of 2)



I-9 Form page (part 2 of 2)

Copyright © 1988-2006, Oracle. All rights reserved.

Employees use this page to complete and submit Section 1 of their I-9 forms. Employees can complete and submit more than one I-9 form. Employees cannot modify I-9 forms after submission and can view only the most recent submission.

I-9 Instructions Click this link to open a new browser window with the I-9 form in PDF format that has instructions for completing the form.

Home Address This information is loaded from the employee's address record.

Update Home Address If the address information is not current, click this link to open the Home and Mailing Address page in employee self service. Edit address information and return to the employee I–9 form.

Maiden Name This is an optional field that stores maiden name, if applicable. The field is automatically populated by the employee's name record, if available.

Citizen and Employment Verification

Select the option for your eligibility type. You must select one of these options.

Alien # Enter your lawful Permanent Resident alien number. This field is mandatory if you select the Permanent Resident eligibility type.

Alien Authorization Date Enter the date until which you are authorized to work. This field is mandatory if you select the Alien eligibility type.

Alien # or Admission # Enter your assigned number. This field is mandatory if you select the Alien eligibility type.

Minor and Special Placement Details

Select the appropriate check boxes. You can select more than one check box, if applicable. If you select any check box in this section, the preparer or translator must complete the Preparer/Translator page before submitting the form.

Submitting the Form

Accept Click this button to save and submit this form, trigger appropriate workflow notifications to the administrator, and generate the confirmation page.

Completing the Preparer/Translator Certification

This page is displayed after you click the Accept button on the Employee Information and Verification page.

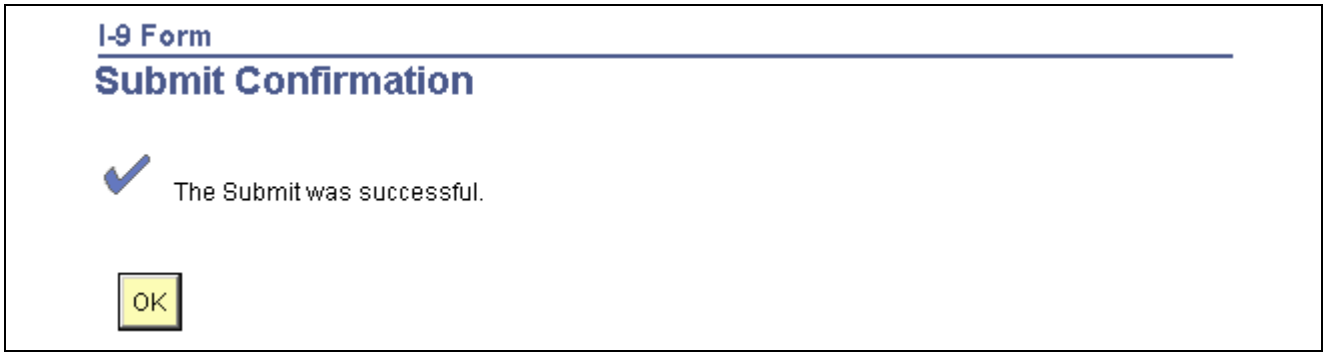
Copyright © 1988-2006, Oracle. All rights reserved.



I-9 Form - Preparer/Translator Certification page

Preparer's Name Enter the preparer's name in this field. This field is required.

Preparer's Address, City, Stateand Zip Enter the preparer's address in these fields. These fields are required.



I-9 Form - Submit Confirmation page

This message appears after you successfully complete and submit all required information.

Completing Sections 2 and 3 of the I-9 Form

After the employee has completed and submitted the I-9 form, the employer completes the remaining sections.

Access the I-9 Form - Employer Review and Verification page.

Copyright © 1988-2006, Oracle. All rights reserved.


I-9 Form

Employer Review and Verification

Betty Locherty
643 Robinson St
Buffalo, NY 74940

Social Security #: 341-95-7245
Date of Birth: 07/06/1945
Maiden Name:
Employee Sign Date: 06/22/2006

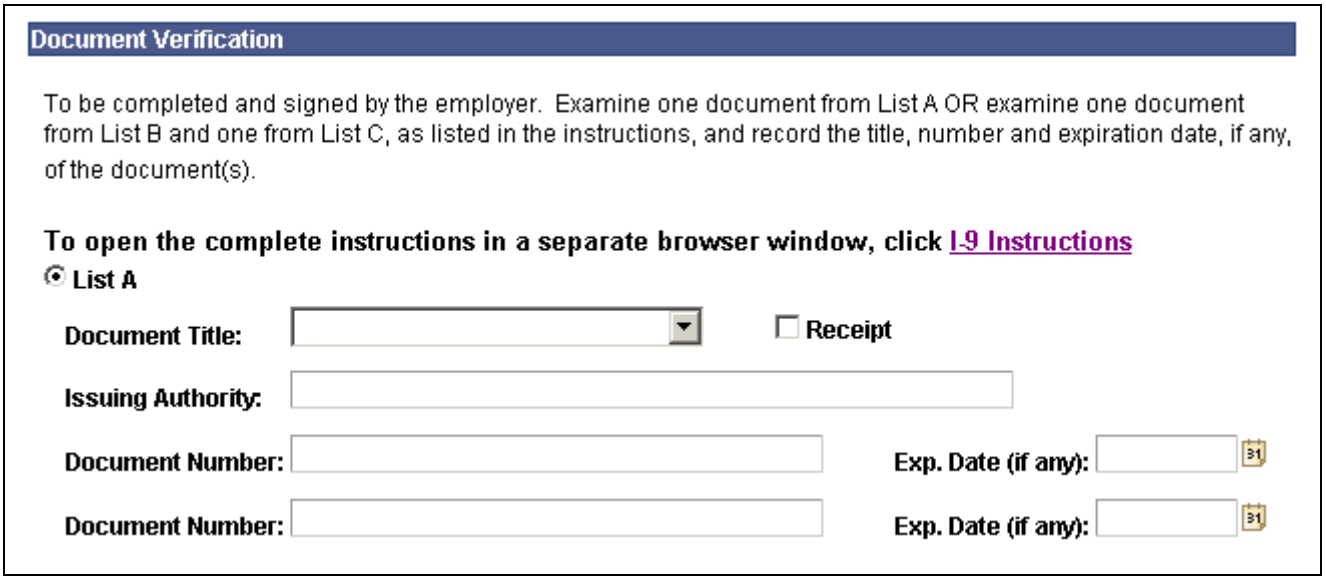
Citizenship and Employment Verification

A citizen or national of the United States
A lawful Permanent Resident (Alien #) A
An alien authorized to work until
(Alien # or Admission #)

Minor and Special Placement Details

Special Placement Employee unable to present a List A or List B document
Minor unable to present a List A or List B document
Prepared and/or translated by a person other than the Employee

I-9 Form – Employer Review and Verification page 1 of 4


Document Verification

To be completed and signed by the employer. Examine one document from List A OR examine one document from List B and one from List C, as listed in the instructions, and record the title, number and expiration date, if any, of the document(s).

To open the complete instructions in a separate browser window, click I-9 Instructions

List A

Document Title: Receipt

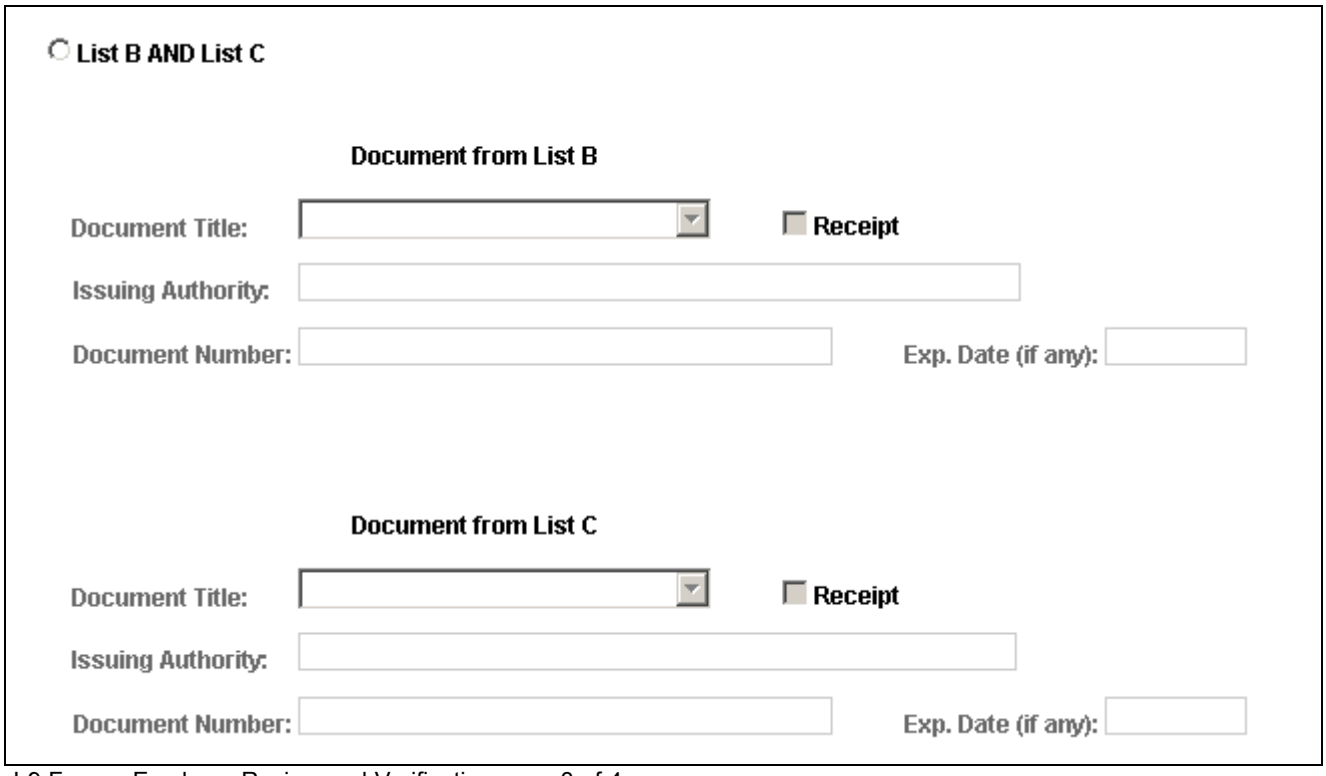
Issuing Authority:

Document Number: Exp. Date (if any):

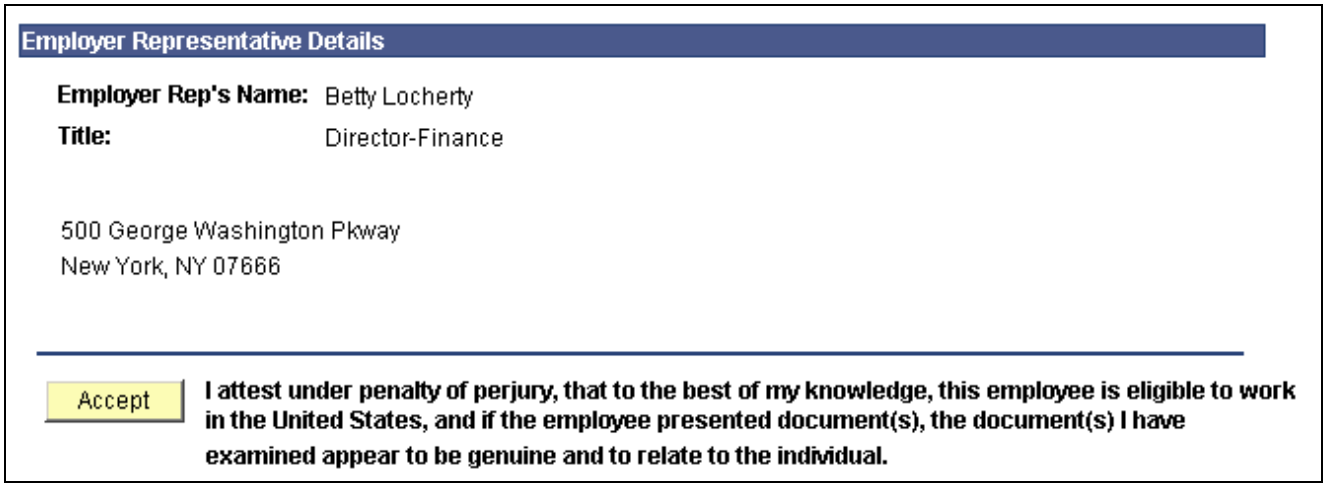
Document Number: Exp. Date (if any):

I-9 Form – Employer Review and Verification page 2 of 4

Copyright © 1988-2006, Oracle. All rights reserved.



I-9 Form – Employer Review and Verification page 3 of 4



I-9 Form – Employer Review and Verification page 4 of 4

This page is automatically configured depending on employee entries on the form:

- If the employee selected the Special Placement option, then the List B AND List C option is selected by default and the text *Special Placement* appears in the Document Number field.
- If the employee selected the Minor check box, then the List B AND List C option is selected by default and the text *Individual under age 18* appears in the Document Number field.
- If the employee selected both the Special Placement and the Minor check boxes, then the List B AND List C option is selected by default and both the *Special Placement* and *Individual under age 18* text entries appear in the Document Number field.

I-9 Instructions Click this link to open a new browser window that contains the I-9 form with instructions in PDF format.

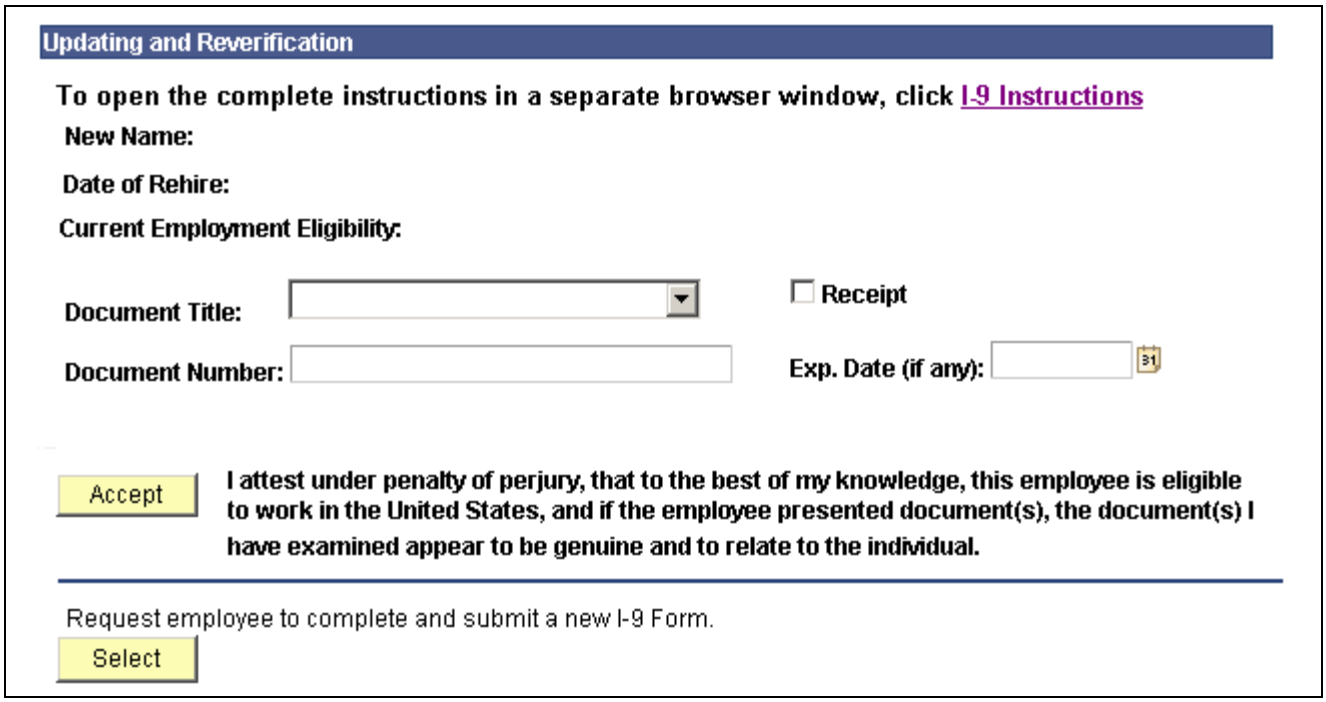
Copyright © 1988-2006, Oracle. All rights reserved.

List Type	Select the option that corresponds to the type of citizenship document provided by the employee. You must select either List A or List B AND List C and enter the information. If List A is chosen, at least one of the two document number fields is required. These options are mutually exclusive; after you select one, the fields associated with the other are grayed out.
Document Titles	Record the type of documentation provided by the employee. There are separate fields for each document type (A, B and C).
Issuing Authority	Enter the name of the agency that issued the document.
Receipt	Select this check box to to indicate that the employee has applied for the document. The default setting is cleared, which hides the Receipt Document Number field and corresponding Expiration Date field. When the Receipt check box is selected, the Receipt Document Number and Expiration Date fields are visible. After you save this page you cannot clear this check box.
Receipt Document Number	Enter the receipt number of the documentation application. The Receipt Document Number may be different from the actual Document Number.
Document Number	Enter the number of the actual document.
Exp. Date (if any)	Optional fields to record the expiration date, if any, of the actual documents entered.
Employer Representative's Name	This field is populated with the name of the administrator who is submitting the data.
Title	This field is populated with the job title of the administrator who is submitting the data.
Company Address	These fields are populated with the current company address.
Accept	Click this button to save the information you entered.

Updating or Requesting a New I-9 Form

Access the I-9 Form - Updating and Reverification page.

Copyright © 1988-2006, Oracle. All rights reserved.



I-9 Form - Updating and Reverification page

HR Administrators use this page to view completed I-9 documentation and enter additional information, if applicable. If an employee is rehired within three years of termination, or if the original document has expired, employers may reverify or update the original I-9 after it is submitted. An I-9 form can only be updated or reverified one time (including receipt and actual documentation).

If new information needs to be entered and actual documentation information already exists, all fields will be display only and the employee and employer must complete a new I-9 form. The administrator can send an email notification to the employee requesting a new I-9 form from this page. The administrator is able to view all forms completed by employees, including history.

The employer is not allowed to make any changes to the form after it is saved unless the Receipt check box is selected. In this case, you can enter the actual information for the specific document that was flagged as Receipt, but only the Document Number and Expiration Date fields. The entry in the Document Title field cannot be changed. After the additional field entries are completed and the form is saved, the Receipt check box and Receipt Document Number field are grayed out and cannot be edited.

I-9 Instructions Click this link to open an I-9 form in PDF format that includes instructions for completion.

New Name This field is automatically populated by the employee's current name if it is different from the name initially saved on the form.

Date of Rehire The most current rehire date appears by default in this field if it exists.

Document Title Enter the type of documentation being reverified or updated.

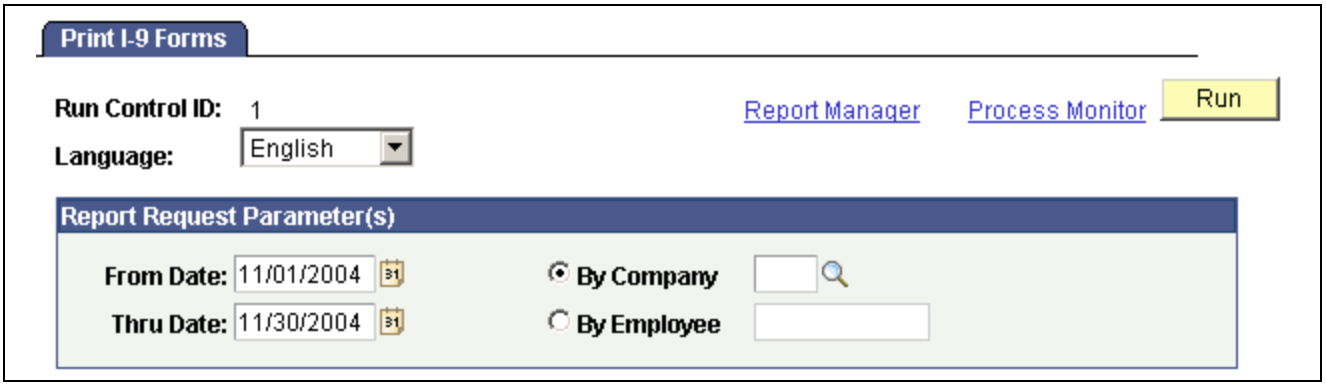
Receipt Select this check box to to indicate that the employee has applied for the reverified or updated document. The default setting is cleared, which hides the Receipt Document Number field and corresponding Expiration Date field. When the Receipt check box is selected, the Receipt Document Number and Expiration Date fields are visible. After you save this page you cannot clear this check box.

Copyright © 1988-2006, Oracle. All rights reserved.

Receipt Document Number	Enter the receipt number for the document application receipt.
Document Number	Enter the actual document number.
Exp. Date (if any)	Use this optional field to record the expiration date, if any, of the document entered.
Accept	Click this button to save the form.
Select	Click this button to send an email notification to the employee requesting a new I-9 form.

Printing I-9 Forms

Access the Print I-9 Forms page.

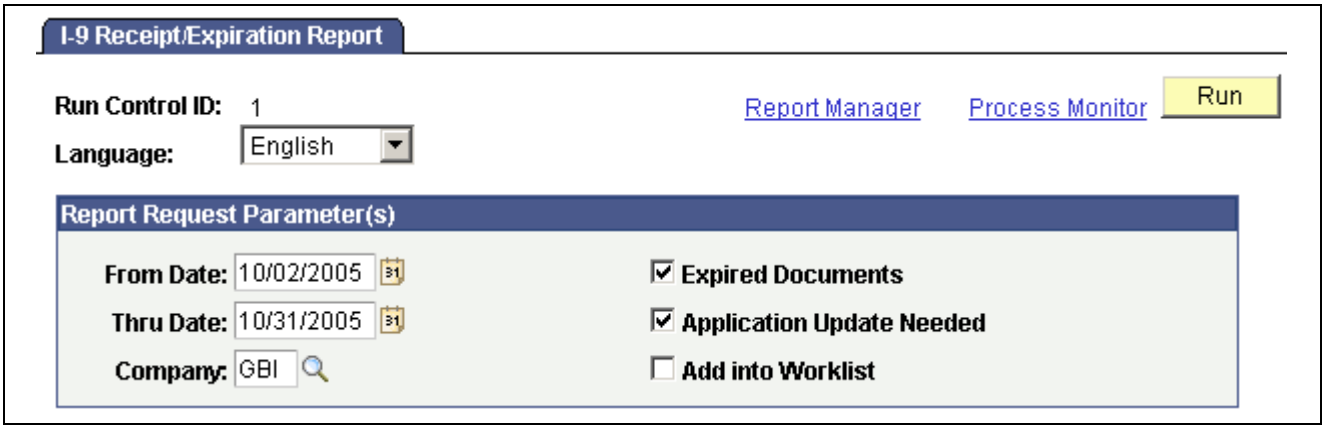


Print I-9 Forms page

From Date and Thru Date	Use these fields to determine effective dates to extract when running the report. Both fields are required.
By Company and By Employee	Run the report using one of these options. Use the lookup to enter a company code or an employee ID.

Running the I-9 Receipt/Expiration Report

Access the I-9 Receipt/Expiration Report page.



I-9 Receipt/Expiration Report

Copyright © 1988-2006, Oracle. All rights reserved.

From Date and Thru Date Use these fields to define the effective dates for the report. Both fields are required.

Company This is an optional field. Entering a value will limit the report output to employees for a specific company as of the date that the employee submitted the I-9 form.

Expired Documents Select this check box to have the report list I-9 forms with expiration dates within the specified date range.

Application Update Needed If selected, the process will find all documents that have a Receipt check box selected and that do not have corresponding actual data saved. The process compares the I-9 submission date with the date range and includes all employees whose I-9 date plus 90 days is within the date range.

Note. You must select either the Expired Documents or the Application Update Needed check box to run the report.

Add into Worklist Select this check box to have the administrator receive a worklist entry for each employee form listed in the report.

Archiving I-9 Data

See *Enterprise PeopleTools PeopleBook: Data Management, "Using PeopleSoft Data Archive Manager."*

(USA) Determining U.S. Residency Status for Foreign Nationals

This section discusses how to run the Substantial Presence test.

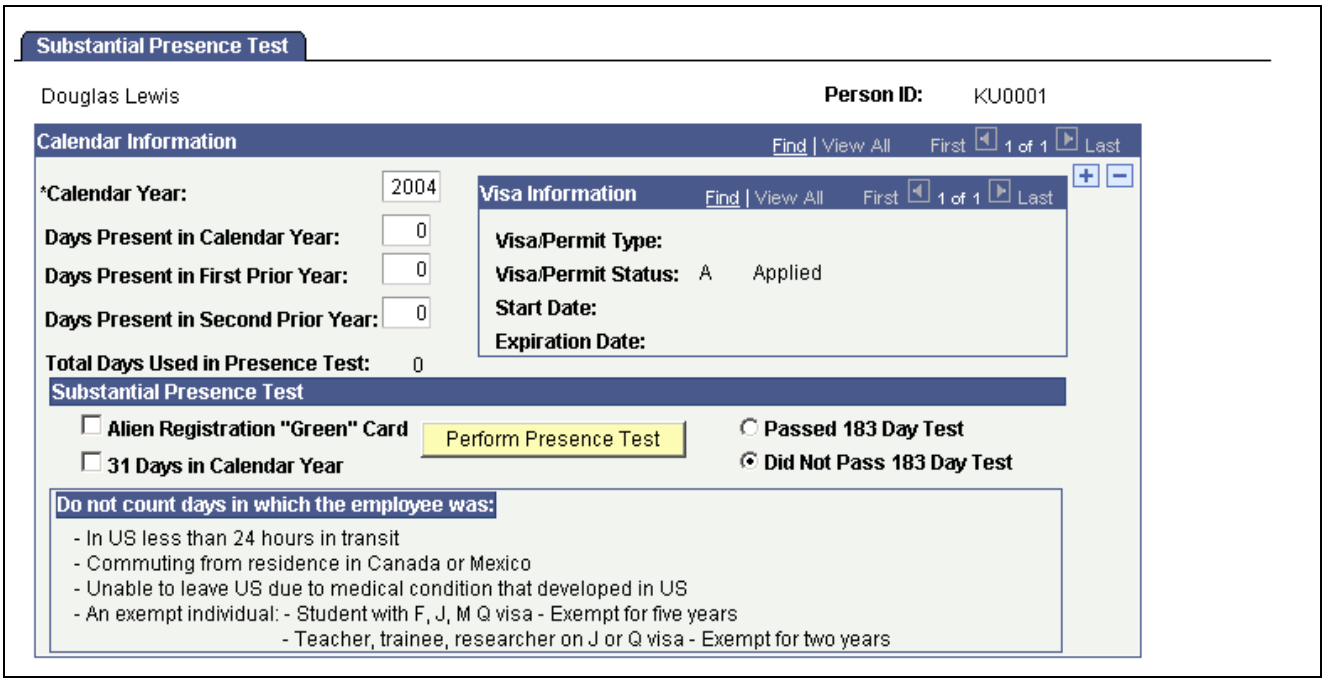
Page Used to Determine U.S. Residency Status for Foreign Nationals

Page Name	Object Name	Navigation	Usage
Substantial Presence Test	PRESENCE_TEST	Workforce Administration, Personal Information, Citizenship, Employee Presence Test USA, Substantial Presence Test	Run the Substantial Presence test to determine if alien employees are considered U.S. residents for tax purposes for a particular calendar year.

Running the Substantial Presence Test

Access the Substantial Presence Test page.

Copyright © 1988-2006, Oracle. All rights reserved.



Substantial Presence Test page

Under this test, a foreign national is considered a resident for tax purposes if the person is present in the U.S. at least 31 days in the current year and 183 days during the current year and the two preceding years, as determined under a weighted formula.

Nonresident aliens may make a special election to be treated as residents for the first year in which they are present in the U.S. This election is subject to several restrictions, one of which is that the nonresident alien must satisfy the Substantial Presence test in the year following the election.

Rules that govern which days don't count towards an employee's Substantial Presence test appear in the Do not count days in which the employee was group box. This test is only valid for current or previous years.

Visa Information

If the employee has a visa or permit, this group box provides information about the visa or permit.

Calendar Information

Calendar Year — Enter the appropriate calendar year.

Days Present in Calendar Year, Days Present in First Prior Year, and **Days Present in Second Prior Year** — Enter the number of days present in the current year, the previous year, and the year previous to that.

The actual days present in the first prior year equal 1/3 of 365 minus the value in the Days Present in First Prior Year field. The actual days present in the second prior year equal 1/6 of 365 minus the value in the Days Present in Second Prior Year field.

For example, enter the number of days present in 1998, followed by the number of days present in 1997, followed by the number of days present in 1996.

The Total Days Used in Presence Test field automatically displays the total number of days after all of the previous fields are completed.

Copyright © 1988-2006, Oracle. All rights reserved.

Note. If you are entering Substantial Presence test information for multiple years, the First Prior Year and Second Prior Year fields are based on the prior year information.

Substantial Presence Test

Alien Registration "Green" Card Select if the employee has been issued an alien registration card, or green card. If you select this check box, the Substantial Presence test isn't necessary; the employee is considered a U.S. resident for tax purposes.

31 Days in Calendar Year This check box is automatically selected if the employee has been present 31 days in a calendar year.

Perform Presence Test Click to see if the employee passed the Substantial Presence test. The system calculates the total number of days present and selects either the Passed 183 Day Test or Did Not Pass 183 Day Test option.

In the 183 Day Test calculation, the system uses 100 percent of the days present in the calendar year.

Copyright © 1988-2006, Oracle. All rights reserved.

CHAPTER 11

(ESP) Managing Spanish Reporting

This chapter discusses how to:

- Set up XML files.
- Manage Contrata communications.
- Manage Delta communications.
- Confirm the sending of XML files.
- Manage Contract Printing.
- Generate Affiliation to Social Security (AFI) flat files.

Setting Up XML Files

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

- Set up XML code tables.
- Define XML sets.
- Set up XML node tables.
- Set up node mapping.
- Define XML templates.
- Map contracts to XML nodes.

Understanding XML File Setup

This overview discusses the XML file setup necessary to generate XML files. The system uses the XML file setup for Delta (Sistema Delt@) reporting, Contrata (Sistema Contrat@) reporting, and contract printing.

General XML Setup Steps

Before you can generate XML files for reporting, you must set up the components for XML file creation.

To set up XML files:

1. Set up XML code tables.
2. Define XML sets.
3. Set up XML node tables and node mapping.
4. Define XML templates.

Copyright © 1988-2006, Oracle. All rights reserved.

5. Map contracts to XML nodes (Contrata reporting only).
6. Map contract-level nodes to the appropriate contract type (Contract Printing only).
7. Perform the steps to generate the XML file.

The XML generation process uses this dynamic setup data to create the XML files based on the specific needs of the report you are generating.

XML Code Tables

XML code tables are tables that list the valid values of an XML node. Code tables enable you to compile setup data through a single menu entry point. Use the XML Code Table (XML_CODE_TBL) component to define the auxiliary XML code tables and the valid values that your company uses. Once you define the XML code tables, you can use them to:

- Map system values to XML code table values for a node.
- Serve as validation tables for the values of a node.

You can perform both of these options when defining XML nodes through the XML Node Table component. Later in the business process, when you are completing a person's node data for an XML file during XML file generation, the system prompts you to select from the valid values that you have defined in the code table for the node.

XML Sets

An XML set is a group XML files. You can associate XML sets with functional areas. Human Resources for Spain delivers an XML set for the Contrata, Delta, and Contract Printing functional areas. Use the XML Set Table component to define XML set definitions for XML files. You associate XML sets with XML nodes and XML templates. Assign XML sets to XML nodes through the XML Node Table component and to XML templates through the XML Template Table component.

XML Node Tables

XML nodes are the core of the XML file setup. XML nodes are sets of tags within an XML file that determine the hierarchical structure of the file. They represent the XML tags that are mapped to Human Resources data. All tags between the open tag and closed tag of a node comprise the node. Use the XML Node Table component to define XML nodes and create the relationships between the nodes. The nodes that you create and relate to each other define the XML file structure. Through the XML generation process the system can retrieve data that is already stored in the Human Resources database and write the data into the appropriate XML nodes.

You can define complex nodes or simple nodes. Complex nodes are composed of other simple or complex nodes. Complex nodes can be root nodes or children nodes. There can only be one root node per XML template that you define. A root node defines a specific XML file layout. For further embedding of XML tags, children nodes can also contain their own children nodes. Simple nodes are associated with values. To derive the values of simple nodes, you can use as source data manual values that you enter or system values.

Sometimes the data with the system as the source from which you are deriving the values of the nodes does not match the data that you need for the XML file. In cases such as these, you can also use the XML Node Table component to map the system data values to alternate values that fit your reporting needs. For example, PeopleSoft system data uses as gender values M (male) and F (female). However, I.N.E.M. uses H (hombre/male) and M (mujer/female). You can use the XML Node Table component to map these PeopleSoft system values to the corresponding I.N.E.M. values.

 Copyright © 1988-2006, Oracle. All rights reserved.

XML Templates

XML templates define the type of communications within each functional area, identifying the complete XML structure of the XML file that you generate for each communication. An XML template holds the keys and root node for runtime data retrieval for the XML generation process. When defining each template, you assign a root node. The root node thus contains the whole information for all of the nodes in the template thereby defining the XML file structure. At runtime the system uses these keys to retrieve the correct values for the fields as part of the SQL Select statement when retrieving the data for the children nodes of the root node that you associate with the XML template in its definition.

Contract Mapping

Contract mapping is the means of associating a contract type with XML templates and XML nodes. Within the Contrat@ Mapping component, you select the Contrata template ID for which you want to perform mapping and then link selected contract types to specific XML starting nodes. Through this action you are thus assigning a specific XML format to each contract type. You must assign a specific XML node to each contract type because each contract type could report different information. Delta XML file generation does not use contracts and therefore does not require mapping.

Contract Printing Mapping

Contract printing mapping is the means of associating a contract type with XML templates and XML nodes. Within the Contract Printing Mapping component, you select the Contrata template ID for which you want to perform mapping and then link selected contract types to specific XML starting nodes. Through this action you assign a specific format to each contract type. You must assign a specific XML node to each contract type because each contract type could report different information. Delta XML file generation does not use contracts and does not require mapping.

Note. Contract Printing generates reports in PDF format, not XML format. But the system takes advantage of the functionality of XML generation used in Contrat@ and Delt@ to provide a flexible way to set up and customize the content of the PDF files. So the system uses the XML setup tables to define the data that Contract printing functionality needs to extract

---

Copyright © 1988-2006, Oracle. All rights reserved.

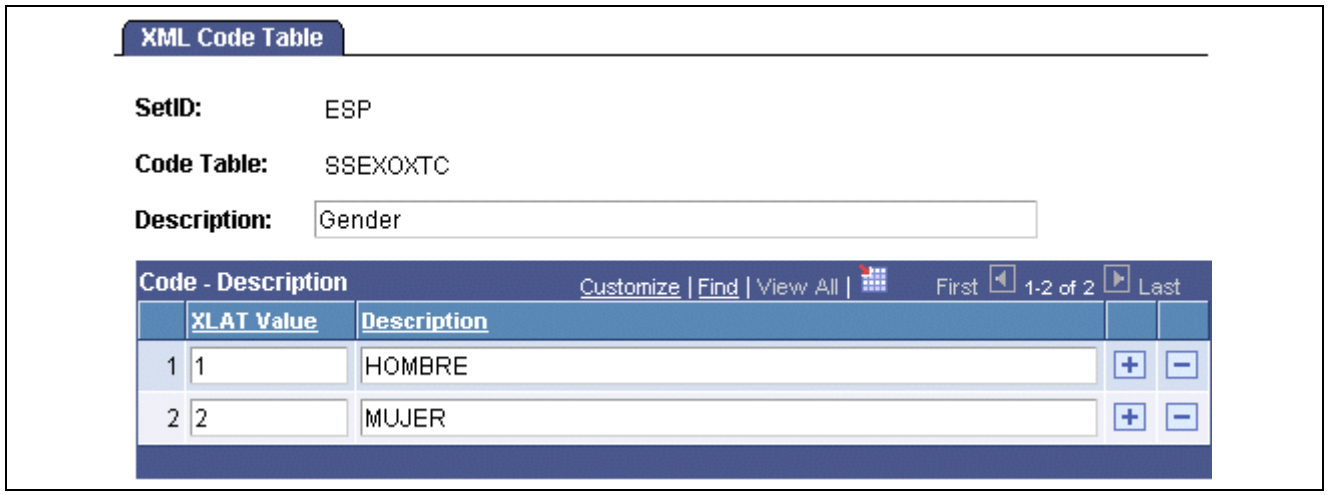
Pages Used to Set Up XML Files

Page Name	Object Name	Navigation	Usage
XML Code Table	XML_CODE_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, XML Code Tables	Define the auxiliary XML code tables and the valid values that your company uses for XML nodes.
XML Set Table	XML_SET_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, XML Set Table	Maintain XML set definitions.
XML Template	XML_TEMPLATE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, XML Template Table	Define templates for use during XML file generation.
Node Table	XML_NODE_TBL1	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, XML Node Table, Node Table	Define the nodes that comprise the XML file structure for Delta and Contrata reporting, or for contract printing of specific contract types.
Node Mapping	XML_NODE_TBL2	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, XML Node Table, Node Mapping	Map existing system values for nodes to alternate values that the XML file requires.
Contrat@ Mapping	CTTA_MAPPING_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Contrat@ Mapping	Define the root node that corresponds to each contract type for Contrata XML file generation.

Setting Up XML Code Tables

Access the XML Code Table page.

Copyright © 1988-2006, Oracle. All rights reserved.



XML Code Table page

Code Table The name of the code table.

Description Enter the description of the code table.

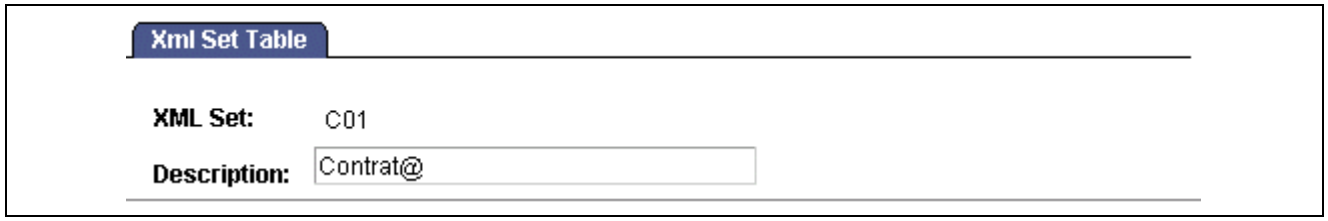
Code - Description

XLAT Value Enter the translate value for the code table.

Description Enter the description of the translate value.

Defining XML Sets

Access the XML Set Table page.



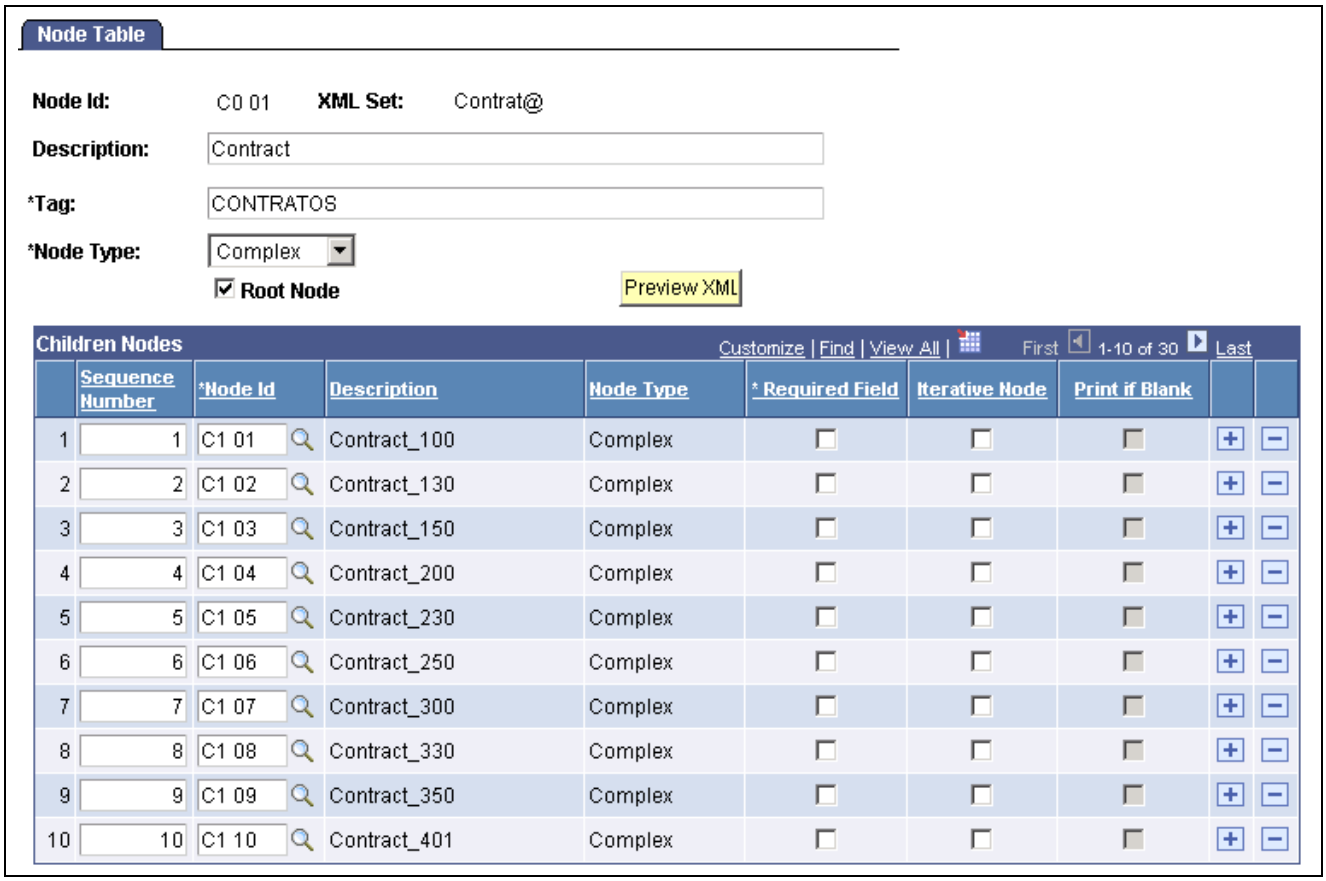
XML Set Table page

Human Resources for Spain provides XML sets for both Delta and Contrata reporting. Human Resources for Spain also delivers the XML set P01 for use with all contract printing.

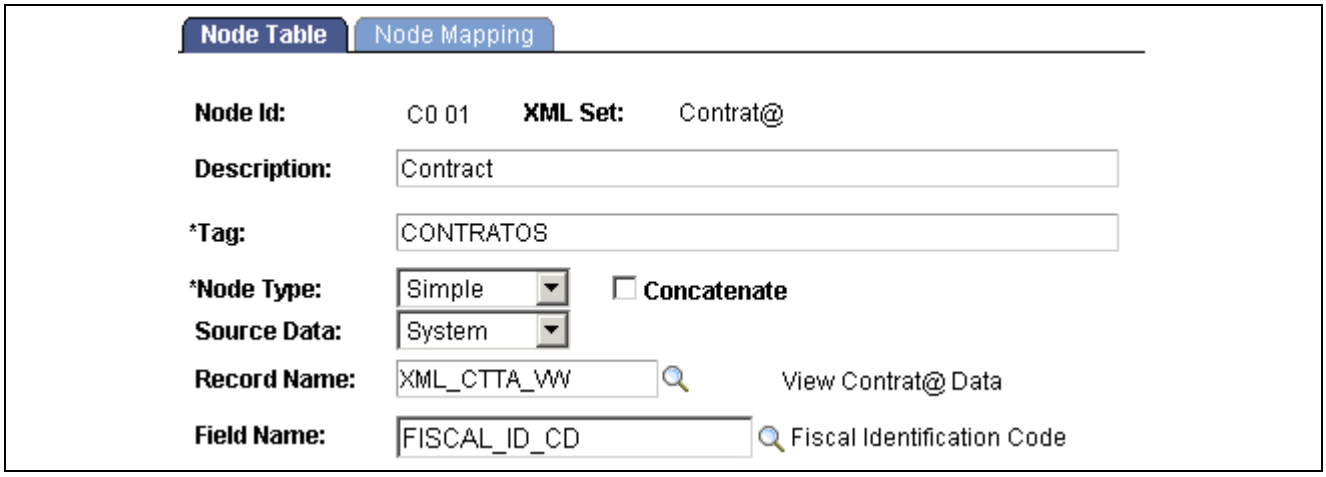
Setting Up XML Node Tables

Access the Node Table page.

Copyright © 1988-2006, Oracle. All rights reserved.



Node Table page (complex node type)



Node Table page (simple node type)

Node ID When creating a new node, enter a code to identify the node.

XML Set Select the XML set to specify the functional area for which you are defining this node.

Description Enter a description of the node.

Tag Enter the name of the XML tag for the node.

Copyright © 1988-2006, Oracle. All rights reserved.

Node Type Select whether the node is *Simple* or *Complex*. Simple nodes are associated with values, whereas complex nodes are composed of other simple or complex nodes.

Root Node Select this check box to indicate that this complex node is a root node, meaning that it is the node from which all other nodes in the XML file structure are derived.

Preview XML Click this button to access the XML Preview ESP page, where you can preview the XML file structure for the complex node. You can only preview XML files structure for complex node types.

Concatenate Select this check box if the data in this node is the concatenation of two or more fields in the database. The system displays the Node ID field for you to select the concatenated node. This check box becomes available for edit only for simple nodes.

Node ID Select the concatenated node. This field becomes available only if you select the Concatenate check box.

Source Data Select how you want to define the source data for the node. During XML file generation, the system uses the option that you select to retrieve and validate node values in the XML file. This field becomes available for edit only for simple nodes. Valid values are:

- *Manual:* Select this option for those nodes for which the data is not stored in the HR system, so the system will request its value to be entered manually when generating the file. Selecting this option enables you to validate a node value against the specific XML code table, translate field, or date format that you specify. Or you can specify that there be no validation, enabling the user to enter any node value into an open entry field.
- *System:* Select this option to indicate that the valid values for the node already exist in the application as part of a special view designed specifically for XML files. After selecting this option, you then need to specify which record (view) and field contains the valid values for the node. The Record Name field, Field Name field, and Node Mapping page become available for edit. You must select this option if you need to map a system value to an alternate value.

Record Name and **Field Name** The system displays these fields when you select system data as the as source data of a simple node. If you select the *System* value in the Source Data field, you then need to specify which record and field contain the valid values for the XML node. To specify a record and field, first select a record from the list of valid views. Then select a field from the list of available fields in the view. The system uses your selection to validate data when generating XML files.

When selecting a valid record and field, you cannot use any record. You must use special views built for this purpose. The delivered special views and any that you create must meet the following two conditions:

1. Name.Record name must start with XML_ and end with _VW.2.
2. Keys.Record keys must be defined using only the fields defined in the template.

Validation Type Manually select the type of data validation that you want to occur when the system validates the node values that users enter for a person in an XML

Copyright © 1988-2006, Oracle. All rights reserved.

file. This field becomes available only when the Source Data field value is manual. Valid values are:

- *Code Table:* Select this option if you want the node value to come from a table of values as defined on the XML Code Table page. The system displays the Code Table field for you to select the specific table.
- *Date:* Select this option if you want the node value to be a date. The system displays the Formatted field for you to select the date format.
- *None:* Select this option if you do not need validation of the node value. The system displays the Node Value field as an open entry field on the Details page of the XML file generation pages. Users can enter any value for the node because the field that has no edits for validation.
- *Xlat Field* (translate field): Select this option if you want node value to come from a translate table for a specific field. The system displays the Field Name field for you to select the field from which the system prompts users with translate values.

Default Value For a simple node where the source is manual you can set up a default value.

Reg Region (regulatory region) This field becomes available for edit only for simple node types that use code tables. Select the regulatory region to use to filter possible code tables to a specific setID. Code tables contain a setID. By selecting the regulatory region, the system enables you to select only the code tables with the same setID as the regulatory region.

Code Table If you select a validation type of code table, select the table from which you want the system to prompt users with values to select for a node.

Formatted If you select a validation type of date or a date field, select how you want the date field to be formatted.

Field Name If you select a validation type of translate field, select the field from which the system prompts users with translate values.

Children Nodes

Use this group box to define the children node members of a complex node. All children nodes that you define for a given node appear at the same level in an XML file structure. If children nodes are complex nodes that require their own children nodes, you must define members for these nodes in their own node definition.

Sequence Number Enter the sequence in which you want the children nodes to appear in the file structure within the parent node. The system arranges the children nodes in order from lowest to highest.

Node ID Select the child node. Define child nodes using this same component.

Description The system displays the description of the child node.

Node Type The system displays the node type of the child node, either simple or complex.

Required Field Select this check box to make this node a required field in the XML file. When you validate the XML file through the appropriate reporting component, the system requires that the user enter a value for this field before generating the XML file.

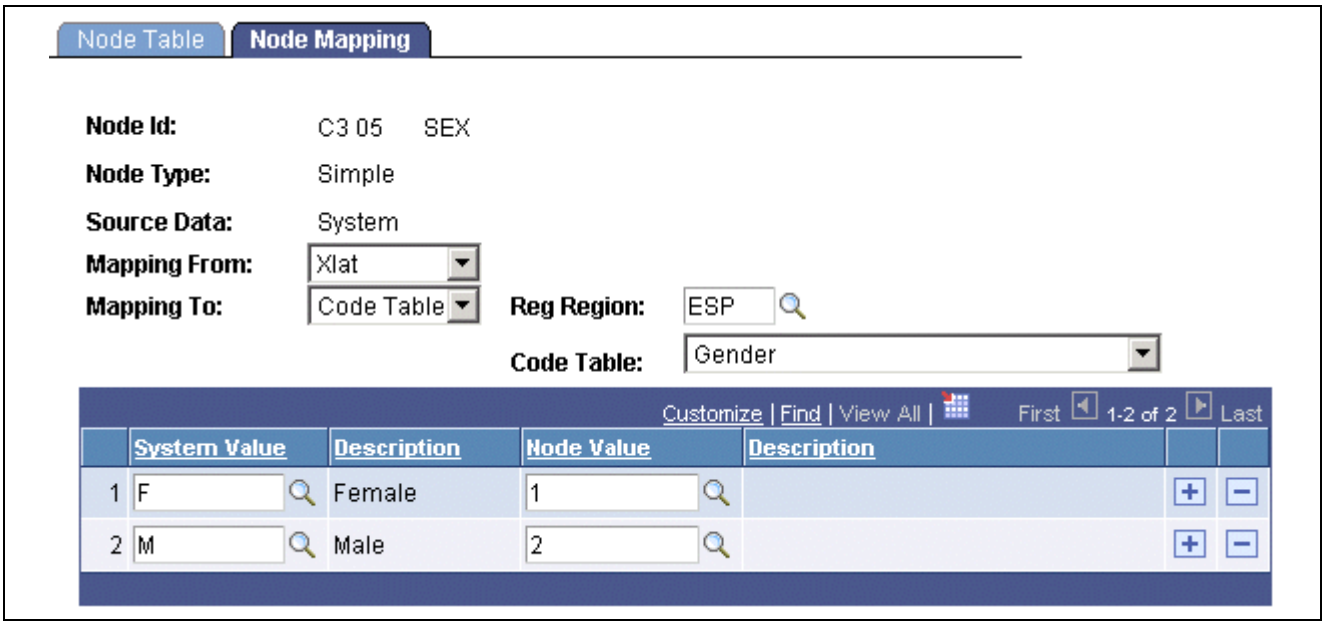
Copyright © 1988-2006, Oracle. All rights reserved.

Iterative Node Select this check box to indicate that you can repeat this node inside the XML file.

Print if Blank Select this check box if you want an XML file to contain a specific node even if the value is null.

Setting Up Node Mapping

Access the Node Mapping page.



Node Mapping page

Note. This page becomes available only when you define the Node Type as Simple and the Source Data as System on the Node Table page.

Use this page is cases where the values for the node exists in the application but the system values do not match the values that the XML file requires. Through this page you can map the existing system values to other, more appropriate values that you must use for the XML file.

Mapping From For the field that you are mapping from, select how the field derives its valid values. After you make a selection, use the System Value field in the grid below to specify the system field values from which you want to map to alternate values. Your choices are:

- *Manual:* Select this option if the system values are derived manually through user entry and you want to map these values to other values. Fields such as these are defined as having no edit, thus enabling manual entry. The System Values field in the grid prompts you to manually enter each system value that you want to map to another value.
- *None:* Select this option if there is no need to map system values for the field that you specify in the Field Name field on the Node Table page to another value.
- *Record:* Select this option if the system values are derived from a prompt table and you want to map values in the prompt table to other values. Then

Copyright © 1988-2006, Oracle. All rights reserved.

use the Edit Table field, which becomes available, to specify the prompt table from which the field derives its valid values. The System Values field in the grid prompts you to select each prompt table value that you want to map to another value.

- *Xlat* (translate): Select this option if the system values are derived from a translate table and you want to map these translate values to other values. The System Values field in the grid prompts you to select each translate value that you want to map to another value.

Note. To successfully map system values to an alternate value, you must know the type of table edit that is associated with the field that you are mapping. In this way you preserve data integrity so that the system is able to accurately remap values during data validation of an XML file. You select the field on the Node Table page in the Field Name field.

Edit Table If you select to map field values from a record, select the prompt table from which the field derives its valid values.

Mapping To Select how you want to define the new valid field values that you are mapping to. After you make a selection, use the Node Value field in the grid below to specify the new value to replace the system value. Your choices are:

- *Code Table:* Select this option to map values to a value that exists on an XML code table. The Code Table field becomes available for edit.
- *Manual:* Select this option to map system values to a value that you manually define.
- *None:* Select this option there is no need to map system values to another value.

Reg Region (regulatory region) Select the regulatory region to use to filter possible code tables to a specific setID. Code tables contain a setID. By selecting the regulatory region, the system enables you to select only the code tables with the same setID as the regulatory region.

Code Table If you select to map new field values to values from an XML code table, select the code table. Define XML code tables on the XML Code Table page.

System Value and **Description** Specify the system field value from which you are mapping to another more appropriate value for the XML file. If you are mapping from a field where the valid values are derived from translate tables or propmt tables, select the value that you want to change. If you are mapping from fields where the valid values are derived by manual entry into the system, enter the value that you want to change. The value that you enter manually must be identical to the value defined through user entry.

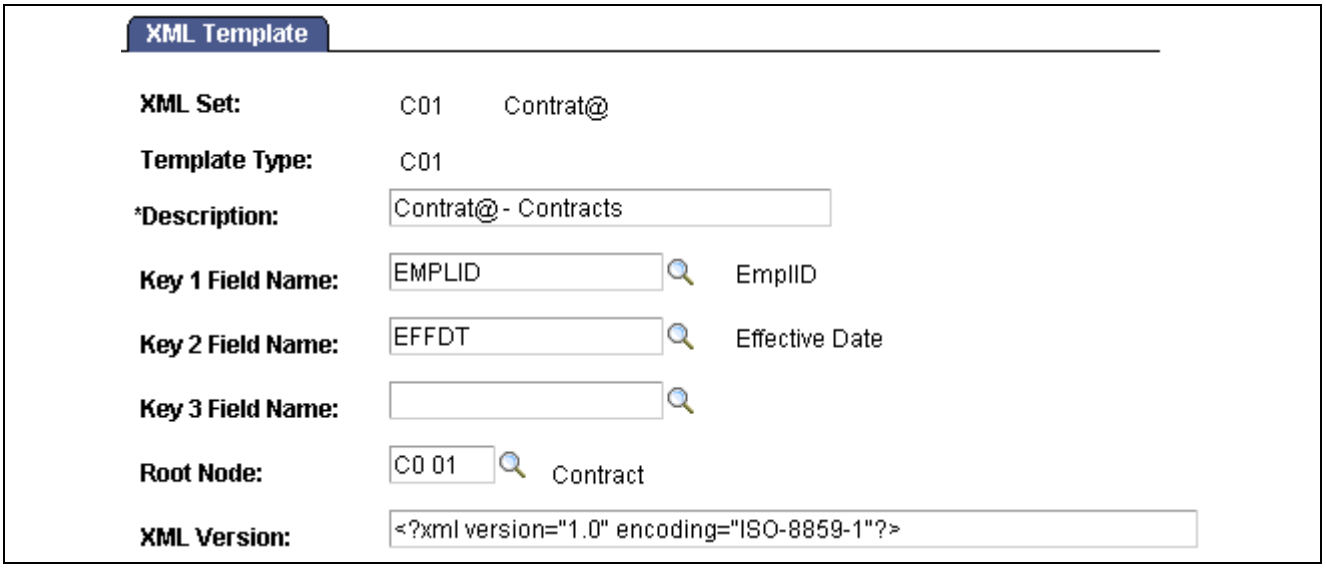
For translate values and table record values, the system displays the description of your selection.

Node Value and **Description** Select or enter the node value to which you are mapping the system value. If you have selected to map to a code table in the Mapping To field, the system prompts against the values in the XML code table that you specify. For XML code table values, the system displays the description of your selection.

Copyright © 1988-2006, Oracle. All rights reserved.

Defining XML Templates

Access the XML Template page.



XML Template page

XML Set When defining new XML Templates, select the XML set to which the template belongs.

Template Type The identifying code of the template.

Description Enter a description of the XML template.

Key 1 Field Name, Key 2 Field Name and **Key 3 Field Name** Specify the fields that you want to use as keys for the different levels of data that you are reporting with the XML template. These fields indicate the key structure of the table from which the system retrieves data for reporting through XML files.

For example, with Contrata reporting you define EmplID and EFFDT as the key fields to indicate that you are reporting employee information based on the effective date of the contracts. With Delta reporting, you define three levels—company, employee, and effective date (or the incident)—to deliver XML files that include information keyed at the company level, employee level, and incident level.

When you map a node to a record and field that exist in the database through the XML Node Table component, the record that you select must have at least one of these keys as a record key because the Where clause is built dynamically to use these fields.

The system also uses the key fields that you define here as filter criteria when you confirm or unconfirm the sending of XML files that are based on this XML template. Confirm XML files through the XML File Confirmation ESP component.

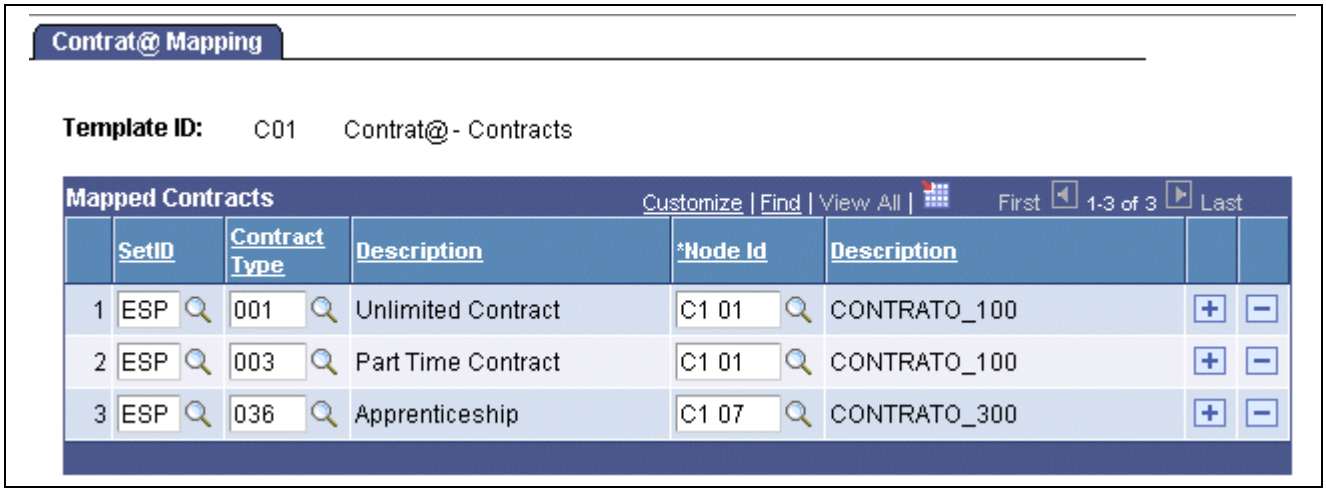
Root Node Select the root node for the XML template. By identifying the root node for the XML template you are setting the whole structure of the XML file because the root node contains in a recursive mode the whole structure. The root node is the starting point of the XML structure. Define root nodes on the XML Node Table page.

Copyright © 1988-2006, Oracle. All rights reserved.

XML Version Specify the version of the XML files that are based on this template. Each XML file needs to include a first line that states the version.

Mapping Contracts to XML Nodes

Access the Contrat@ Mapping page.



Contrat@ Mapping page

Template ID You can access this page for templates that you have already defined. Define templates on the XML Template page.

SetID Select the setID of the contract type. The system selects ESP by default.

Contract Type and **Description** Select the contract type for which you want to specify the starting node. The system prompts you to select from contract types that are defined for the selected setID.

Node ID and **Description** Select the Contrata node to which you want to map the specified contract type. By associating this node to each contract type, you are defining the XML file format and structure for the contract type. Each contract type can require different information to be reported so you must assign different XML structure to each of them .

Managing Contrata Communications

This section provides an overview of Contrata (Sistema Contrat@) communication management, lists steps to manage Contrata XML file generation, lists prerequisites, and discusses how to:

- Define the XML file.
- Generate the XML file for Contrata reporting.
- View employee details for Contrata reporting.
- Preview XML files.
- Manage response files.
- View Contrata errors.

Copyright © 1988-2006, Oracle. All rights reserved.

Understanding Contrata Communication Management

Contrata is a web service of the Public Service of Employment (I.N.E.M.) that enables companies to file new employees' employment contracts, change an employee's situation from temporary to permanent, notify I.N.E.M. of extensions to contracts, and carry out other legally required processes. When companies submit the communication online to I.N.E.M. they receive an immediate response notifying them of errors. Companies can then correct the errors before confirming the communication. It is mandatory that companies communicate contract data to I.N.E.M.

Human Resources for Spain provides Contrata communication functionality that enables you to track multiple persons' labor contract data and to generate an XML flat file to send to I.N.E.M. This feature combined with the Contrata web service eliminates the paper communication between companies and I.N.E.M. and enables companies to communicate data for multiple persons at once, thus reducing time and costs.

Contrata XML files contain all of the data related to the hiring of employees between two dates for a specific type of contract communication. Human Resources for Spain delivers the templates to create XML files to use for Contrata communications of labor contracts, basic copy, and extensions. The XML file generation process obtains data from the HRMS database and from data that you enter when generating the XML file. Once you generate the XML file you can then upload the file through the Contrata web service.

To use the Contrata communication management functionality you must first review the delivered XML file setup data during implementation to ensure that it complies with your company's requirements. This setup includes defining the XML sets, code tables, nodes, and templates necessary for the XML generation process to gather data and generate the XML file. Human Resources for Spain delivers a large percentage of this setup data to facilitate implementation.

Once you complete the XML setup, you can then use the Create Contrat@ XML File ESP component to search for and select the persons for whom you need to report Contrata data, load their data into an XML file template, add additional required data, validate the data, and generate the XML file.

Next you can send your completed XML files to I.N.E.M. through the Contrata web service. Use the XML File Confirmation ESP component to confirm the sending status of communications. The system automatically tracks which persons you have included in communications in order to avoid situations where you report data multiple times for the same person, resulting in unintentional overriding and overlapping of data.

After I.N.E.M. sends your company a response XML file regarding your Contrata communication, you can use the Create Contrat@ XML File ESP component to review the XML response file for errors and make necessary changes. Depending on the error and communication status, you can then communicate the correct data either by contact I.N.E.M. or regenerate the XML file communication for persons whose data is in error.

Delivered XML Codes for Contrata Reporting

The Spanish social security administration (I.N.E.M.) delivers tables with a simple structure of code equals value, with each of these tables containing numerous values. Human Resources for Spain delivers the social security tables as XML code tables for Contrata reporting, providing many of the table values as sample data. During implementation, you must review the setup data to ensure that it complies with your company's requirements.

The following table describes the data tables within the XML Code Tables component that relate to the Contrata communication functionality:

XML Code Table	Description	Used By
TELCOLBO	Bonification Groups	Contrata
TEKLEYBO	Bonification Law	Contrata

Copyright © 1988-2006, Oracle. All rights reserved.

XML Code Table	Description	Used By
TDPMUNIC	City Codes	Contrata
TERFIRCB	Clause Signature	Contrata
TEHTPCTO	Contract Codes	Contrata
TERRORES	Contrata Errors	Contrata
TEVACTCL	Council Activity	Contrata
TEUECCLL	Council Codes	Contrata
SPAISXTC	Country	Contrata
STIACATC	Degree	Contrata
THITIACA	Degree (SISPE)	Contrata
TEJINDIS	Disability Types	Contrata
TESCETCO	ET / CO / TE Contracts	Contrata
TBONVFOR	Education Level	Contrata
TETPGMEM	Employment Program	Contrata
SSEXOXTC	Gender	Contrata
SACECOTC	Industrial Activity	Contrata
TEIINTER	Interim Reasons	Contrata
STDIDETC	NID Type	Contrata
TAICLAOC	Official Occupation Codes CNO-4	Contrata
SOCUPATC	Official Occupation Codes CNO-8	Contrata
TEQPTIEM	Period	Contrata
TAUCOMAU	Region	Contrata
THYDISLE	Regulations	Contrata
TEYTRELE	Relieve Employee	Contrata
TEXTINVE	Research Employee	Contrata
TEWEINVE	Research Employer	Contrata
TFGGRCOT	SS Work Groups	Contrata
SREGCOTC	Scheme	Contrata

Copyright © 1988-2006, Oracle. All rights reserved.

XML Code Table	Description	Used By
SPROVITC	States	Contrata
THPCOLFO	Training Contract Groups	Contrata
TENLEYDE	Unlimited Contract Regulation	Contrata
TEOCOLDE	Unlimited Contract Regulation Groups	Contrata
ONE_TWO	Yes/No Table (1/2)	Contrata and Delta
YESNO	Yes/No Table (S/N)	Contrata and Delta

Delivered XML Nodes for Contrata Reporting

Human Resources for Spain delivers XML file structures for Contrata communication management functionality. You can also define your own XML file structures through this component by creating additional nodes and relating them to each other.

Delivered XML Templates for Contrata Reporting

Human Resources for Spain delivers three different types of communications for Contrata reporting. Use the XML Template Table component to define templates for the types of communication that you use for XML file generation. You can define as many XML templates as necessary to meet your company needs. Human Resources for Spain delivers as system data the following XML templates:

XML Template	Description
Contrat@ - Contracts	Used to communicate new contracts.
Contrat@ - Extensions	Used to communicate extension of a contract.
Contrat@ - Basic Copy	Used to communicate the clauses of a contract.

After you have defined XML templates, you can use the Contrat@ Mapping component to link Contrata contract types with XML root nodes.

Steps to Manage Contrata XML File Generation

Once you have entered all of the data necessary for Contrata reporting, you can use the Create Contrat@ Report ESP component to create the Contrata report in XML file format for reporting to I.N.E.M.

To complete the Contrata XML file generation process:

1. Access the Create Contrat@ XML File ESP component.
2. Select the template (type of communication) to use for the XML file on the Create Contrat@ XML File ESP - Definition page.
3. Move to the Create Contrat@ XML File ESP - Generation page, specify report parameters, and search for persons to include in the report.
4. Select from the search results the persons to include in the report.
5. Load data for the selected persons into the XML file.

Copyright © 1988-2006, Oracle. All rights reserved.

6. View a person's data details for the XML file and enter additional information.
7. Validate the data for the XML file.
8. Preview the XML file.
9. Generate the XML file.
10. Send the XML file to I.N. E.M through the Contrata web service.
11. Load the XML response file from I.N.E.M on the Load Response File and evaluate the status of the persons included on the Contrata XML file.
12. View any errors on the Contrat@ Error page, and then manually fix the errors in the system either at the source or through the Create Contrat@ XML File ESP - Details page.
13. Regenerate and resend the Contrata XML file for persons with errors in the response file as necessary.
14. Confirm or unconfirm the sending of the XML file through the XML File Confirmation ESP component.

The XML file generation process stores a record of the data sent in the communication to track which persons you have already processed. Note that you can include only one type of communication per XML file.

Prerequisites

Before you can use the Contrata communications functionality you must first define Spanish workforce data related to Contrata XML files in the appropriate setup pages. This Spanish workforce data includes XML templates, codes, and nodes.

See Also

Chapter 11, "(ESP) Managing Spanish Reporting," Setting Up XML Files, page 411

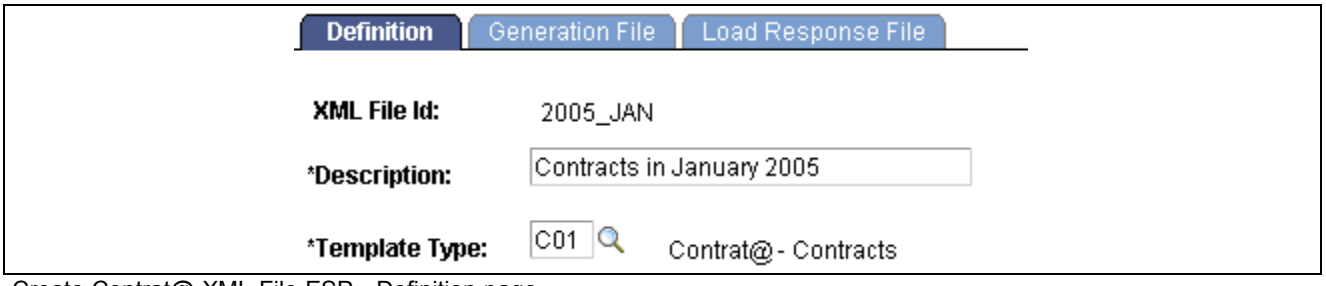
 Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Manage Contrata XML File Generation

Page Name	Object Name	Navigation	Usage
Create Contrat@ XML File ESP - Definition	CTTA_DEFN_XML1_ESP	Workforce Administration, Workforce Reports, Create Contrat@ XML File ESP, Definition	Set up the XML file definition for the Contrata communication.
Create Contrat@ XML File ESP - Generation File	CTTA_CRET_XML2_ESP	Workforce Administration, Workforce Reports, Create Contrat@ XML File ESP, Generation File	Search for and select the employees for whom you need to communicate contract data to I.N.E.M., load and review their data, and then generate the XML file that you must send to I.N.E.M.
XML Preview ESP	XML_PREVIEW_SEC	Click the Preview XML button on the Generation File page.	View a preview of the XML file for the Delta service or Contrata service before generating the XML file.
Create Contrat@ XML File ESP - Details	XML_LVL2_SEC	Click the Details link for a specific person on the Generation File page.	View the contract data that the system has loaded into the XML file for the person and complete the missing information that is required in the XML file.
Load Response File	CTTA_RESP_XML3_ESP	Workforce Administration, Workforce Reports, Create Contrat@ XML File ESP, Load Response File	Load the Contrata response file from I.N.E.M. to view the reporting status of each person in the Contrata XML file previously sent to I.N.E.M.
Contrat@ Error	CTTA_ERROR_ESP_SEC	Click the Details link on the Load Response File page.	View descriptions of the errors associated with a selected persons Contrata data according to the Contrata response file.

Defining the XML File

Access the Create Contrat@ XML File ESP - Definition page.



Create Contrat@ XML File ESP - Definition page

Copyright © 1988-2006, Oracle. All rights reserved.

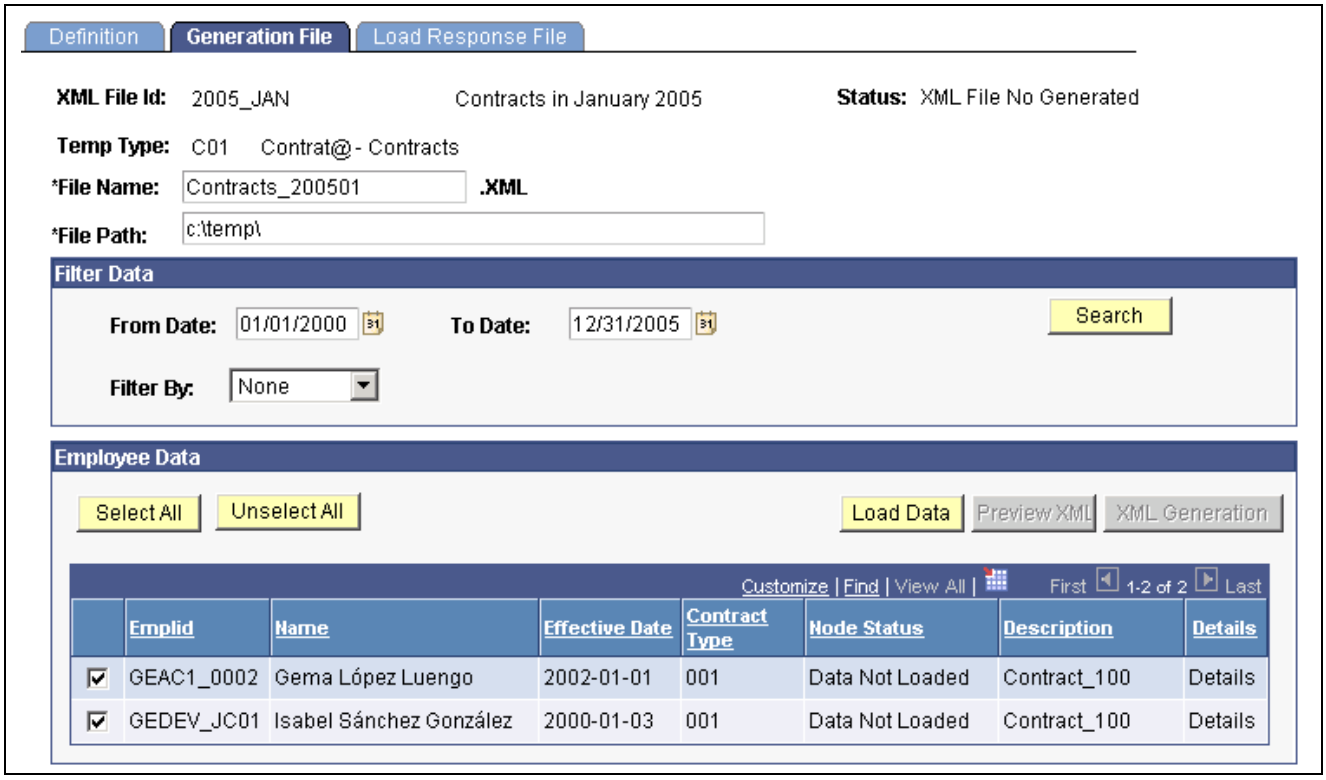
XML File ID When generating a new XML file, enter an identifier for the XML file generation upon entering the component. You use this identifier to confirm or un-confirm the sending of an XML file on the XML Confirm page.

Description Enter a description for the XML file that you are generating.

Template Type Select the XML template that you want the XML file generation process to use when generating the XML file. The valid values that you can select depend on the component through which you are generating the XML file. You define XML templates on the XML Template Table page.

Generating the XML File for Contrata Reporting

Access the Create Contrat@ XML File ESP - Generation File page.



Create Contrat@ XML File ESP - Generation File page

Status Shows the status of the communication for the XML file. Possible values are:

- *XML File No Generated:* The XML file has not yet been generated.
- *XML File Created:* The XML file has been generated. The system updates the field to this value when you generate the XML file or when you press the Unconfirm All button on the XML Confirm page.
- *XML File Sent and Confirmed:* The XML file has been sent and confirmed as sent. The system updates the field to this value when you press the Confirm All button on the XML Confirm page.

This is the same field that appears on the XML Confirm page. Upon saving your changes, the system reflects the new value on that page as well.

Copyright © 1988-2006, Oracle. All rights reserved.

File Name Enter the name of the file that you want the process to use for the report. The system stores the data in a XML file.

File Path Enter the path where you want the process to store the report file.

Filter Data

Use this group box to search for persons who have contract information that you need to report to I.N.E.M. Use the search criteria to narrow your search results.

From Date and **To Date** Enter the date range to search for persons within that timeframe who require XML file generation for Contrata reporting.

Filter By Use the filter by option to narrow your search results to a specific social security number (CCC), company, or employee. If you select one of these filter options, the system displays a grid for you to enter the additional search criteria.

Company and **Description** Select a specific company to search for persons within that company who require XML file generation for Contrata reporting. The system displays the description of the company that you select.

EmplID (employee ID) and **Name** Select a specific employee to search for his or her contracts that require XML file generation for Contrata reporting. The system displays the name of the employee that you select.

Company, Description, and **Social Security Number** Select a specific company and social security number to filter your search results to based on social security number. The system displays the name of the company that you select.

Search Press this button to search for persons who require XML file generation for Contrata reporting based on your filter criteria.

Employee Data

Use this group box to view the results of your search and select the persons to include in the XML file for Contrata reporting.

Select All Press this button to select all rows in your search results. Otherwise, select the check box for each person that you want to include in the XML file.

Unselect All Press this button to clear the selection check box for all persons in the search results grid.

EmplID and **Name** The system displays the ID and name of the persons that meet your search criteria. Select the check box for persons that you want to include in the XML file.

Effective Date The system displays the date when the contract type is associated with the employee. You associate contract types with employees through the Contract Type/Clauses page of the Update Contracts component.

Contract Type The system displays the type of legal contract associated with the employee. You associate contract types with employees through the Contract Type/Clauses page of the Update Contracts component.

Node Status The system automatically displays the status of data for each employee being reported. Possible values are:

Copyright © 1988-2006, Oracle. All rights reserved.

- *Data OK:* The employee's data has been successfully loaded but the XML file has not yet been sent and confirmed.
- *XML Sent Confirmed:* The employee's data has been successfully included in the XML file and there is confirmation that the XML file has been sent. You must use the XML Confirm page to update the XML file status to this value.
- *Required Data:* The employee's data has been included in the XML file but there is still data required for the employee before the XML file can be sent.
- *Not Validated:* The employee's data has been loaded in the XML structure but not yet validated.

This is the same field that appears on the XML Confirm page. Upon saving your changes, the system reflects the new value on that page as well.

Description The system displays the description of the node that is mapped to the contract type of the employee, as defined on the Contrat@ Mapping page.

Details Click this link to access the Create Contrat@ XML File ESP - Details page, where you can view the contract data that the system has loaded into the XML file for the person and complete the missing information that is required in the XML file.

Load Data Press this button to load contract data into the XML file for all of the selected persons. After you load data, this button converts to the Validate button and the Details link becomes available for each row of data that you included in the data load.

Validate Press this button to have the system validate that the required data for each person is included in the XML file. The system displays the status of the validation in the Node Status field for each of the selected persons.

You must enter all required data and have a Node Status value of Data OK for all of the selected employees before you can generate the XML file. When you validate the required data, the Preview XML button becomes available. Once you have a node status of successful for all of the selected employees and save the page, the XML Generation button become available.

Note. You must save the page before generating an XML file.

Preview XML Press this button to access the XML Preview page, where you can preview the XML file for the Delta service or Contrata service before generating the XML file. This button becomes available only after you load data into the XML file.

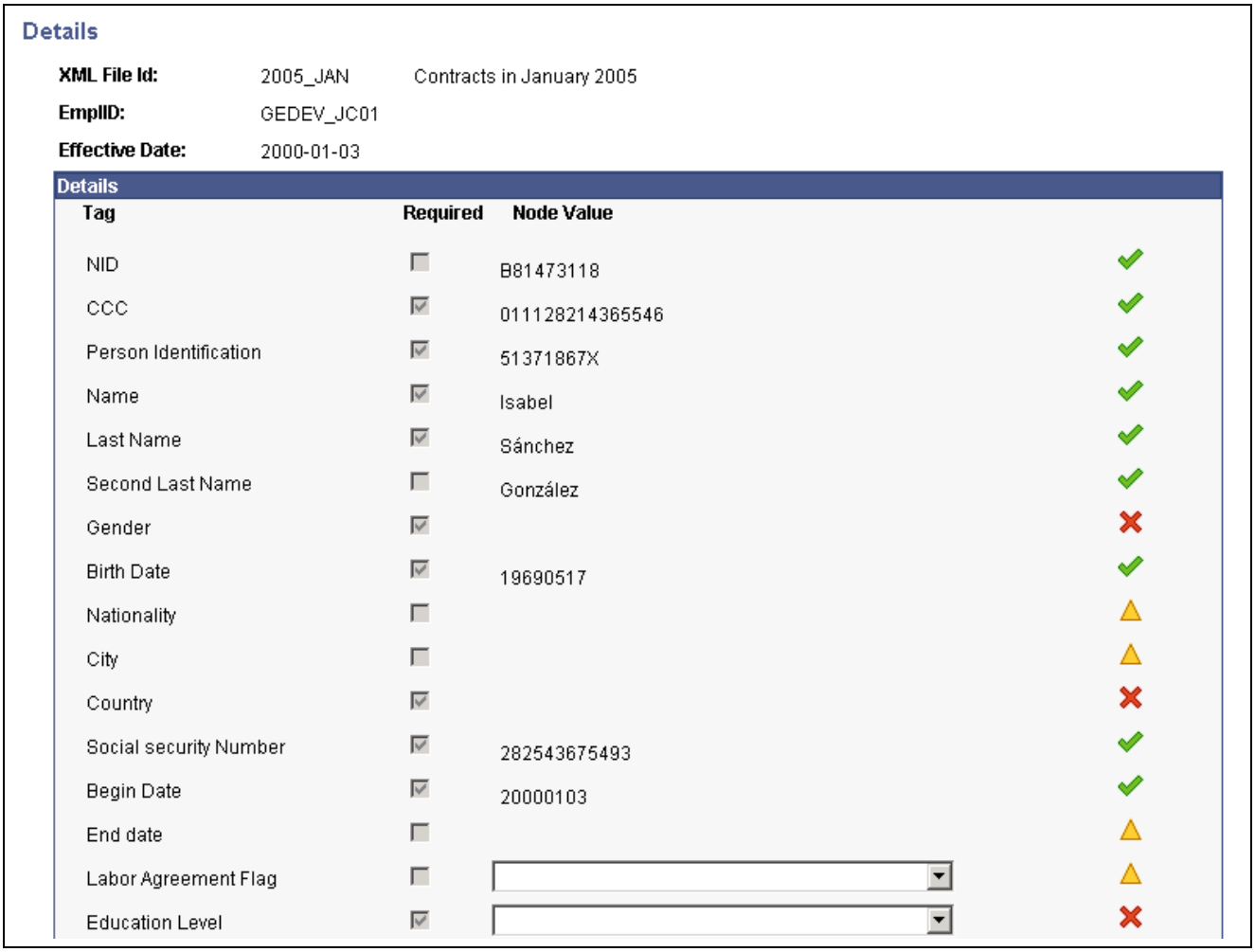
XML Generation Press this button to generate the XML file with the contract data for the selected persons. The system executes the XML file generation batch process, which creates the XML file based on the selected template ID. The batch process saves the XML file to the location that you specify in the run parameters. The batch process also updates the Status field to the XML File Created value for the XML file ID.

Provided that you have not confirmed the sending of the XML file through the XML Confirm page, you can change or add data and rerun the process as many times as necessary. The Status field indicates whether the sending of the XML file is confirmed.

Copyright © 1988-2006, Oracle. All rights reserved.

Viewing Employee Details for Contrata Reporting

Access the Create Contrat@ XML File ESP - Details page.



Create Contrat@ XML File ESP - Details page



Nodes that display this symbol are not required. They have no data but are available for optional data entry.



Nodes that display this symbol have data that you entered manually or that the system retrieved from the database.



Nodes that display this symbol require a value but currently have no value entered. Enter the required data necessary to complete the report. Depending on the node definition, you must either enter a value directly through this page or go to the source page to enter the value.

Tag Tags are the node names as they appear in the XML file. The system retrieves tags based on the node definition as defined on the XML Node Table page.

Required Indicates whether the node is required for reporting.

Node Value The system displays the value for the corresponding tag. Enter or select additional data that you want to include in the report. You must provide node values for all required tags.

Copyright © 1988-2006, Oracle. All rights reserved.

OK	Press this button to save data and return to the previous page.
Cancel	Press this button to cancel any changes that you have made and return to the previous page.

Previewing XML Files

Access the XML Preview ESP page.

XML Preview ESP

```
<CONTRATOS>
    <CONTRATO_100>
        <DATOS_EMPRESA>
            <CIF_NIF_EMPRESA>
                <CIF_NIF>B81473118</CIF_NIF>
            </CIF_NIF_EMPRESA>
            <CODIGO_CUENTA_COTIZACION>011128214365546</CODIGO_CUENTA_COTIZACION>
        </DATOS_EMPRESA>
        <DATOS_TRABAJADOR>
            <IDENTIFICADORPFISICA>D46563414Y</IDENTIFICADORPFISICA>
            <NOMBRE_APELLIDOS>
                <NOMBRE>Alberto</NOMBRE>
                <PRIMER_APELLIDO>Lopez</PRIMER_APELLIDO>
                <SEGUNDO_APELLIDO>de La Cruz</SEGUNDO_APELLIDO>
            </NOMBRE_APELLIDOS>
            <SEXO>2</SEXO>
            <FECHA_NACIMIENTO>19701005</FECHA_NACIMIENTO>
            <NACIONALIDAD>724</NACIONALIDAD>
            <MUNICIPIO_RESIDENCIA>28079</MUNICIPIO_RESIDENCIA>
            <PAIS_RESIDENCIA>724</PAIS_RESIDENCIA>
            <NUMERO_SEGURIDAD_SOCIAL>289122785369</NUMERO_SEGURIDAD_SOCIAL>
        </DATOS_TRABAJADOR>
        <DATOS_GENERALES_CONTRATO>
            <FECHA_INICIO>20020101</FECHA_INICIO>
            <FECHA_TERMINO>20021230</FECHA_TERMINO>
            <IND_CONVENIO_COLECTIVO>S</IND_CONVENIO_COLECTIVO>
            <NIVEL_FORMATIVO>32</NIVEL_FORMATIVO>
            <IND_DISCAPACIDAD>S</IND_DISCAPACIDAD>
            <CODIGO_OCUPACION>79420329</CODIGO_OCUPACION>
            <ID_OFERTA>____</ID_OFERTA>
            <CODIGOPROGRAMAEMPLEO>09</CODIGOPROGRAMAEMPLEO>
            <NACIONALIDAD_CT>724</NACIONALIDAD_CT>
            <MUNICIPIO_CT>08002</MUNICIPIO_CT>
            <OTRAS_LEGISLACIONES>002</OTRAS_LEGISLACIONES>
        </DATOS_GENERALES_CONTRATO>
        <DATOS_MEDIDAS_FOMENTO>
            <IND_COSTE_DESPIDO>2</IND_COSTE_DESPIDO>
            <CODIGO_COLECTIVO_DESPIDO>07</CODIGO_COLECTIVO_DESPIDO>
        </DATOS_MEDIDAS_FOMENTO>
    </CONTRATO_100>
</CONTRATOS>
```

XML Preview ESP page

Copyright © 1988-2006, Oracle. All rights reserved.

This page displays a preview of the XML file for the selected person using the template ID that you selected on the Definition page of this component. The system loads data into this page when you press the Load Data button on the Generation File page.

Note that to generate the XML file with the correct template, you must select the correct template and use the appropriate report component. For example, to generate a XML file for a PAT report, you must use the Create Delt@ PAT/RAF Report ESP component and select the Delt@ PAT template.

Managing Response Files

Access the Load Response File page.



Load Response File page

File Name Enter the name of the response file that you want to retrieve.

File Path Enter path from where you want to upload the XML response file from I.N.E.M.

Load XML File Click this button to load employee data from the XML response file into this page.

Employee Data

EmplID and **Name** The system displays the employee IDs of all of the persons included in the response file.

Effective Date The date when the contract type is associated with the employee. You associate contract types with employees through the Contract Type/Clauses page of the Update Contracts component.

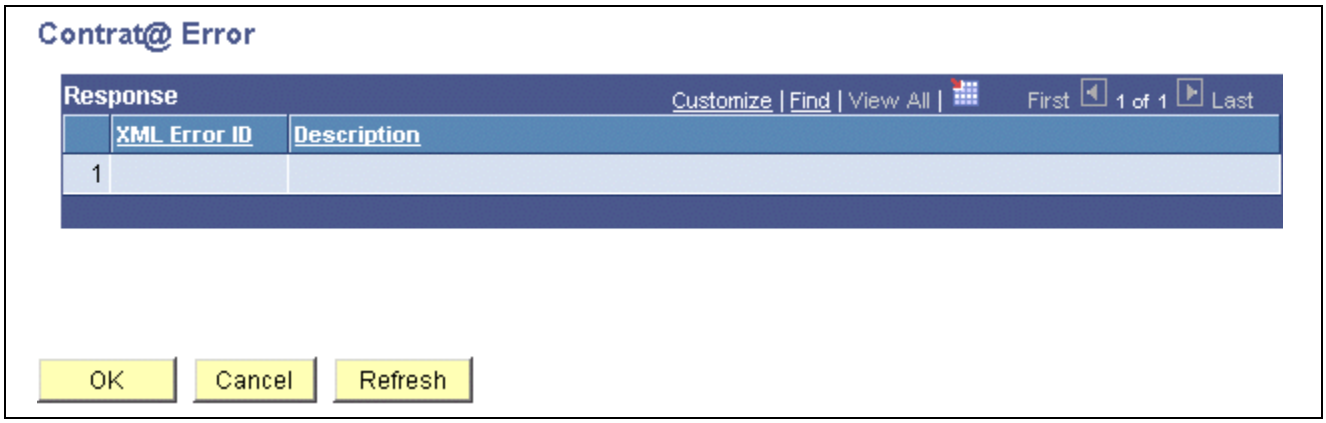
Communication Status Indicates whether the employee data that was sent to authorities is accepted. Possible values are accepted, accepted with errors, or rejected. If an employee's communication has errors, the system displays the Details link to view error details. If authorities reject an employee's data, your company must fix the errors in the system and resend the corrected employee data, either through the same XML file ID or by generating a new XML file.

Details Click this link to access the Contrat@ Error page, where you can view descriptions of the errors associated with a selected person's Contrata data according to the Contrata response file.

Viewing Contrata Errors

Access the Contrat@ Error page.

Copyright © 1988-2006, Oracle. All rights reserved.



Contrat@ Error page

The system displays the XML Error ID and a description of the error. After viewing the errors you can then manually fix the errors in the system either at the source or through the Create Contrat@ XML File ESP - Details page.

Managing Delta Communications

This section provides an overview Delta (Sistema Delt@) communication management, lists the steps to manage industrial accident information, lists prerequisites, and discusses how to:

- Define the XML file.
- Generate the XML file for Delta reporting.
- View employee details for Delta reporting.
- Preview XML files.

Understanding Delta Communication Management

Every company must report to the Work Minister, external insurance companies, and other management entities the details of industrial accidents that occur to employees. Regulations require that companies report these industrial accidents through Delta reports within a given timeframe.

There are three types of Delta accident reports:

- Industrial accident report where the company must send a report that lists all employees with absences due to an industrial accident (PAT).
- Industrial accident report where the company must send a report that lists employees involved in an industrial accident resulting in no absence (RATSB).
- Report that lists employees who have finished the industrial accident absence because of medical discharge or death (RAF).

Human Resources for Spain provides Delta communication functionality that enables you to efficiently communicate to management entities the information about industrial accidents. This functionality helps speed the distribution of information, reduce costs, and simplify communications while guaranteeing the confidentiality of the content of documents.

The basic flow of industrial accident data is as follows:

Copyright © 1988-2006, Oracle. All rights reserved.

1. The accident takes place and the person informs the company with or without a sick note.
2. The company records all incident and injury details about the industrial accident in the system.
3. The company generates the appropriate XML file and sends it to the management entities.
4. If errors exist the management entities return their copies to the company.
5. The company corrects the errors and resends copies to the management entities.

Using Human Resources for Spain, you record all data necessary for the Delta accident reports through components in the Human Resources Health and Safety business process. The Health and Safety business process enables you to create and track incidents related to health and safety for employees and non-employees. It also enables you to associate multiple individuals with a single incident. Specifically, use the Incident Details component and the Injury Details component to enter the necessary data for XML file generation. Through the Incident Details component you can enter or update industrial accident data. Through the Injury Details component you can enter the necessary data about people involved in an industrial accident.

Once you have entered all of the data necessary for Delta reporting, you can use the Create Delt@ PAT/RAF Report ESP component and the Create Delt@ RATSB Report ESP component to create the Delta report in XML file format for accident reporting to the management entities. Within these two components you can search for employees and incident types matching your filter criteria, select the employees for whom you want to send data to the insurance company, and generate the XML files. Human Resources for Spain provides a unique XML file template for each of the Delta accident reports. The template provides the file structure in XML format.

Use the Confirm/Unconfirm component to track whether you have sent the XML file to the management entity or cancelled the sending of the file. You can track this information by the sending ID that the XML generation process creates for each XML file that you generate.

If you make changes to the report data or the management entities find errors in the report and return the XML file, you can use these same components to correct the errors and resend the XML file.

The Delta communication functionality is integrated with other PeopleSoft applications for integral management of data. In addition, both the Delta communication functionality and the Contrata functionality share components related to data setup, XML file setup, and XML file generation. The Contrata documentation provides further details about these topics.

Delivered XML Codes for Delta Reporting

The Spanish social security administration (I.N.E.M.) delivers tables with a simple structure of code equals value, with each of these tables containing numerous values. Human Resources for Spain delivers the social security tables as XML code tables for Delta reporting, providing many of the table values as sample data. During implementation, you must review the setup data to ensure that it complies with your company's requirements.

The following table describes the data tables within the XML Code Tables component that relate to the Delta communication functionality:

XML Code Table	Description	Used By
DIG	Body Part	Delta
CNT	Contact Types	Delta
INJ	Injury Description	Delta
DEV	Irregular Activity	Delta

Copyright © 1988-2006, Oracle. All rights reserved.

XML Code Table	Description	Used By
TOL	Material Agent	Delta
CNO	Official Occupation Codes CNO-2	Delta
TSK	Physical Activity	Delta
PLC	Place Type	Delta
WRK	Work Type	Delta
ONE_TWO	Yes/No Table (1/2)	Contrata and Delta
YESNO	Yes/No Table (S/N)	Contrata and Delta

Delivered XML Nodes for Delta Reporting

Human Resources for Spain delivers XML file structures for Delta communication management functionality. You can also define your own XML file structures through this component by creating additional nodes and relating them to each other.

Delivered XML Templates for Delta Reporting

Human Resources for Spain delivers three different types of communications for Delta reporting. Use the XML Template Table component to define templates for the types of communication that you use for XML file generation. You can define as many XML templates as necessary to meet your company needs. Human Resources for Spain delivers as system data the following XML templates:

XML Template	Description
DELT@ PAT	Used for communication of industrial accident with sick note.
DELT@ RATSB	Used for communication of industrial accident without sick note.
DELT@ RAF	Used for communication of discharge or death.

See Also

Chapter 11, "(ESP) Managing Spanish Reporting," Managing Contrata Communications, page 422

Steps to Manage Industrial Accident Information

This section describes the steps necessary to enter industrial accident data and generate the related XML files for reporting.

To manage industrial accident information:

1. Complete the prerequisite setup for the Delta communication functionality.
2. Set the Delta data Preventive option for a company on the Company Setup page.
3. Enter the insurance company code on the Establishment Address page.

 Copyright © 1988-2006, Oracle. All rights reserved.

4. Use the Incident Details component to complete these steps:
    a. Enter the incident number of the accident, incident date, and incident time, and select whether the incident is a recurrence on the Incident Details - Incident page.
    b. Enter a long description of the incident in the Description text box on the Incident Details - Description page.
    c. On the Incident Details - Location page enter the location, address, and establishment information where the accident occurred, and, if applicable, select the Car Incident check box to indicate that the incident is a car accident.
    d. Enter any other data related to the incident on the remaining pages of the component.
5. For an PAT incident, use the Injury Details - Injury component to:
    a. Access the Injury Details - Injury page and specify for each accident the employee or non-employee involved, the date reported, and the time reported.
    b. Select the PAT value in the Incident Type Esp field.
    c. Specify the absence begin date, working hours, and whether the incident is a relapse occurrence.
    d. Click the Accident with sick note link to access the Detailed PAT Data page, where you must specify PAT data details about the employee, employer, and place of incident.
    e. Enter an end date on the Injury Details - Injury page so that the PAT becomes a RAF only if the PAT results in a medical discharge or death.
    f. Click the Medical Discharge or Death link to access the Detailed RAF Data page, where you must define the reason for discharge, the injury grade, and the diagnosis code.
    g. Move to the Injury Details - Details page and click the Accident with sick note link to access the Detailed Pat Data page, where you can specify further details of the PAT incident.
    h. Move to the Injury Details - Diagnosis page and click the Accident with sick note link to access the Detailed PAT Data page, where you can specify medical assistance and economic data for the PAT incident.
    i. Enter any other data related to the injury in the remaining pages of the component.
6. For an RATSB incident, use the Injury Details - Injury component to:
    a. Access the Injury Details - Injury page and specify for each accident the employee or non-employee involved, the date reported, and the time reported.
    b. Select the RATSB value in the Incident Type Esp field.
    c. Move to the Injury Details - Details page and click the Accident without sick note link to access the Detailed RATSB Data page, where you can specify further details of the RATSB incident.
    d. Enter any other data related to the injury in the remaining pages of the component.
7. Use the Create Delt@ PAT/RAF Report ESP component or the Create Delt@ RATSB Report ESP component to:
    a. Select the template to use for the XML file.
    b. Specify report parameters and search for persons to include in the report.
    c. Select from the search results the persons to include in the report.
    d. Load data for the selected persons into the XML file.
    e. View a person’s data details for the XML file and enter additional information.
    f. Validate the data for the XML file.
    g. Preview the XML file.
    h. Save the page.

Copyright © 1988-2006, Oracle. All rights reserved.

i. Generate the XML file.

8. Send the XML file to the management entity using the XML Confirm page, or unconfirm the sending of an XML file for persons based on XML file ID.
9. If you make changes or corrections to an XML file that requires you to resend the Delta communication report:
   a. Go to the XML Confirm page and change the employee node status value from XML Sent Confirmed to Data OK.
   b. Use the Create Delt@ PAT/RAF Report ESP component or the Create Delt@ RATSB Report ESP component to regenerate the modified XML file.

Note. For the system to include a person in XML file reports that the Delta service generates, the person must work for a company where you have specified the Delta data option on the Company Setup page.

See Also

Chapter 3, "Setting Up Country-Specific Tables," Entering Social Security Company Information, page 75

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," Defining Establishments

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Monitor Health and Safety, "Creating and Tracking Incidents," Entering Health and Safety Incident Details

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Monitor Health and Safety, "Creating and Tracking Incidents," Entering Injury Details

Prerequisites

Before you can use the Delta communications functionality first you must define Spanish workforce data related to Delta accident report XML files in the appropriate setup pages. This Spanish workforce data includes XML templates, codes, and nodes.

See Also

Chapter 11, "(ESP) Managing Spanish Reporting," Setting Up XML Files, page 411

Pages Used to Manage Delta Communications

Page Name	Object Name	Navigation	Usage
Company Setup	SOCS_SETUP_ESP	Set up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Social Security Company Setup, Company Setup	Enter specific company information, including data needed for social security purposes.
Establishment Address	ESTAB_TBL1_GBL	Set Up HRMS, Foundation Tables, Organization, Establishment, Establishment Address	Create an information profile for each of your business establishments: Identify the establishment, indicate its regulatory region, and enter the address.

 Copyright © 1988-2006, Oracle. All rights reserved.

Page Name	Object Name	Navigation	Usage
Incident Details - Incident	HS_INCIDENT	Workforce Monitoring, Health and Safety, Obtain Incident Information, Incident Details, Incident	Add a new incident or update an existing incident. Be sure to enter the incident number of the accident, incident date, and incident time, and select whether the incident is a recurrence.
Incident Details - Description	HS_INC_DESCRIPTION	Workforce Monitoring, Health and Safety, Obtain Incident Information, Incident Details, Description	Describe the health and safety incident and record related data. Be sure to enter a long description of the incident.
Incident Details - Location	HS_INC_LOCATION	Workforce Monitoring, Health and Safety, Obtain Incident Information, Incident Details, Location	Identify the location where the incident occurred and specify whether the incident was a car accident.
Injury Details - Injury	HS_INJ_NOTIFY	Workforce Monitoring, Health and Safety, Obtain Incident Information, Injury Details, Injury	Enter information about employees and non-employees who have work-related injuries or illnesses.
Detailed PAT Data	HS_PAT1_ESP_SEC	Click the Accident with sick note link on the Injury Details - Injury page.	Enter details about the employee, employer, and place of accident for the PAT incident.
Detailed RAF Data	HS_RAF1_ESP_SEC	Click the Medical Discharge or Death link on the Injury Details - Injury page.	Enter the reason for discharge, the injury grade, and the diagnosis code for the RAF incident.
Injury Details - Details	HS_INJ_DETAIL	Workforce Monitoring, Health and Safety, Obtain Incident Information, Injury Details, Details	Provide details of the injury or illness that is suffered by each person who is involved in the incident.
Detailed PAT Data	HS_PAT2_ESP_SEC	Click the Accident with sick note link on the Injury Details - Details page.	Enter detailed information about the accident that caused the injury for PAT reporting.
Detailed RATSB Data	HS_RATSB_ESP_SEC	Click the Accident without sick note link on the Injury Details - Details page.	Enter detailed data for RATSB reporting.
Injury Details - Diagnoses	HS_INJ_DIAGNOSIS	Workforce Monitoring, Health and Safety, Obtain Incident Information, Injury Details, Diagnoses	Record details about the physician, hospital or clinic, and the medical diagnoses that are involved with the injured and ill employees.
Detailed PAT Data	HS_PAT3_ESP_SEC	Click the Accident with sick note link on the Injury Details - Diagnoses page.	Specify medical assistance and economic data for PAT incidents.

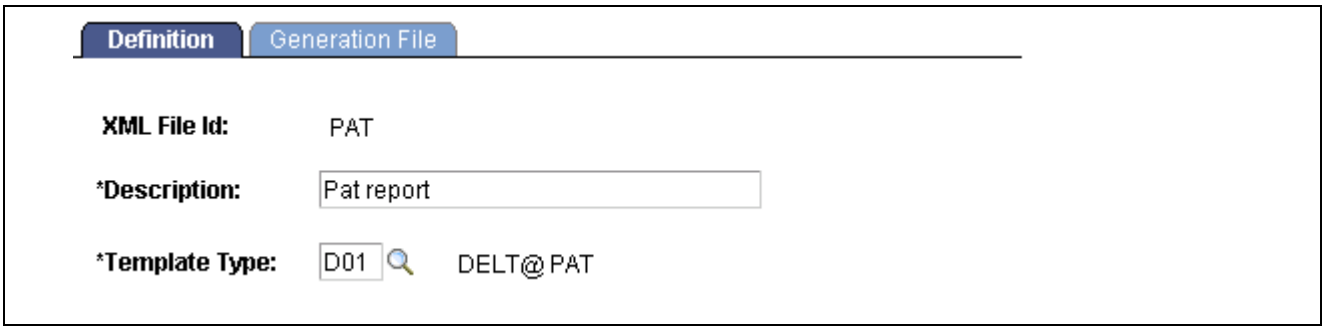
Copyright © 1988-2006, Oracle. All rights reserved.

Page Name	Object Name	Navigation	Usage
Create Delt@ PAT/RAF Report ESP - Definition	DLT_DEFN_XML1_ESP	Workforce Monitoring, Health and Safety, Reports, Create Delt@ PAT/RAF Report ESP, Definition	Set up the XML file definition for the Delta communication. This page is exclusively for PAT/RAF reporting.
Create Delt@ PAT/RAF Report ESP - Generation File	DLT_CRET_XML2P_ESP	Workforce Monitoring, Health and Safety, Reports, Create Delt@ PAT/RAF Report ESP, Generation File	Search for and select the employees for whom you need to communicate PAT and RAF industrial accidents to the insurance companies, load and review their data, and then generate the XML file that you must send to the insurance companies.
Create Delt@ PAT/RAF Report ESP - Details	XML_LVL2_SEC	Click the *Details* link on the Create Delt@ PAT/RAF Report ESP - Generation File page.	View the data that the system has loaded into the XML file for the person's PAT/RAF incident and complete the missing information that is required in the XML file.
Create Delt@ RATSB Report ESP - Definition	DLT_DEFN_XML1_ESP	Workforce Monitoring, Health and Safety, Reports, Create Delt@ RATSB Report ESP, Definition	Set up the XML file definition for the Delta communication. This page is exclusively for RATSB reporting.
Create Delt@ RATSB Report ESP - Generation File	DLT_CRET_XML2R_ESP	Workforce Monitoring, Health and Safety, Reports, Create Delt@ RATSB Report ESP, Generation File	Search for the employees for whom you need to communicate RATSB (=industrial accidents without absence) to the insurance companies, load and review their data, and then generate the XML file that you must send to the insurance companies.
Create Delt@ RATSB Report ESP - Assignment Detail	XML_LVL2_SEC	Click the *Details* link on the Create Delt@ RATSB Report ESP - Generation File page.	View the data that the system has loaded into the XML file for the person's RATSB incident and complete the missing information that is required in the XML file.
XML Preview	XML_PREVIEW_SEC	Click the *Preview XML* button on the Generation File page.	View a preview of the XML file for the Delta service or Contrata service before generating the XML file.

Defining the XML File

Access the Create Delt@ PAT/RAF Report ESP - Definition page or the Create Delt@ RATSB Report ESP - Definition page.

Copyright © 1988-2006, Oracle. All rights reserved.



Create Delt@ PAT/RAF Report ESP - Definition page

XML File ID When generating a new XML file, enter an identifier for the XML file generation upon entering the component. You use this identifier to confirm or un-confirm the sending of an XML file on the XML Confirm page.

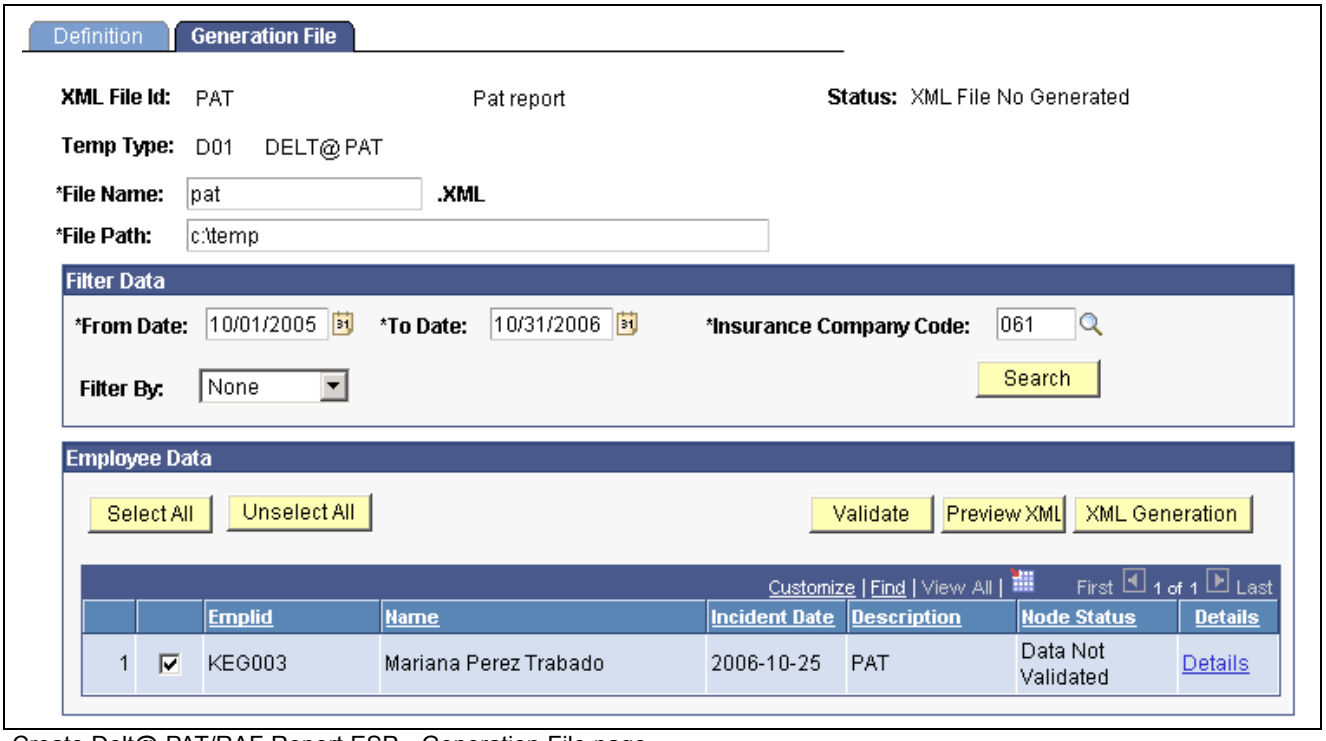
Description Enter a description of the XML file that you are generating.

Template Type Select the XML template that you want the XML file generation process to use when generating the XML file. The valid values that you can select depend on the component through which you are generating the XML file. You define XML templates on the XML Template Table page.

Valid options for Delta reporting are: DELT@ PAT, DELT@RATSB, and DELT@RAF.

Generating the XML File for Delta Reporting

Access the Create Delt@ PAT/RAF Report ESP - Generation File page.



Create Delt@ PAT/RAF Report ESP - Generation File page

Status Shows the status of the communication for the XML file. Possible values are:

Copyright © 1988-2006, Oracle. All rights reserved.

- *XML File No Generated:* The XML file has not yet been generated.
- *XML File Created:* The XML file has been generated. The system updates the field to this value when you generate the XML file or when you press the Confirm All button on the XML Confirm page.
- *XML File Sent and Confirmed:* The XML file has been sent and confirmed as sent. The system updates the field to this value when you press the Unconfirm All button on the XML Confirm page.

This is the same field that appears on the XML Confirm page. Upon saving your changes, the system reflects the new value on that page as well.

File Name Enter the name of the file that you want the process to use for the report. The system stores the data in a XML file.

File Path Enter the path where you want the process to store the report file.

Filter Data - PAT/RAF

Use this group box to search for persons who have been involved in an accident who need PAT/RAF Delta reports sent to management entities. Use the search criteria to narrow your search results.

From Date and **To Date** Enter a date range to search for persons within that timeframe who require XML file generation for Delta accident reporting.

Insurance Company Code Select the insurance company for which you are generating the XML file. Once you select the insurance company, other search criteria become available.

Filter By Use the filter by option to narrow your search results to a specific company, employee, or social security number. If you select one of these filter options, the system displays a grid for you to enter the additional search criteria.

Company and **Description** Select a specific company to search for persons within that company who require XML file generation for Delta accident reporting. The system displays the description of the company that you select.

EmplID (employee ID) and **Description** Select a specific employee to search for his or her accidents that require XML file generation for Delta accident reporting. The system displays the name of the employee that you select.

Company, Description, and **Social Security Number** Select a specific company and social security number to use to filter your search results. The system displays the name of the company that you select.

Search Press this button to search for persons who require XML file generation for Delta accident reporting based on your filter criteria.

Filter Data - RATSB

Use this group box to search for persons who have been involved in an accident who need RATSB Delta reports sent to management entities. Use the search criteria to narrow your search results.

Month Select the month for which you want to search for persons who require XML file generation for Delta accident reporting.

Year Select the year in which you want to search for persons who require XML file generation for Delta accident reporting.

Copyright © 1988-2006, Oracle. All rights reserved.

Company Select the company in which you want to search for persons who require XML file generation for Delta accident reporting.

Social Security Number Select the social security number of the person who requires XML file generation for Delta accident reporting.

Search Press this button to search for persons who require XML file generation for Delta accident reporting based on your filter criteria.

Employee Data

Use this group box to view the results of your search and select the persons to include in the XML file for Delta reporting.

Select All Press this button to select all rows in your search results. Otherwise, select the check box for each person that you want to include in the XML file.

Unselect All Press this button to clear the selection check box for all persons in the search results grid.

EmplID and **Name** The system displays the ID and name of the persons that meet your search criteria. For PAT/RAF incidents, select the check box for the persons that you want to include in the XML file.

Incident Date The system display the date of each incident, as defined on the Incident Details page.

Description The system displays whether the incident is a PAT or RAF.

Node Status The system automatically displays the status of data for each employee being reported. Possible values are:

- *Data OK:* The employee's data has been successfully included in the XML file but the XML file has not yet been sent and confirmed.
- *XML Sent Confirmed:* The employee's data has been successfully included in the XML file and there is confirmation that the XML file has been sent. You must use the XML Confirm page to update the XML file status to this value.
- *Required Data:* The employee's data has been included in the XML file but there is still data required for the employee before the XML file can be sent.
- *Not Validated:* The employee's data has been included in the XL file but not yet validated.

This is the same field that appears on the XML Confirm page. Upon saving your changes, the system reflects the new value on that page as well.

Details For PAT/RAF incidents, click this link to access the Create Delt@ PAT/RAF Report ESP - Details page, where you can view the data that the system has loaded for the person's incident and enter additional data for available fields.

For RATSB incidents, click this link to access the Create Delt@ RATSB Report ESP - Assignment Detail page, where you can maintain the data that the system has loaded for the person's incident.

Load Data Press this button to load contract data into the XML file for all of the selected persons. After you load data, this button converts to the Validate button and

Copyright © 1988-2006, Oracle. All rights reserved.

the Details link becomes available for each row of data that you included in the data load.

Validate

Press this button to have the system validate the existence of all of the required data for each person included in the XML file. The system displays the status of the validation in the Node Status field for each of the selected persons.

You must enter all required data and have a Node Status value of *Data OK* for all of the selected employees before you can generate the XML file. When you validate the required data, the Preview XML button becomes available. Once you have a node status of successful for all of the selected employees and save the page, the XML Generation button become available.

Note. You must save the page before generating an XML file.

Preview XML

Press this button to access the XML Preview page, where you can preview the XML file for the Delta service or Contrata service before generating the XML file. This button becomes available only after you load data into the XML file.

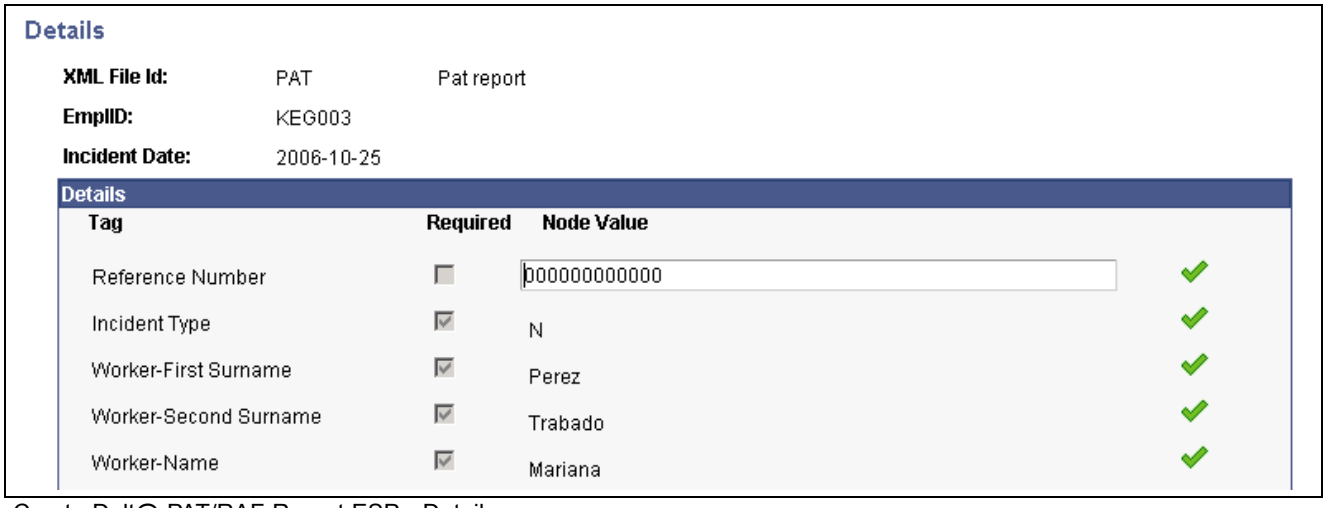
XML Generation

Press this button to generate the XML file for the selected persons. The system executes the XML file generation batch process, which creates the XML file based on the selected template ID. The batch process saves the XML file to the location that you specify in the run parameters. The batch process also updates the Status value and the XML File Created value for the XML file ID.

Provided that you have not confirmed the sending of the XML file on the XML Confirm page, you can change or add data and rerun the process as many times as necessary. The Status field shows whether the sending of the XML file is confirmed.

Viewing Employee Details for Delta Reporting

Access the Create Delt@ PAT/RAF Report ESP - Details page or the Create Delt@ RATSB Report ESP - Assignment Detail page.



Create Delt@ PAT/RAF Report ESP - Details page



Nodes that display this symbol are not required. They have no data but are available for optional data entry.

Copyright © 1988-2006, Oracle. All rights reserved.



Nodes that display this symbol have data that you entered manually or that the system retrieved from the database.



Nodes that display this symbol require a value but currently have no value entered. Enter the required data necessary to complete the report. Depending on the node definition, you must either enter a value directly through this page or go to the source page to enter the value.

Tag Tags are the node names as they appear in the XML file. The system retrieves tags based on the node definition as defined on the XML Node Table page.

Required Indicates whether the node is required for reporting.

Node Value The system displays the value for the corresponding tag. Enter or select additional data that you want to include in the report. You must provide node values for all required tags.

OK Press this button to save data and return to the previous page.

Cancel Press this button to cancel any changes that you have made and return to the previous page.

Refresh Click this button to refresh the data on the page.

Previewing XML Files

Access the XML Preview page.

Copyright © 1988-2006, Oracle. All rights reserved.



XML Preview page

See Also

Chapter 11, "(ESP) Managing Spanish Reporting," Previewing XML Files, page 432

Confirming the Sending of XML Files

This section discusses how to confirm XML files.

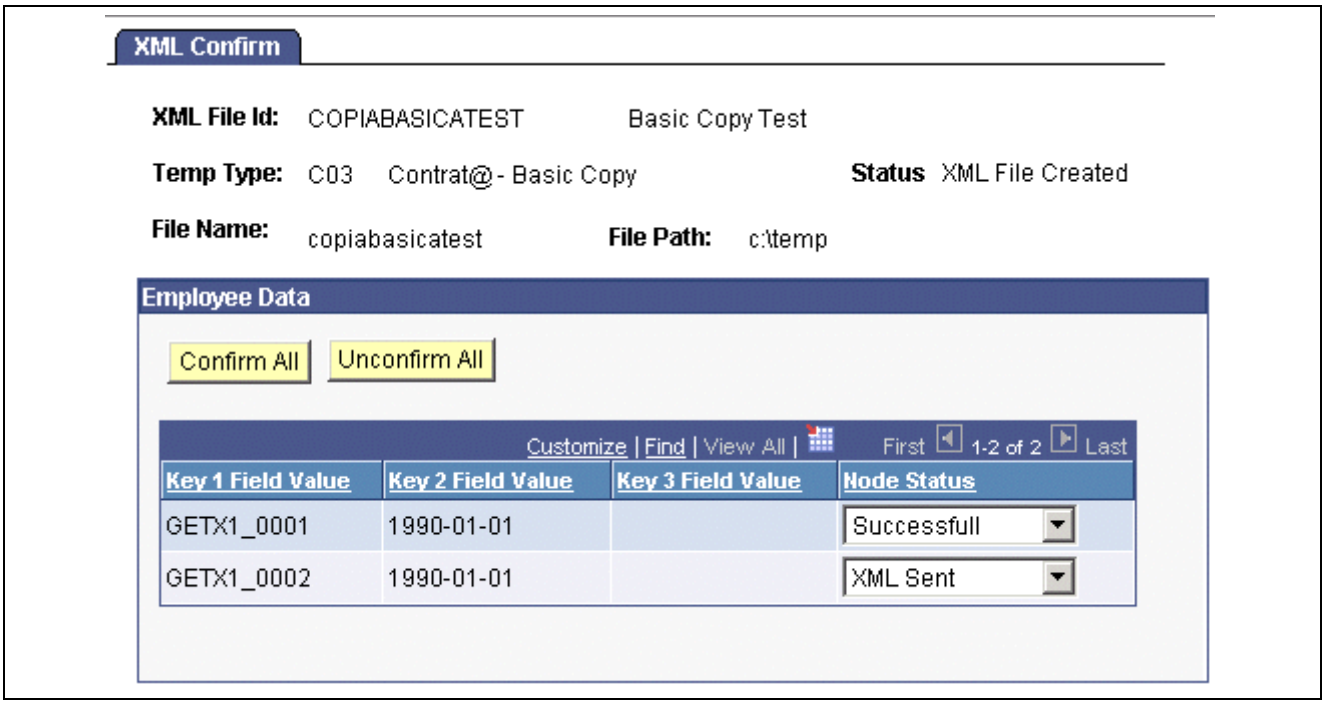
 Copyright © 1988-2006, Oracle. All rights reserved.

Page Used to Confirm the Sending of XML Files

Page Name	Object Name	Navigation	Usage
XML Confirm	XML_CONFIRM_ESP	Workforce Administration, Workforce Reports, XML File Confirmation ESP, XML Confirm	Confirm or unconfirm the sending of an XML file for persons based on XML file ID.

Confirming XML Files

Access the XML Confirm page.



XML Confirm page

XML File ID

Upon entering the component, search for the XML file ID for which you want to confirm of unconfirm the sending of the XML file for persons with data in the file. You define XML file IDs when you create XML files for generation.

Status

Shows the status of the communication for the XML file. Possible values are:

- *XML File No Generated:* The XML file has not yet been generated.
- *XML File Created:* The XML file has been generated. The system updates the field to this value when you generate the XML file on the Generation File page or when you press the Unconfirm All button.
- *XML File Sent and Confirmed:* The XML file has been sent and confirmed as sent. The system updates the field to this value when you press the Confirm All button.

This is the same field that appears on the Generation File page. Upon saving your changes, the system reflects the new value on that page as well.

Copyright © 1988-2006, Oracle. All rights reserved.

Note. To maintain data integrity between this component and the XML generation component, the system does not retrieve XML files with a communication status of XML File No Generated.

Key 1 Field Value, Key 2 Field Value and **Key 3 Field Value**

These fields indicate the key structure of the table from which the system retrieves data for reporting through XML files. You define the key structure of XML files using an XML template on the XML Template page.

Node Status

The system automatically displays the status of data for each employee being reported. Possible values are:

- *Data OK:* The employee's data has been successfully included in the XML file but the XML file has not yet been sent and confirmed.
- *XML Sent Confirmed:* The employee's data has been successfully included in the XML file and there is confirmation that the XML file has been sent.

For employees in the XML file whose data is already complete and validated, you can confirm or unconfirm the sending of the data. To confirm the sending of the XML file, select the *XML Sent Confirmed* value. To unconfirm the sending of the XML file, select the *Data OK* value. You must then save your changes.

This is the same field that appears on the Generation File page. Upon saving your changes, the system updates the values on that page as well.

Confirm All

Press this button to confirm the sending of the XML file for all employees in the file whose node status indicates that their data is validated and contains all required data. When you press this button, the system updates the Node Status value from *Data OK* to *XML Sent Confirmed* for all of these employees. The system also updates the Status field value to *XML File Sent and Confirmed.* After pressing this button, you must then save your changes.

Unconfirm All

Press this button to unconfirm the sending of the XML file for all employees in the file whose node status indicates that there data is validated and contains all required data. When you press this button, the system updates the Node Status value from *XML Sent Confirmed* to *Data OK* for all of these employees. The system also updates the Status field value to *XML File Created.* After pressing this button, you must then save your changes.

Printing Contracts

Printing contract functionality enables generating PDF reports corresponding to the contracts between the company and the employee.

Utilizing the flexible setup delivered to generate XML files to define the data structure of the PDF reports, the system uses the same pages to define the data of these reports by defining specific nodes.

This section provides overviews of contract printing, contract printing XML setup, and contract generation, and discusses how to:

- Map contract types to XML nodes.
- Create PDF form definitions.

 Copyright © 1988-2006, Oracle. All rights reserved.

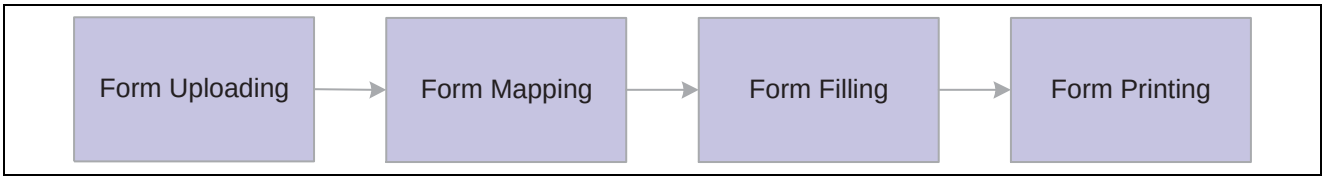
- Define PDF form details.
- Map PDF form fields to XML nodes.
- Generate and print contracts for employees.
- Review and edit contract data.
- Print contracts in batch.

Understanding Contract Printing

The Spanish government delivers a complete set of contract forms in PDF format that employers can download from the government website. The employer must complete the appropriate forms for new hires and submit them to the government after the newly hired employees sign the forms.

To assist employers in the completion of these contract forms, Human Resources for Spain provides Contract Printing functionality to load the forms into the system, map data to the form fields, enter data into the fields to complete the forms, and print the forms. Employers can then have employees sign the printed forms and return them to the Human Resources administrator, who can then submit the completed forms to the government.

There are four basic tasks involved in Contract Printing functionality:



Basic tasks for contract printing

System administrators must perform form uploading and form mapping tasks whenever there are new contract types that require contract-printing capability. Human Resources administrators perform the form filling and form printing tasks as necessary.

To set up the system for the printing of new contracts, system administrators must:

1. Define the XML nodes that relate to the contract form, including the node values and whether the nodes are mandatory, through the XML Node Table component.

   They can also create empty nodes to enable Human Resources administrators to edit the node data online before printing.
2. Map the form-level XML nodes to contract types through the Contract Printing Mapping component.
3. Create new PDF Form definitions through the PDF Form Definition component to:
   a. Upload PDF form files into the system.
   b. Map each form field to Human Resources data by assigning the field-level XML nodes to PDF form fields.
   c. Test PDF form fields.
   d. View the PDF form filled with XML tag names in a browser to ensure accuracy and completeness.

To generate and print contracts, Human Resources administrators must:

1. Select the employees that need the printed contracts through the Contract Printing ESP component.
2. Generate the contract data for the selected population through the Contract Printing ESP component.

   At runtime the XML generation process resolves the mapping of the form fields to the XML nodes, retrieving the values for the correct form fields according to the XML node setup and mapping.

Copyright © 1988-2006, Oracle. All rights reserved.

3. Review the contract data, complete any missing data, validate the data, and view the form through the same Contract Printing ESP component.

   The system uses the PDF Form process to read the form data and fill it into the appropriate form fields for viewing.

4. Print a single form through the Contract Printing ESP component or a batch of forms for a selected group of employees through the Print Contracts ESP component.

   They can then give the printed form to the employee for signature.

   The system uses the PDF Form process to read the form data and fill it into the appropriate form fields for printing.

Understanding Contract Printing XML Setup

Human Resources for Spain uses the XML generation process to retrieve the Human Resources data needed for completing the forms to print contracts, delivering all of the setup necessary to print contracts for unlimited contract types. System administrators can define additional data for the perform contract printing for other contract types.

Contract Printing XML Setup Structure

The setup for contract printing is based on:

- An XML set.

  Human Resources for Spain delivers the XML set *P01* for use with all contract printing.

  To maintain XML set definitions, use the XML Set Table component.

- XML nodes.

  XML nodes for contract printing are always keyed by the XML set for contract printing. Human Resources for Spain delivers the XML nodes for printing unlimited contracts.

  Specifically, Human Resources for Spain delivers the *PE-170* XML node for printing unlimited contracts and unlimited full-time contracts and the *PE-172* XML node for printing transformation to unlimited contracts. These nodes contain children nodes that correspond to each of the fields on the contract, and themselves are children nodes to the *P0 01* contract-printing root node.

  Human Resources for Spain also delivers the children nodes for PE-170 and PE-172 contracts.

  System administrators can maintain the delivered nodes and also define additional nodes for other contract types. To define nodes that comprise the XML file structure for contract printing of specific contract types, use the XML Node Table component.

- An XML template.

  The XML template for contract printing is keyed by the XML set for contract printing. Human Resources for Spain delivers the XML template for use with all contract printing. Human Resources for Spain delivers the XML template *P01* for use with all contract printing.

  To define templates for use during XML file generation, use the XML Template Table component.

- Contract print mapping.

 Copyright © 1988-2006, Oracle. All rights reserved.

Contract print mapping is the means of associating a contract type with XML templates and XML nodes. When you access the Contract Printing Mapping page the system automatically opens it for the delivered for the contract printing XML template. Use the page to link selected contract types to specific contract-level XML nodes. You are thus assigning a specific XML format to each contract type. You must assign a specific XML node to each contract type because each contract type could report different information. Human Resources for Spain delivers contract print mapping for unlimited contracts.

To map contract types to XML nodes for the contract-printing template, use the Contract Printing Mapping component.

Steps to Set Up New Contract Types for Contract Printing

To set up new contract types for contract printing, system administrators must:

- 1. Define one node for each piece of contract data that the system needs to retrieve from the Human Resources tables.
- 2. Create one contract-level node for each contract type, grouping the nodes for the contract data retrieval as children to this node.
- 3. Add the contract-level node as a child node to root node P0 01 because the XML generation process uses this root node for all contract types when retrieving data for contract printing.
- 4. Map each contract-level node to the appropriate contract type on the Contract Printing Mapping page.

See Also

Chapter 11, "(ESP) Managing Spanish Reporting," Setting Up XML Files, page 411

Understanding Contract Generation

Human Resources administrators can use the Contract Printing ESP component to generate, review, edit, and validate contract data.

To create contracts:

1. Access the Contract Printing page for a specific Contract Printing Run ID.
2. Enter criteria to search employees for whom you want to generate contracts.
3. Click the Search button to retrieve the applicable employees.

   The system displays the search results in the Employee Data grid.
4. Select from the listed employees the ones for whom you want to generate contract data.
5. Click the Generate Data button to launch the XML Application Engine process that retrieves contract data for the selected employees.

   The system displays a message informing that you have successfully launched a batch process to generate the contract data for the selected employees. Make note of the process instance.
6. To view the status of the batch process in PeopleTools Process Scheduler, click the Yes button.

   The system launches a new browser window and displays the Process List page of the Process Monitor component. Verify that for your process instance the Run Status equals *Success*.

   Or, to simply return to the Contract Printing Data page, click the No button.
7. Click the Edit Data button on the Contract Printing page for a specific employee to access the Contract Printing Data page, where you can review the generated contract data and enter missing data into the contract fields.

Copyright © 1988-2006, Oracle. All rights reserved.

8. Click OK to return to the Contract Printing page.
9. Click the Print button on the Contract Printing page to have the PDF Form engine fill data into the PDF Form fields and print a PDF file of the contract.

   The system immediately launches another window to display the contract as a PDF file.

Note. To print contracts for the entire population, use the Print Contracts ESP component.

See Also

Chapter 11, "(ESP) Managing Spanish Reporting," Running the Batch Contract Printing Process, page 463

 Copyright © 1988-2006, Oracle. All rights reserved.

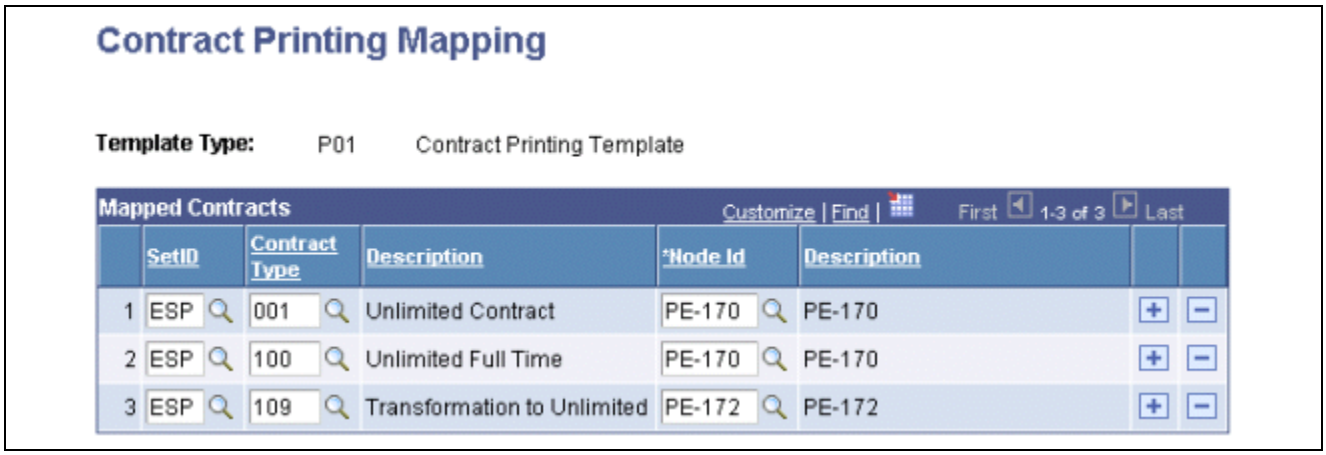
Page Used To Print Contracts

Page Name	Object Name	Navigation	Usage
Contract Printing Mapping	CTPR_MAPPING_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, Contract Printing Mapping, Contract Printing Mapping	Map contract types to XML nodes for the contract-printing template.
PDF Form Definition	FM_DEF_ESP	Set Up HRMS, Product Related, Workforce Administration, Workforce Data ESP, PDF Form Definition, PDF Form Definition	Attach PDF versions of contracts for each language to store these forms in the system for use during contract printing. Add, delete, or view forms as necessary.
Form Details	FM_FORM_ESP	Click the Details button on the PDF Form Definition page.	Set up the interaction of the PDF version of the contract form with the database.
Node Selection	FM_FORM_ESP	Click the Select XML Node button on the PDF Form Definition page.	Map PDF form fields to a specific XML node within the specified root node.
Contract Printing	CTPR_CRET_XML2_ESP	Workforce Administration, Workforce Reports, Contract Printing ESP, Contract Printing	Generate contract data into XML nodes and print individual contracts.
Contract Printing Data	CTPR_XML_LVL2_ESP	Workforce Administration, Workforce Reports, Contract Printing ESP, Contract Printing Click the Edit Data link.	Review and edit, through the XML nodes, the contract data that the system retrieves for a specific contract. Complete all required XML nodes and click OK to automatically validate the contract data.
Print Contracts	CTPR_RC_ESP	Workforce Administration, Workforce Reports, Print Contracts ESP, Print Contracts	Print contracts in batch for employees that are grouped within a specified Contract Printing Run ID.

Mapping Contract Types to XML Nodes

Access the Contract Printing Mapping page.

Copyright © 1988-2006, Oracle. All rights reserved.



Contract Printing Mapping page

Human Resources for Spain delivers contract printing mapping for unlimited contracts.

Template ID — You can access this page for templates that you have already defined. Define templates on the XML Template page.

SetID — Select the setID of the contract type. The system selects *ESP* by default.

Contract Type and **Description** — Select the contract type for which you want to specify the starting node. The system prompts you to select from contract types that are defined for the selected setID.

The system displays the description of the selected contract type.

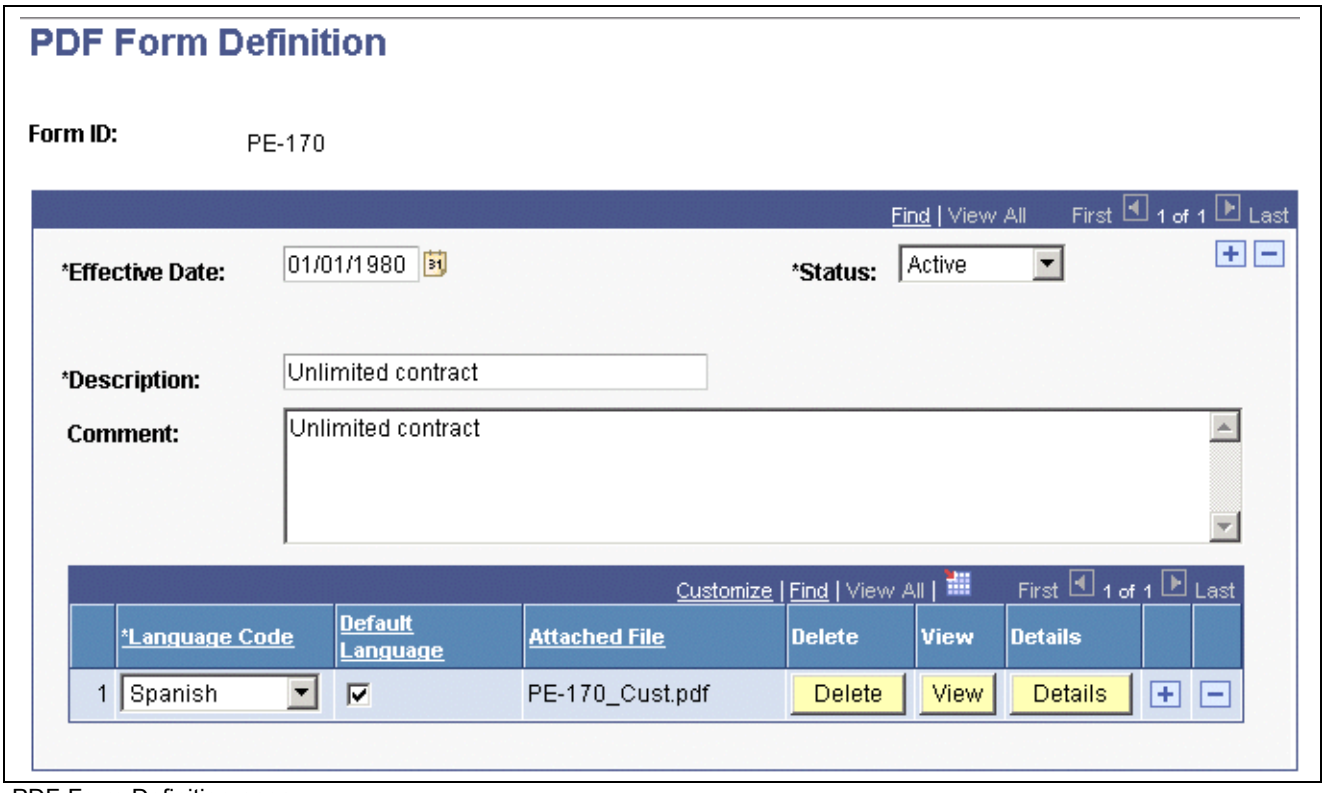
Node ID and **Description** — Select the contract-printing node to which you want to map the specified contract type. By associating this node to each contract type, you are defining an XML structure that contains the data structure for the contract type. You can report each contract type with a different XML file format and structure.

The system displays the description of the selected node.

Creating PDF Form Definitions

Access the PDF Form Definition page.

Copyright © 1988-2006, Oracle. All rights reserved.



PDF Form Definition page

Form ID The ID of the PDF form definition.

Effective Date Enter the date that the PDF form definition becomes valid and its effective status, either *Active* or *Inactive*.

Description Enter a description of the PDF form definition.

Comment Enter any additional comments about the PDF form definition or the contract form that it represents.

Language Code Select the language for the PDF form that you are attaching. If you have the same contract form in multiple languages, you must specify a row for and attach a form for each language.

Default Language Select this check box for a row to indicate that the system should use the corresponding language whenever there are contract forms missing for a specific language. You must select a default language.

Attached File The system displays the file name of the attached contract form.

Add Click this button to attach the PDF file of the contract form to upload the form into the system. If you have the same contract form in multiple languages, you must specify a row for and attach a form for each language.

Delete Click this button to remove the attached form from the PDF form definition.

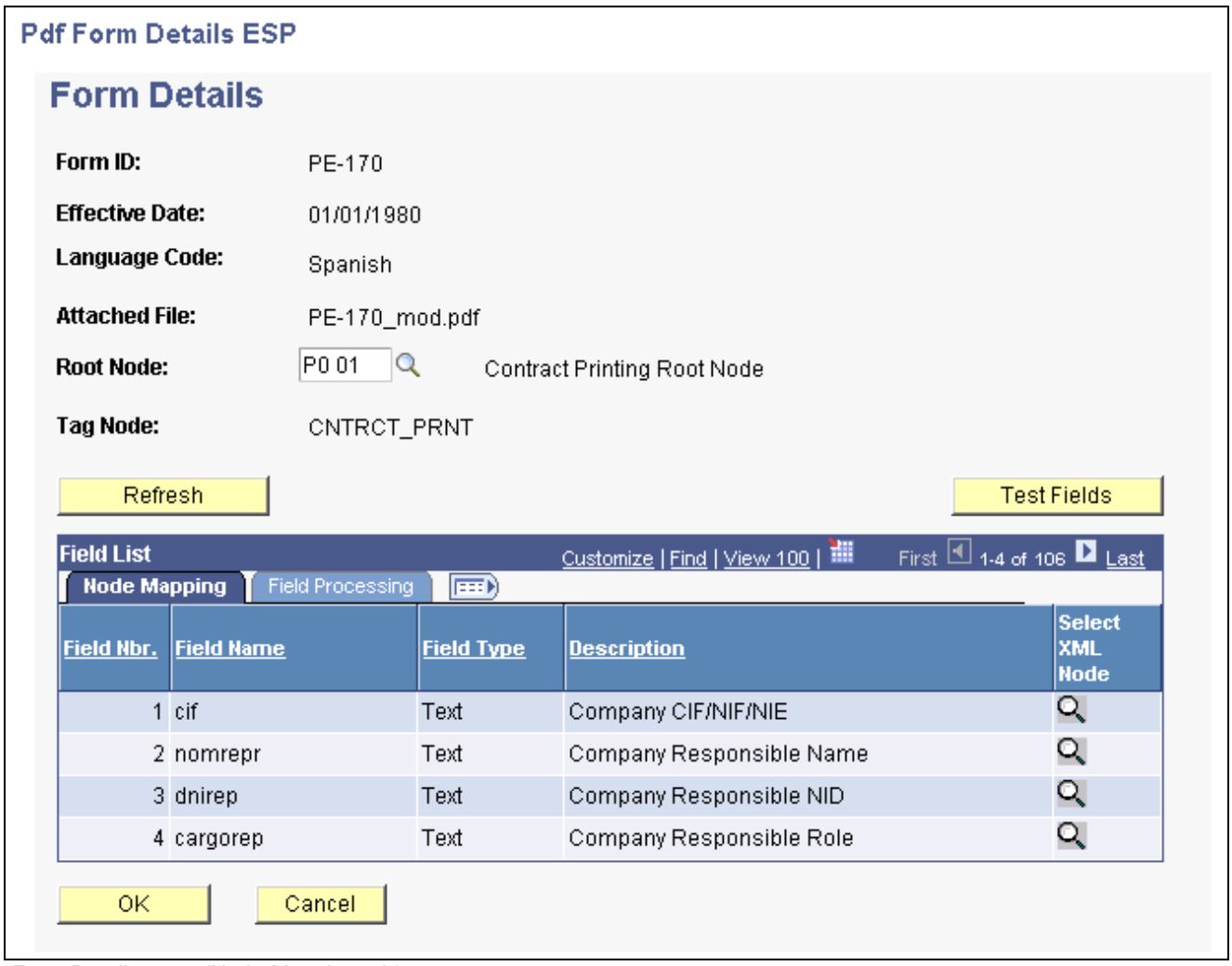
View Click this button to access the view the attached PDF form file. The system launches another window to display the form.

Details Click this button to access the Form Details page, where you can define the fields and processing details for the attached PDF form.

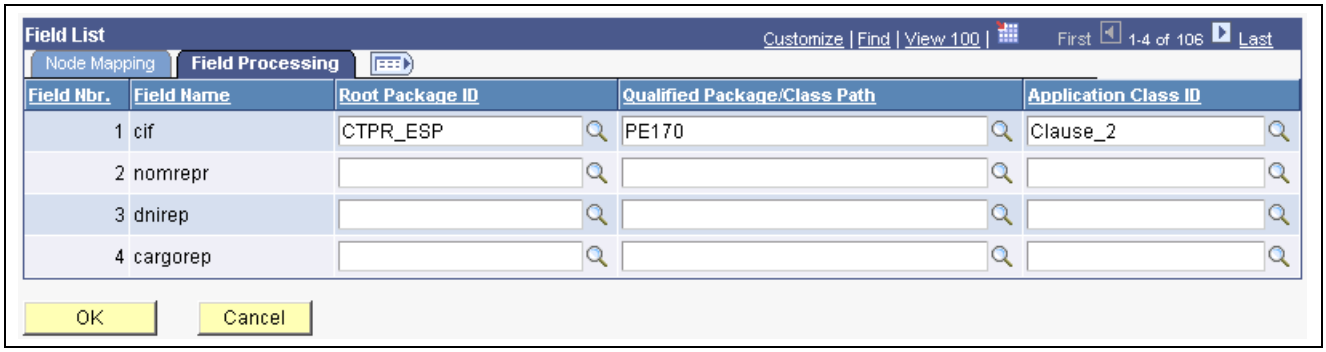
Copyright © 1988-2006, Oracle. All rights reserved.

Defining PDF Form Details

Access the Form Details page.



Form Details page (Node Mapping tab)



Form Details page (Field Processing tab)

Root Node Select the root XML node to use for mapping the PDF form fields to specific XML nodes within the root node. When printing contracts, the system uses this root node to complete the fields of the PDF according to the mapping

Copyright © 1988-2006, Oracle. All rights reserved.

that you define. Human Resources for Spain delivers the *P0 01* root node for contract printing.

Refresh Click this button to refresh the list of PDF form fields that that the system displays in the Field List grid. The system reads the attached PDF form and displays all of its fields in the grid.

Test Fields Click this button to view a copy of the form in which each field on the form displays the technical Field Name value. System administrators can use this feature to locate the form field name on the PDF form.

Field List - Node Mapping Tab

Use the fields on this tab to view a list of the fields that appear on the attached PDF form and to map each of these fields to an XML node.

Field Nbr. (field number) The ID associated with the PDF form field, as determined by Adobe Acrobat specifications.

Field Name The name of the field as it appears on the PDF form.

Field Type The type of PDF form field: *Text, Checkbox,* or *Button.*

Description The system displays a description of the node that you have mapped to the PDF form field through the Node Selection page. If you have no yet mapped the PDF form field to an XML node, this field is blank.

Select XML Node Click this button to access the Node Selection page, where you can map a node to the PDF form field.

Field List - Field Processing Tab

Due to their complexity certain PDF form fields require formatting. Use the fields on this tab to link application classes to complex PDF form fields. The application classes perform this required formatting. The PDF Form engine executes all application classes of this type at runtime to format the data that the system retrieves from the XML nodes.

Root Package ID Select the application class package that contains the application class for the formatting of the PDF form field.

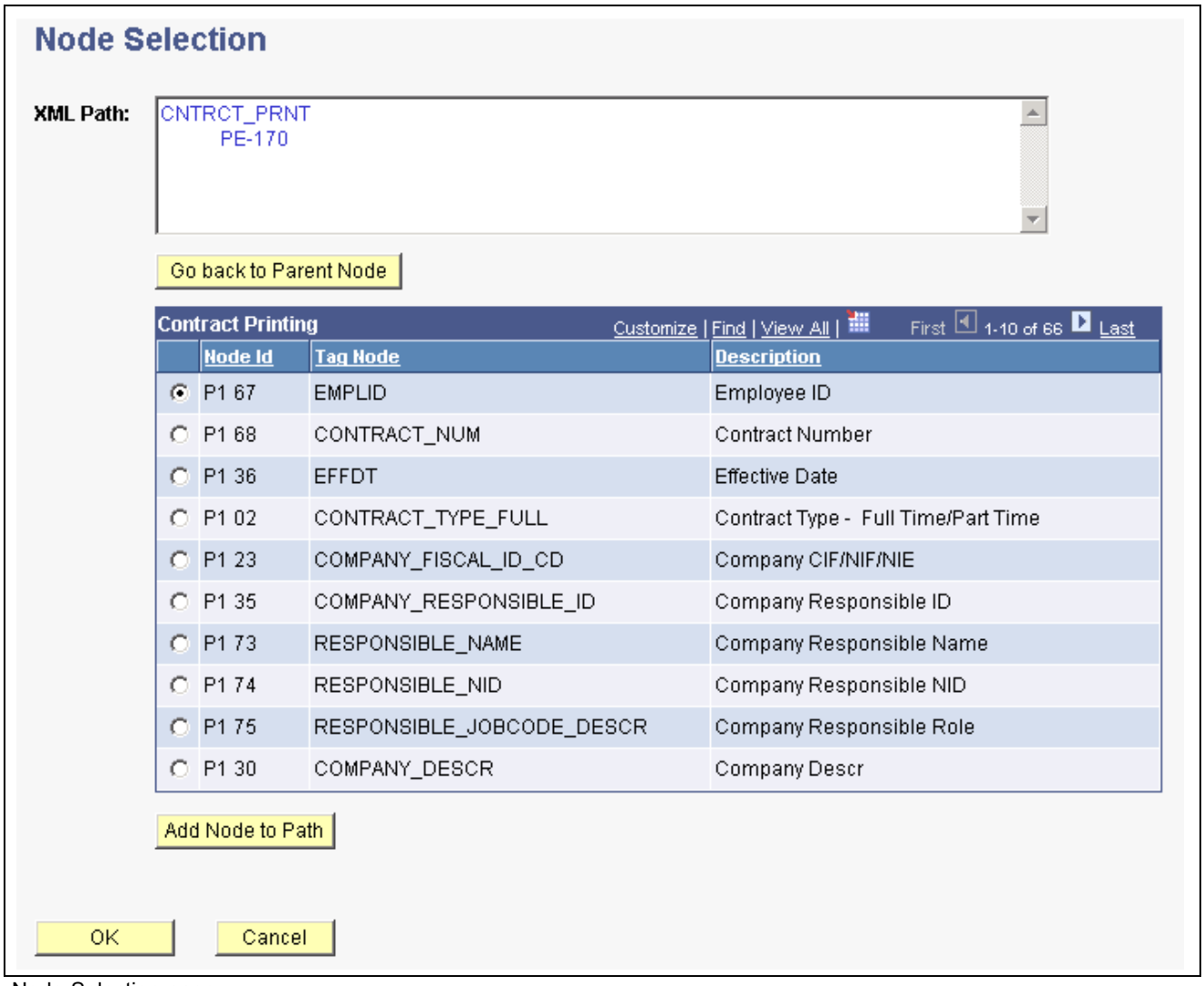
Qualified Package/Class Path Select the application class path that you want to use for the formatting of the PDF form field.

Application Class ID Select the application class that you want to use for the formatting of the PDF form field. The application class must exist in the root package that you specify.

Mapping PDF Form Fields to XML Nodes

Access the Node Selection page.

Copyright © 1988-2006, Oracle. All rights reserved.



Node Selection page

XML Path The system displays the path of the currently selected XML node as it appears within the context of XML tags. When selecting an XML node for the first time, the system displays the children nodes of the root node specified on the Form Details page.

Go back to Parent Node Click this button to remove the last child-level XML node from the XML Path display box. The system repopulates the Child Nodes grid with the child nodes of the parent node.

Contract Printing

Node ID, Tag Node, and **Description** If applicable, the system displays the XML node ID, tag, and description for each child node of the lowest-level node that appears in the XML Path display box.

Select the XML node to child you want to map the PDF form field.

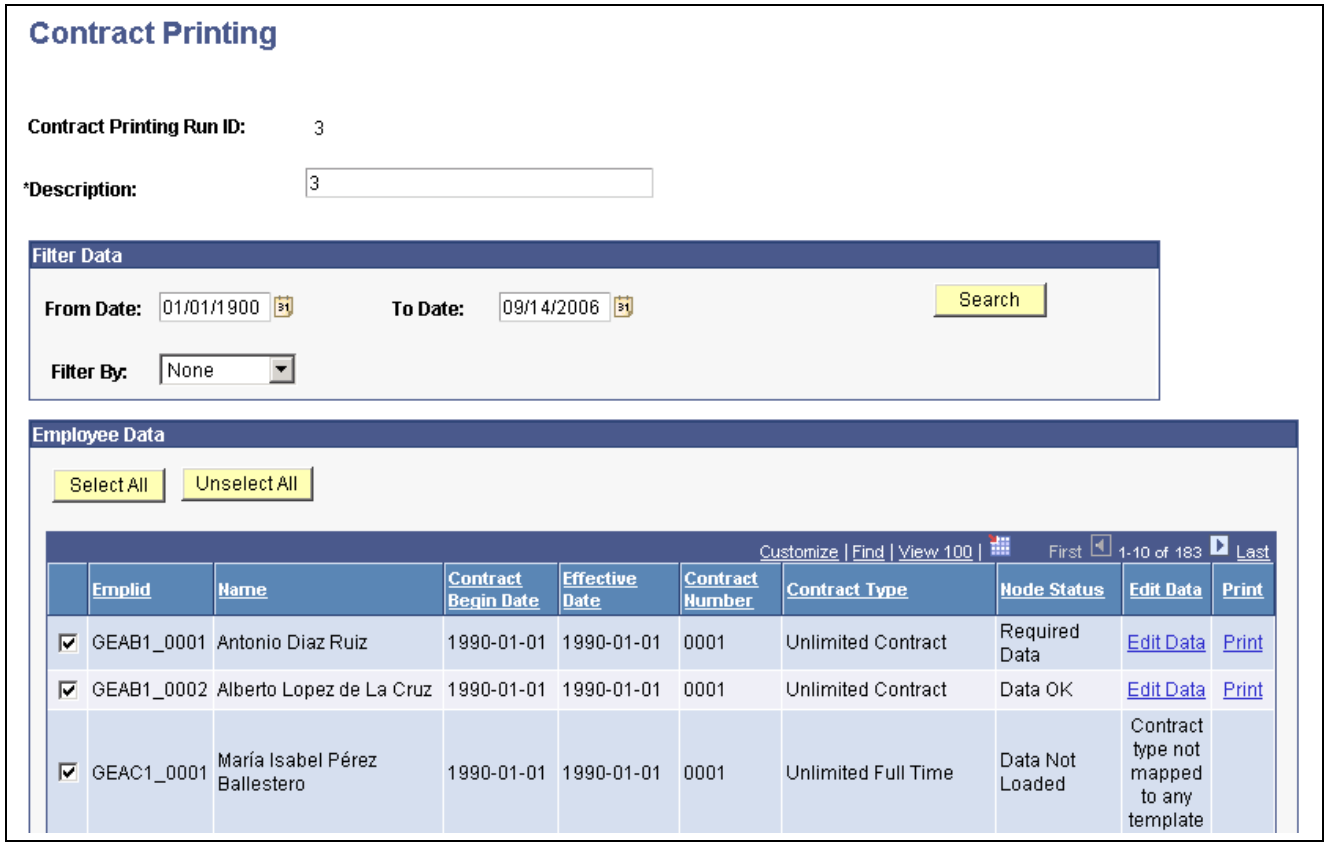
Add Node to Path Click this button to add the selected child-level XML node to the XML Path display box. The system repopulates the Child Nodes grid with the child nodes of the selected node.

Copyright © 1988-2006, Oracle. All rights reserved.

Note. The system requires the full path to the XML node because the same node can appear in multiple path locations.

Generating and Printing Contracts for Employees

Access the Contract Printing page.



Contract Printing page

Contract Printing Run ID Upon entering the component, select or create a Contract Printing Run ID. This ID enables you to group selected employees for whom you want to generate and print contracts.

Description Enter a description for the Contract Printing Run ID.

Filter Data

Use this group box to search for persons who have contracts that you need to generate and print. Use the search criteria to narrow your search results.

From Date and **To Date** Enter the date range to search for persons within that timeframe who require contract generation and printing.

Filter By Use the filter by option to narrow your search results to a specific social security number (*CCC*), *Company,* or *Employee.* If you select one of these filter options, the system displays a grid for you to enter the additional search criteria.

Copyright © 1988-2006, Oracle. All rights reserved.

Company, Description, and **Social Security Number** — Select a specific company and social security number to filter your search results to based on social security number. The system displays the name of the company that you select.

Company and **Description** — Select a specific company to search for persons within that company for whom you want to generate and print contracts. The system displays the description of the company that you select.

EmplID (employee ID) and **Name** — Select a specific employee to generate and print contracts. The system displays the name of the employee that you select.

Note. You can include the same contract within multiple Contract Printing Run IDs.

Search — Press this button to search for persons who require contract generation and printing based on your filter criteria.

Employee Data

Use this group box to view the results of your search and select the persons for whom you want to generate and print contracts.

Select All — Press this button to select all rows in your search results. Otherwise, select the check box for each employee for whom you want to generate contract data.

Unselect All — Press this button to clear the selection check box for all persons in the search results grid.

Emplid (employee ID) and **Name** — The system displays the ID and name of the employees that meet your search criteria. Select the check box for employees for whom you want to generate contract data.

Contract Begin Date — The system displays the employee's contract begin date as defined on the Contract Status/Content of the Update Contracts component.

Effective Date — The system displays the date when the contract type is associated with the employee. You associate contract types with employees through the Contract Type/Clauses page of the Update Contracts component.

Contract Number — The system displays the employee's contract number as defined through the Update Contracts component.

Contract Type — The system displays the type of legal contract associated with the employee. You associate contract types with employees through the Contract Type/Clauses page of the Update Contracts component.

Node Status — The system displays the status of contract data generation for each employee. Possible values are:

- *Data OK:* The system has successfully generated the employees contract data and there is no additional data required.
- *Data Not Loaded:* An error occurred during the contract data generation for this employee. The system has not loaded the data. View the details of the node status in the Details column of the grid.
- *Required Data:* The employee's data has been included in the contract generation but there is still data required for the employee.

Copyright © 1988-2006, Oracle. All rights reserved.

Child Nodes, Details, and **Edit Data**

If the system successfully loads the contract data for the employee it displays an Edit Data link in the Child Nodes column. Click this link to for a specific employee to access the Contract Printing Data page, where you can review, edit, and complete contract data for that employee.

If the node status is *Data Not Loaded,* the system displays a description of the problem that caused the failure to generate the contract data for the employee.

Print

Click this link for a specific employee to print the contract for that employee or to review the final contract that you can generate through the Print Contracts page as part of a batch of contracts. The system immediately launches another window to display the contract as a PDF file. The PDF Form engine fills data into the PDF Form fields so that you can print the contract.

Note. To print contracts for the entire population, use the Print Contracts ESP component.

Generate Data

Click this button to retrieve contract data for the selected employees. The system executes the Contract Printing Data Generation (CTPR_GEN_ESP) Application Engine process to retrieve contract data and to store that data in a table with a metadata XML format (XML_FILE_TBL).

Upon completion, the system displays a message informing that you have successfully launched a batch process to generate the contract data for the selected employees.

Select whether to view the run status of the process instance in the Process Monitor component.

Return to the Contract Printing page to view and refresh node statuses.

Refresh Node Status

Click this button to refresh the Node Status value for the employees listed in the Employee Data grid. When the run the Contract Printing Data Generation process, the system makes the new node statuses available for viewing on this page when the run status of the process instance equals Success.

If there are errors for a particular employees contract data generation, the Node Status value remains *Data Not Loaded.*

If the employee's contract data generation is successful but missing required data, the system updates the Node Status to *Required Data.* Click the Edit Data link to access the Contract Printing Data page and enter the required data.

If the employee's contract data is complete, the system updates the Node Status to *Data OK*.

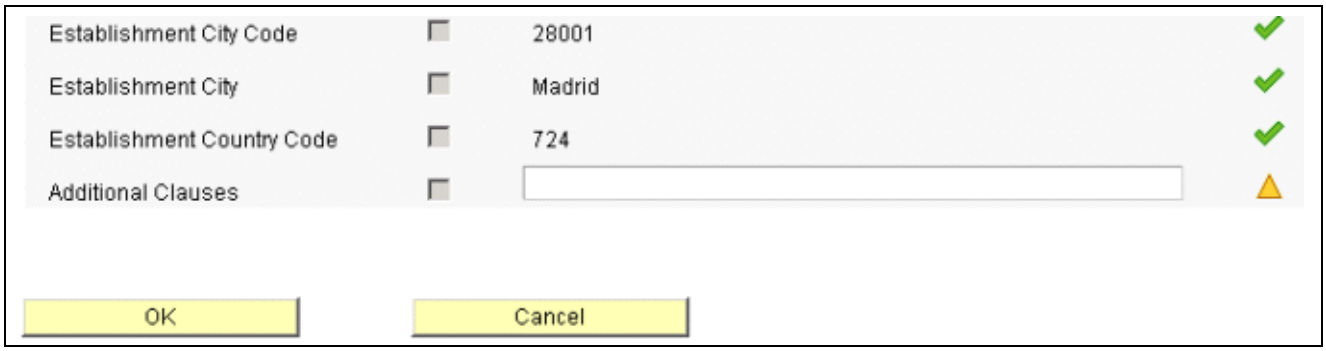
Reviewing and Editing Contract Data

Access the Contract Printing Data page.

Copyright © 1988-2006, Oracle. All rights reserved.



Contract Printing Data page (1 of 2)



Contract Printing Data page (2 of 2)

Remove All Rows If you want to recalculate the field values for the selected employee's contract, click this button to delete all data rows that the system generated. The system displays a blank page.

Click OK to accept this deletion or click Cancel to reject the deletion and return to the previous page.



Nodes that display this symbol are not required. They have no data but are available for optional data entry.



Nodes that display this symbol have data that you entered manually or that the system retrieved from the database. This data is validated.



Nodes that display this symbol require a value but currently have no value entered. Enter the required data necessary to complete the contract. Depending on the node definition, you must either enter a value directly through this page or go to the source page to enter the value.

Tag Tags are the node names as they appear in the XML file that is used to generate the contract. The system retrieves tags based on the node definition as defined on the XML Node Table page.

Required Indicates whether the node is required for reporting.

Copyright © 1988-2006, Oracle. All rights reserved.

Node Value The system displays the value for the corresponding tag. Enter or select additional data that you want to include in the report. You must provide node values for all required tags.

OK Press this button to save data and return to the previous page.

Cancel Press this button to cancel any changes that you have made and return to the previous page.

See Also

PeopleSoft Customer Connection, PeopleSoft Enterprise Human Resources 8.9: Product Enhancements for Spain, Setting Up XML Files

Running the Batch Contract Printing Process

Access the Print Contracts page.



Print Contracts page

Language Select the language in which you want to print the contract. The system by default selects Spanish.

Contract Printing Run ID and **Description** Select the Contract Printing Run ID for which you want to print contracts. Define these IDs through the Contract Printing component.

Validated Contracts Only Select this check box to print only the contracts that you have validated through the Contract Printing component. With this option the process generates only the contracts a Node Status value of *Data OK* on the Contract Printing page.

Run Click this button to run the Contract Printing Report (CTPR_REP_ESP) Application Engine process. The process generates contracts in PDF format that are part of the specified Contract Printing Run IDs.

Note. You can run this process for a given Contract Printing Run ID as many times as necessary.

Generating AFI Flat Files

This section provides an overview of the AFI process and discusses how to:

Copyright © 1988-2006, Oracle. All rights reserved.

- Maintain employee AFI data.
- Maintain detailed AFI data for employees.
- Create the AFI report.
- Create employee inquiries on the AFI report.
- Create company inquiries on the AFI report.
- Review employee data on AFI files.

Understanding the AFI Process

For Spanish employers, PeopleSoft Enterprise Human Resources includes an AFI process (SOCS_AFI_ESP) for reporting workforce changes to the Social Security General Treasury. The PeopleSoft process simplifies submissions by automatically creating a flat file in the format that is required by the Spanish authorities.

Every time you add, delete, or update an effective-dated row to the JOB_DATA record, the system verifies whether the action pertains to AFI reporting. If so, the system adds, deletes, or updates the corresponding effective-dated row in the AFI_DATA_ESP record via PeopleTools Integration Broker. The system uses the ESPAFIData_Sync message subscription within the WORKFORCE_SYNC message to perform the synchronization. The system stores all AFI data in the AFI_DATA_ESP record.

After an AFI-related action takes place, you can access the Employee AFI Data ESP component to view and update AFI data for that employee. You can also use this component to manually enter new rows of data for special situations not handled by job data processing, such as strikes or contract changes.

When ready you can run the AFI process through the Create AFI Report ESP component. The AFI process generates a flat file that lists changes in workforce—such as hiring, terminations, personal changes, or job data changes—for a particular period. The system ensures that employees for whom you have already generated the report are not included in subsequent file generations.

In addition to workforce changes, you can use the AFI process to send information requests to the Social Security General Treasury. Employers use these requests to obtain information about their employees' or companies' social security contributions.

When you generate an AFI report through the AFI file generation process, the system assigns an AFI file name to each row of employee AFI data that it includes in the file. The assignment of this value prevents repeat communication of the data in subsequent AFI files. The system also assigns to the communicated row of data a node status value of *Included in AFI* and a time stamp value that specifies the date and time of the processing.

You can use the Review AFI File ESP component to view all of the employee AFI data that is part of the AFI flat file being communicated to the Social Security General Treasury. Through this component you can also unlink data from the files as necessary so that the data becomes available again for processing in a subsequent AFI flat file. The system removes the AFI Flat File field value from the unlinked row to enable repeat communication of the data, although the employee data is not extracted from the file itself.

Note. To use AFI reporting functionality you must configure PeopleTools Integration Broker to support Integration Broker.

Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Generate AFI Flat Files

Page Name	Object Name	Navigation	Usage
Employee AFI Data	AFI_DATA_ESP	Workforce Administration, Job Information, Employee AFI Data ESP, Employee AFI Data	View and update AFI data for employees. You can also manually enter new rows of AFI data for special situations not handled by job data processing.
AFI Data Details	AFI_DATA_ESP_SEC	Click the Details link on the Employee AFI Data page.	Review and update the employee AFI data to include in the AFI report. You need only enter data for the fields that you need to report to social security.
Create AFI File ESP - Employees	AFI_RC_1_ESP	Workforce Administration, Workforce Reports, Create AFI File ESP, Employees	Search for employees for which you need to communicate AFI data to social security, and then generate the AFI flat file for selected employees.
Create AFI File ESP - Employee Inqueries	AFI_RC_2_ESP	Workforce Administration, Workforce Reports, Create AFI File ESP, Employee Inquires	Create inquiries to submit to the Social Security General Treasury about selected employees. The AFI report process includes these inquiries in the AFI flat file that it generates.
Create AFI File ESP - Company Inqueries	AFI_RC_3_ESP	Workforce Administration, Workforce Reports, Create AFI File ESP, Company Inquires	Create inquiries to submit to the Social Security General Treasury about selected companies. The AFI report process includes these inquiries in the AFI flat file that it generates.
Review AFI Files	AFI_CONFIRM_ESP	Workforce Administration, Workforce Reports, Review AFI File ESP, Review AFI Files	View the list of employees that are part of the AFI flat file being communicated to the Social Security General Treasury and, if necessary, unlink data for employees that have been mistakenly included in the file so that their data is available for AFI flat file generation again.

Maintaining Employee AFI Data

Access the Employee AFI Data page.

Copyright © 1988-2006, Oracle. All rights reserved.



Employee AFI Data page

Job Information - General Tab

Eff Date (effective date) The system displays the effective date of the job data row that contains the AFI-related action. If you are adding a row, enter the effective date of the AFI social security action.

Seq (sequence number) The system displays the sequence number of the effective-dated row from the record where the social security action occurred. If you are adding a row, enter the sequence number.

Social Security Action The system displays the social security action that caused the creation of the AFI data. The system automatically generates rows of AFI data for job data actions that relate to AFI reporting. If you are manually adding a new row, select the action. Possible values are:

- *Change in Contract:* Change in the employee's contract data.
- *Change in Risk Code:* Change of the social security risk code on the Job Information page.
- *Change in Work Group:* Change in the social security work group value on the Labor Agreement Categories page.
- *Erase Consolidated Hiring:* Select if you have communicated a hire to social security by mistake and are requesting to social security to remove the communicated hire from their system.
- *Erase Consolidated Term:* Select if you have communicated a termination to social security by mistake and are requesting to social security to remove the communicated termination from their system.
- *Erase Like-Active Period:* Select if you have communicated a like-active period to social security by mistake and are requesting to social security to remove the communicated like-active period from their system.
- *Erase Previous Data:* Select if you have communicated data to social security by mistake and are requesting to social security to remove the previously communicated data from their system.
- *Hire:* New hire or modification of a previous hire through the job data components.
- *Like-Active Communication:* The employee is no longer active in the company but still has social security contributions. Employees can have a

Copyright © 1988-2006, Oracle. All rights reserved.

like-active situation when they have a PTO balance paid at termination or when they are the victim of domestic violence.

- *Termination:* Employee termination through the job data components.

Social Security Reason The system displays the employee status for the social security action. If you are adding a new row, select the status from the list of available choices based on the selected social security action.

Node Status The system displays the communication status for reporting the employee's AFI data. Possible values are:

- *Included in AFI:* The row of AFI data has been included in an AFI file. The system displays the AFI file name on the Reporting tab.
- *Not Communicated:* The row of AFI data has not been communicated to social security.

Job Information - Reporting Tab

Via The system displays whether you are communicating the selected row of AFI data for the employee by entering the data online through the social security website or by generating an AFI flat file that includes the data. This field corresponds directly to the Communicated By field on the Employee AFI Data - Details page.

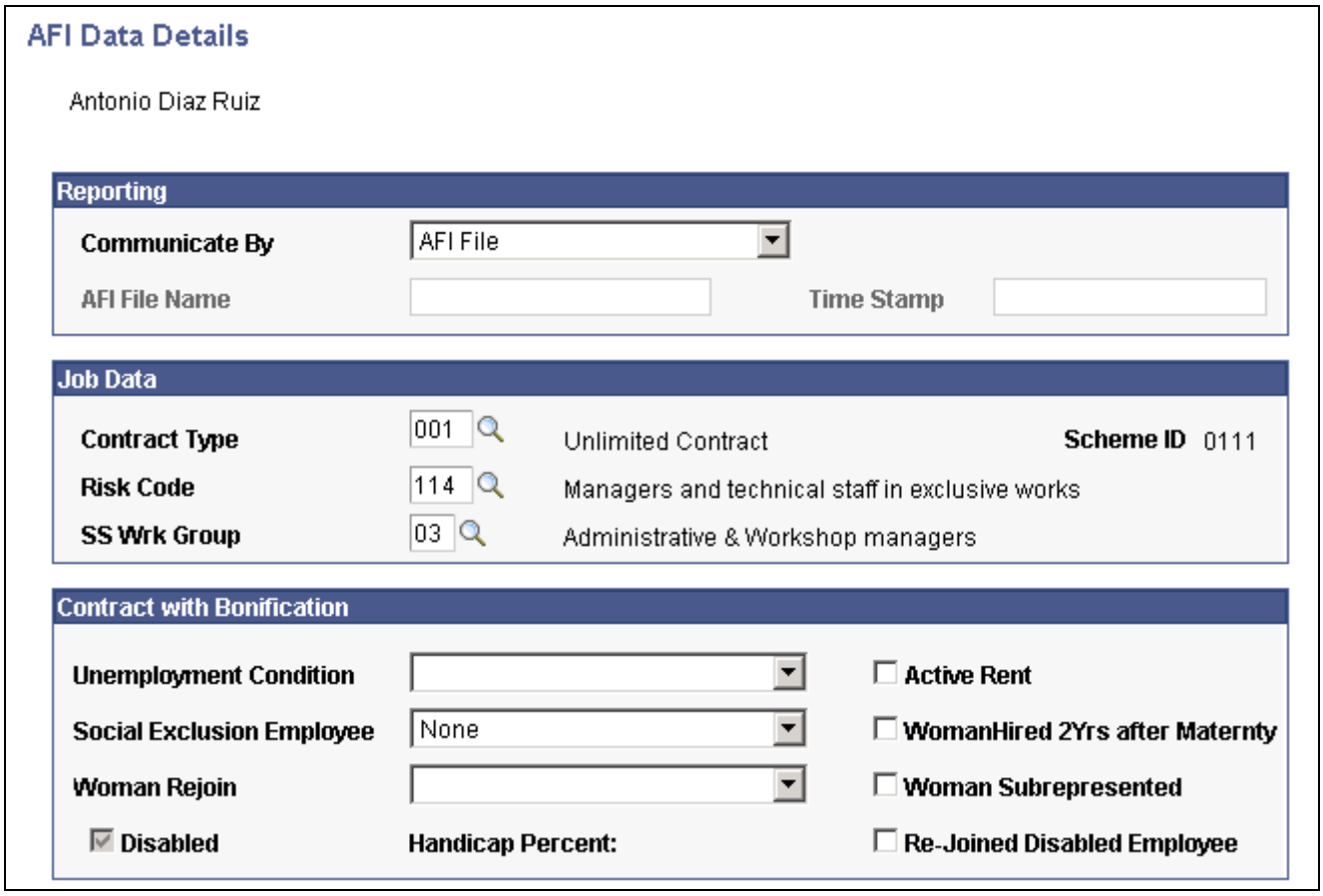
AFI File Name The system displays the name of the AFI flat file that includes the employee AFI data for the selected row. This field is the same as the AFI File Name field on the Employee AFI Data - Details page.

Time Stamp The system displays the time and date when the row of AFI data for the employee was processed.

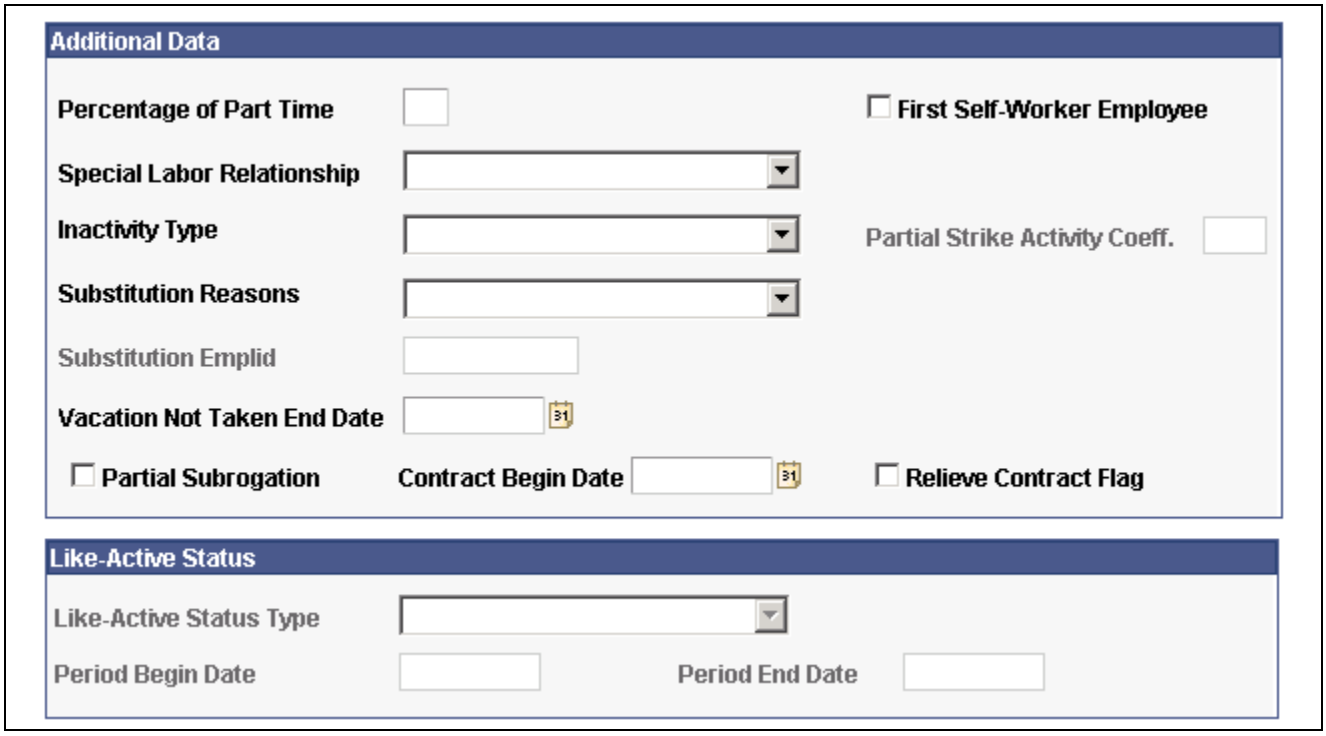
Maintaining Detailed AFI Data for Employees

Access the AFI Data Details page.

Copyright © 1988-2006, Oracle. All rights reserved.



AFI Data Details page (1 of 2)



AFI Data Details page (2 of 2)

Copyright © 1988-2006, Oracle. All rights reserved.

Reporting

Use this group box to specify reporting details about the AFI data.

Communicate By Select whether you are communicating the selected row of AFI data for the employee by entering the data online through the social security website or by generating an AFI file that includes the data. By default the system select the AFI File value. Note that you should also select the online value if you do not want the employee AFI data to be eligible for communication through the AFI file generation process.

AFI File Name If you have already processed the row of AFI data for the employee in an AFI file, the system displays the name of that file. Otherwise, the field remains blank. Having a value in this field ensures that the AFI file generation process does not include this data in other AFI files that you generate. You can liberate this data row from the AFI flat file, and thus make the data available again for inclusion in an AFI flat file, by unlinking the data row from the AFI file name through the Review AFI Files page.

Time Stamp For AFI data communicated by AFI file, the system displays the time and date of the AFI flat file generation. For AFI data communicated online, the system displays the system time and date, which you can modify.

Job Data

Use this group box to specify job data to include in the AFI report.

Contract Type The system displays the employee's contract type.

Scheme ID The system displays the scheme ID for the employee's contract.

Risk Code The system displays the employee's social security risk code.

SS Work Group The system displays the employee's social security work group.

Contract with Bonification

Use this group box to specify contract data to include in the AFI report.

Unemployment Condition Select the value that you want the AFI report to contain.

Active Rent Select to indicate that the worker has an official certificate and meets the conditions that are required to sign the specific kind of contract.

Social Exclusion Employee Select the value that you want the AFI report to contain.

Woman Hired 2Yrs After Maternity Select to indicate the worker is a woman who has been hired 2 years after maternity took place.

Woman Rejoin Select to indicate that the worker is a woman who has rejoined the company after a maternity period.

Woman Subrepresented Select to indicate that the worker is a woman hired in a company or sector where women are underrepresented.

Disabled The system displays whether the employee is disabled as defined on the Disability page.

Copyright © 1988-2006, Oracle. All rights reserved.

Handicap Percent The system displays the employee's handicap percent as defined on the Disability page.

Re-Joined Disabled Employee Select to indicate that the worker has an official certificate and meets the conditions that are required to sign the specific kind of contract.

Additional Data

Use this group box to specify additional data to include in the AFI report.

Percentage of Part Time Enter the employee's part-time employment percentage.

First Self-Worker Employee Select to indicate that the worker has an official certificate and meets the conditions that are required to sign the specific kind of contract.

Special Labor Relationship Select to indicate that the job is in a profession considered a special labor relationship.

Inactivity Type If the employee is in an inactive situation maning non-working period, select the type of inactivity.

Partial Strike Activity Coeff. (coefficient) If the inactivity type is partial strike, enter the coefficient.

Substitution Reasons Select the reason why you are making a substitution for this worker.

Substitution EmplID Enter the ID of the substitute worker.

Vacation Not Taken End Date Select the end date of the period representing the vacation not taken and paid at termination.

Partial Subrogation Select to indicate that the contract is a partial subrogation.

Contract Begin Date Select the begin date corresponding to the original contract to which this new one is subrogating.

Relieve Contract Flag Select this check box to indicate that the contract relieves another.

Like-Active Status

Use this group box to communicate like-active situations. This group box becomes active when you select the Like-Active Communication value for the Social Security Action field on the Employee AFI Data page.

Like-Active Status Type Select the type of like-active situation to communicate about the employee. Possible values are:

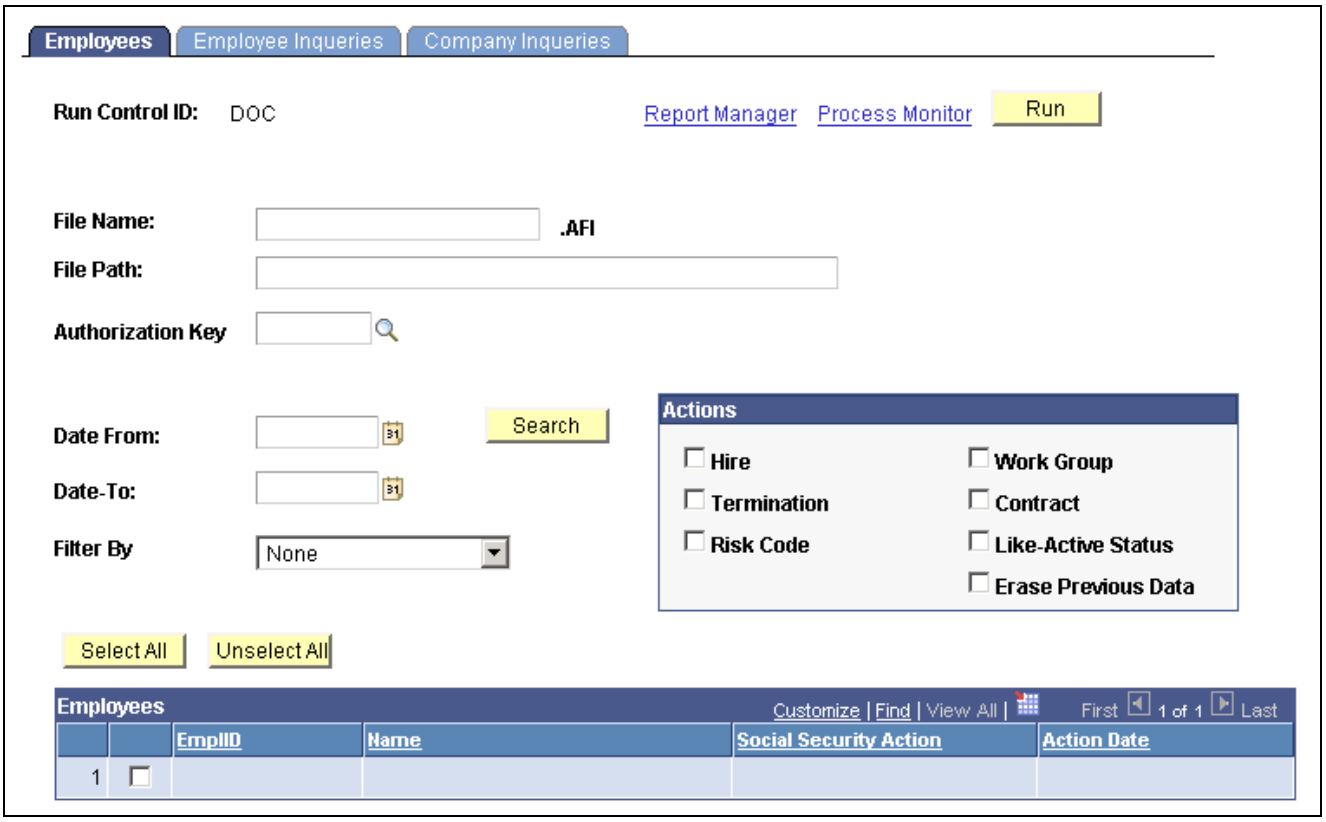
- *Domestic Violence:* The employee has a like-active situation because he or she is a victim of domestic violence.
- *PTO Not Taken:* The employee has a like-active situation from being paid PTO balance upon termination.

Period Begin Date and **Period End Date** Select the begin and end date of the like-active situation.

Creating the AFI File

Access the Create AFI File ESP - Employees page.

Copyright © 1988-2006, Oracle. All rights reserved.



Create AFI File ESP - Employees page

File Name Enter the name of the file that you want the process to use for the report. The system stores the data in an AFI file.

File Path Enter the path where you want the process to store the report file.

Authorization Key Select to narrow search results to employees working for companies with this authorization key. Social Security General Treasury provides companies with authorization codes to access Winsuite.

Date From and **Date-To** Enter a date range to find all employees with a change in social security status between these dates.

Filter By Select a filter to narrow search results further. When you select a filter, the Filter Data Grid becomes available to specify filter details. Available filters are:

- *CCC:* Select to run the process for a selected company and Codigo Cuenta de Cotizacion (CCC). The system displays the Filter Data Grid for you to select the company and social security number.
- *Company:* Select to run the process for selected companies. The system displays the Filter Data Grid for you to select the companies.
- *Department:* Select to run the process for selected departments. The system displays the Filter Data Grid for you to select the setID and departments.
- *Employee:* Select to run the process for selected employees. The system displays the Filter Data Grid for you to select the employee IDs.
- *None:* Select to search without a filter.

Search Click to retrieve results based on your search criteria.

Copyright © 1988-2006, Oracle. All rights reserved.

Filter Data Grid

Company Select the company for which to report data.

Social Security Number Select the employer's social security number for which to report data. If you leave this field blank, the extract file contains data for all of the employer's social security numbers.

SetID Select the department setID for which to report data.

Department Select the department for which to report data.

EmplID (employee ID) Select the specific employee ID for which to report data.

Actions

Hire Select to include employees who were hired.

Work Group Select to include employees whose work group changed.

Termination Select to include employees who were terminated.

Contract Select to include employees whose contracts changed.

Risk Code Select to include employees whose risk code changed.

Like-Active Status Select to include employees with like-active situations.

Erase Previous Data Select this check box to request deletion of previously communicated data.

Employees

The system displays employees that meet your search criteria and have AFI data that you still need to report to social security. The system displays only employees with social security actions that you have not yet communicated to social security in an AFI report. Select the check box next to the employee AFI data row to include the information in the AFI flat file.

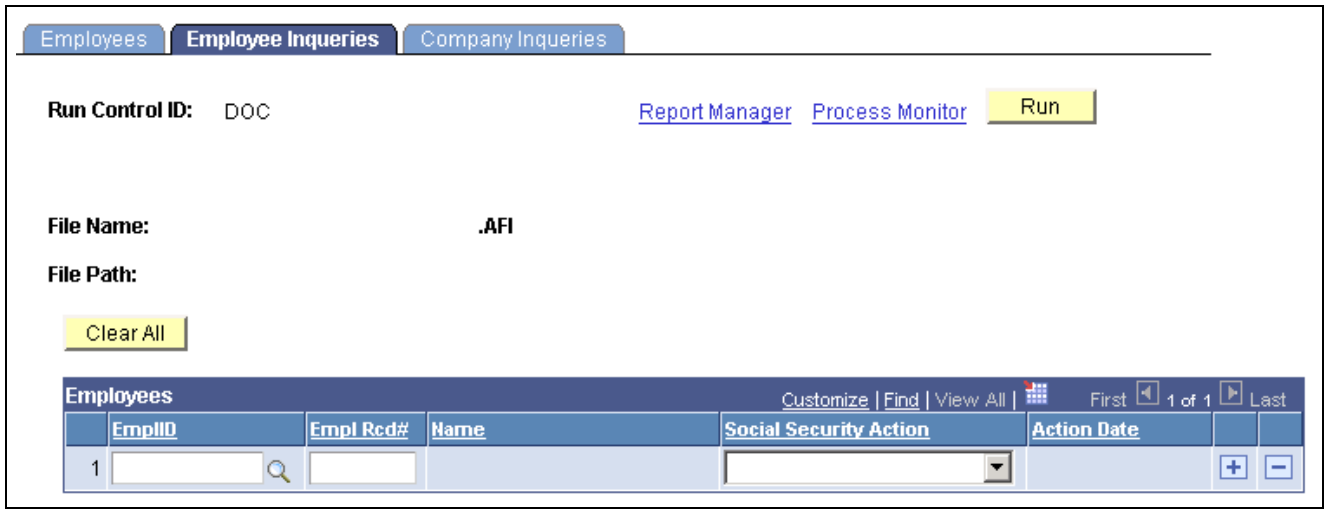
Select All Click this button to select all employees in the search results grid.

Unselect All Select this button to clear the check box for all employees in the search results grid.

Creating Employee Inquiries on the AFI Report

Access the Create AFI File ESP - Employee Inqueries page.

Copyright © 1988-2006, Oracle. All rights reserved.



Create AFI File ESP - Employee Inqueries page

Clear All Click this button to clear all rows in the Employees grid on this page.

EmplID and **Name** Select the employee for which you want to submit an inquiry to social security. The system displays the name of the employee that you select.

Social Security Action Select the inquiry that you want to submit to the Social Security General Treasury regarding the selected employee. Possible inquires are:

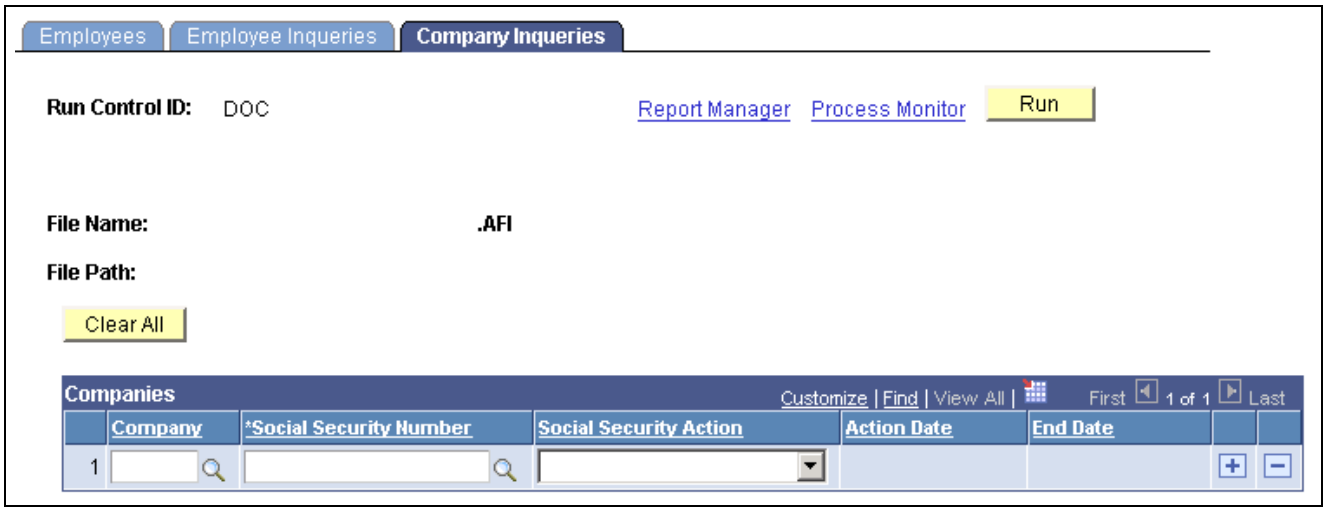
- *Inquire Current Situation:* Select to request the information that the Social Security General Treasury has about the employee.
- *Inquire IT Per Ill:* Select in request information about a temporary disability situation.
- *Inquire Previous Movements:* Select to request the information that the Social Security General Treasury has about previous movement in the CCC.
- *Inquire TA2 Copy:* Select to request a copy of a specific TA2 report. The system displays the Action Date field.

Action Date If you select to inquire about a duplicate TA2 copy, the system prompts you to enter the action date of the original TA2.

Creating Company Inquiries on the AFI Report

Access the Create AFI File ESP - Company Inqueries page.

Copyright © 1988-2006, Oracle. All rights reserved.



Create AFI File ESP - Company Inqueries page

Clear All Click this button to clear all rows in the Companies grid on this page.

Company Select the company for which you want to submit an inquiry to social security.

Social Security Number Select the employer's social security number for which to submit an inquiry. This field is required.

Social Security Action Select the inquiry that you want to submit to social security regarding the selected company. Possible inquires are:

- *Inquire CCC Situation:* Select to request the information that the Social Security General Treasury has about the company.
- *Inquire Current CCC Workers:* Select to request the information that the Social Security General Treasury has about current workers in the CCC.
- *Inquire Labor Life in CCC:* Select to request the information that the Social Security General Treasury has about labor life in the CCC.
- *Inquire Previous CCC Movement:* Select to request the information that the Social Security General Treasury has about previous movement in the CCC.

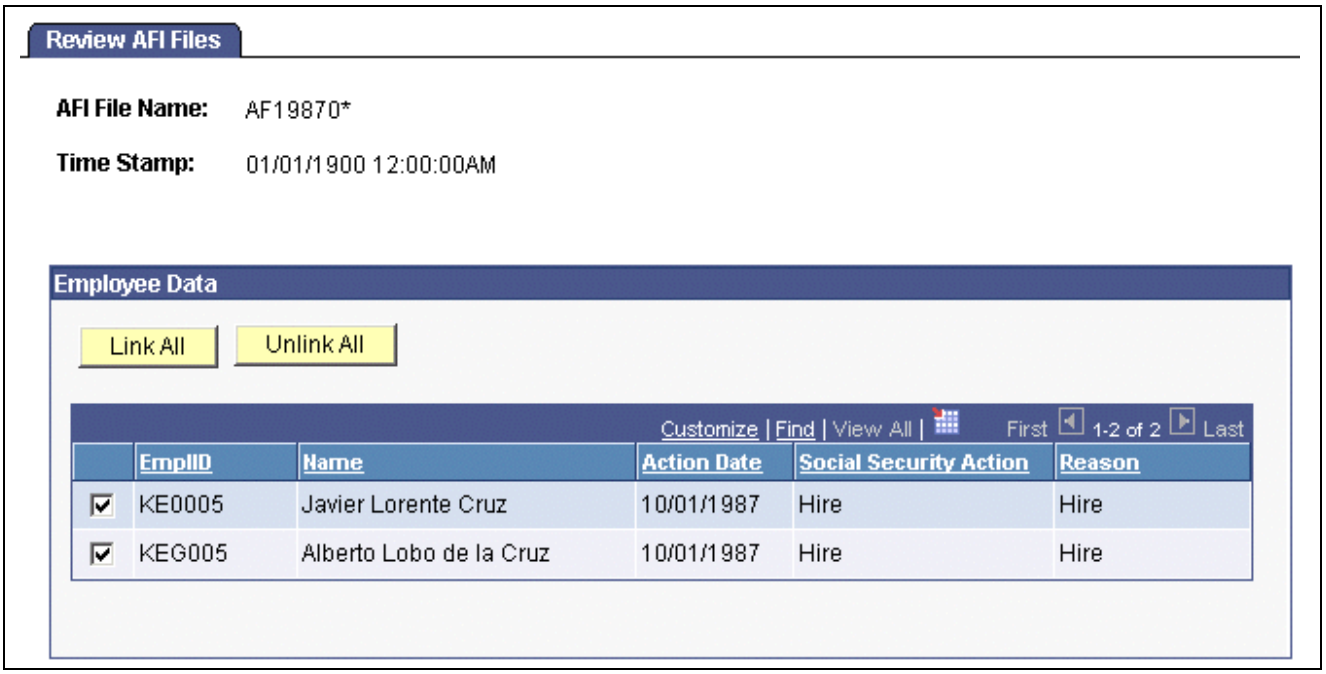
Action Date If you select to inquire about labor life in the CCC, the system prompts you to enter the start date of the period you are asking for information about.

End Date If you select to inquire about labor life in the CCC, the system prompts you to enter the end date of the period you are asking for information about.

Reviewing Employee Data on AFI Files

Access the Review AFI Files page.

Copyright © 1988-2006, Oracle. All rights reserved.



Review AFI Files page

The system displays a row for each employee and social security action combination that the AFI file generation process included in the AFI flat file. If an employee has more than one action in the file, each action appears as a distinct row.

To unlink the employee's AFI data from the selected AFI flat file, clear the corresponding check box for that row of data. By default the system select all rows of data. Upon saving the page, the system clears the AFI File Name field for the cleared row, thus making this row of employee AFI data available for inclusion a future AFI file generation. You might do this, for instance, if you have included employee AFI data in the communication by mistake and need to resend the data for the employee.

Warning! When you click the Save button the system permanently frees the cleared rows from association with the selected AFI flat file. You will not be able to reverse this action. Note, also, that the data for the cleared rows are still part of the actual AFI flat file. To remove that data from the file, you must regenerate the AFI file with refined filter criteria that excludes this data.

AFI File Name The system displays the name of the AFI flat file that includes the employee AFI data. When accessing this page, you can use this field to search for the AFI file for which you want to view employee data.

Time Stamp For AFI data communicated by AFI file, the system displays the time and date of the AFI flat file generation. For AFI data communicated online, the system displays the system time and date. When accessing this page, you can use this field to search for the AFI file for which you want to view employee data.

Employee Data

Use this group box to select the employees whose AFI data you want to include in the AFI flat file, or to clear the employee's association with the generated AFI flat file so that you can process that employee's information again.

Link All Click this button to select the check box for all rows of employee data.

Copyright © 1988-2006, Oracle. All rights reserved.

Unlink All Select this button to clear the check box for all rows of employee data.

Copyright © 1988-2006, Oracle. All rights reserved.

CHAPTER 12

(JPN) Tracking Additional Appointments (Kenmu)

This chapter provides an overview of additional appointments (*kenmu*) and discusses how to:

- Set up codes for tracking additional appointments.
- Set up security for tracking additional appointments.
- Set up to handle additional appointment terminations.
- Record and view employee additional appointments data.

Understanding Additional Appointments

You track additional appointments as additional jobs (employment record numbers) in the Job record. You can track multiple additional appointment rows for each main appointment row of the Job record using the Additional Appointment Information page. The Enter Cost Rate Information page enables you to track cost rate distribution among a main appointment and its additional appointments.

The system automatically increments employment record numbers, including additional appointments. The total number of additional appointments appears with main appointment data on the employee's Job Summary JPN page.

When additional appointments exist in conjunction with intercompany transfers, for example when you serve as a hosting company, you can store information about additional appointments that your transferee may have in the home company, as well as any additional appointment information within your company as host.

On the Employee Assignment List report, you can view employees by department, including an employee's additional appointments.

When you terminate a main appointment, the system automatically terminates all additional appointments associated with it.

See Also

Chapter 15, "Updating Person and Job Information," (JPN) Understanding Reporting Appointments for Job Data Changes, page 576

Internal and External Companies

Some of the pages used for tracking additional appointments distinguish between internal and external company appointments. Here are the definitions of internal and external companies:

Internal Companies — Companies that are internal to your organization's database. Data for these companies is already set up on the Company table and Department table.

Copyright © 1988-2006, Oracle. All rights reserved.

External Companies Companies that are external to your organization's database. You must set up data for these companies on the Intercompany Transfer Company/Department table.

Setting Up Codes for Tracking Additional Appointments

To set up the codes for tracking additional appointments, use the IC Trans External Company/Dept (INTCPX_CPY_JPN), IC Trans External Superv Lvl (INTCPX_SPV_JPN), Additional Appointment Setup for Existing Business Units (RC_AA_JOBCODE_JPN), and Additional Appointment Setup (AA_SETUP_JPN) components.

This section provides overviews of dummy codes and setup steps for additional appointments, lists prerequisites, and discusses how to:

- Set up a dummy business unit, company, department, and location.
- Designate Job record codes for additional appointments.

Understanding Dummy Codes

Setup for additional appointment tracking requires the use of dummy codes.

Dummy Job Code

The PeopleSoft system provides a dummy job code for use with all additional appointments. The dummy job code is needed because additional appointment data is held on the Job record, which requires a job code. Because job codes are not tracked as part of additional appointment data, the dummy code is required to save the Job record with additional appointment information. The dummy job code is only used in background processing for saving, and is never visible on any page except the Additional Appointment Setup and Job Code Table pages.

The delivered dummy job code is *AADUMY.* The system automatically creates this job code for each new business unit that you define. If you have already created business units, the system provides an application engine process that creates the dummy job code for each existing business unit. You only have to run the application engine one time. Subsequently, the system automatically creates the dummy job code when you define a new business unit.

See Chapter 12, "(JPN) Tracking Additional Appointments (Kenmu)," Pages Used to Set Up Codes for Managing Additional Appointments, page 481.

Dummy Business Unit, Company, Department, and Location Codes

When the additional appointment is in an external company, the business unit, company, department, and location codes setup for the external company are on the IC Transfer setup tables only, which are not values used in the Job record. Therefore, you must define one dummy code for each of these required fields so that you can save Job record information for additional appointments to external companies. Set up and use the same codes for all additional appointments to external companies. The PeopleSoft system does not deliver these dummy codes.

The dummy codes are only used in background processing for saving and are never visible on any page except the Additional Appointment Setup page.

 Copyright © 1988-2006, Oracle. All rights reserved.

Warning! The department code can impact security, so it is important to create a new department code for which no one has security access. Anyone who can access the dummy department through security will be granted access to all main appointments that have an external assignment.

See Also

Chapter 12, "(JPN) Tracking Additional Appointments (Kenmu)," Setting Up a Dummy Business Unit, Company, Department, and Location, page 481

Chapter 12, "(JPN) Tracking Additional Appointments (Kenmu)," Designating Job Record Codes for Additional Appointments, page 482

Understanding Setup Steps for Additional Appointments

The setup steps for additional appointment tracking vary slightly depending upon whether you:

- Initially implement PeopleSoft Enterprise Human Resources with additional appointment tracking before you set up business units.
- Add additional appointment tracking after you have already set up business units, such as during an upgrade.

Both situations require that you create dummy codes and assign them on the Additional Appointment Setup page. The details of how to do this are presented in subsequent sections.

Business Units Are Not Defined

Here are the steps for setting up additional appointment tracking when you have not yet defined business units:

1. Select Additional Appointment Enabled in the Japanese Parameters section of the Installation Table - Country Specific page.
2. Set up your organization's business units on the Business Unit page.

   The system automatically creates the dummy job code *AADUMY* for each business unit that you define.
3. Create a dummy business unit, company, department, and location for use with additional appointments to external companies.
4. Assign the dummy codes on the Additional Appointment Setup page.
5. (Optional) Set up additional appointment security.

Business Units Are Defined

If you are setting up additional appointment tracking when you have already defined business units, such as when upgrading, the steps are the same as listed in the previous section with the exception of step 2:

1. Select Additional Appointment Enabled in the Japanese Parameters section of the Installation Table - Country Specific page.
2. Run the AA_JOBCODE_JPN Application Engine process to create the dummy job code *AADUMY* for each business unit in your system.

   You only have to run the application engine process one time. Subsequently, the system automatically creates the dummy job code for each business unit that you define.
3. Create a dummy business unit, company, department, and location for use with additional appointments in external companies.
4. Enter the dummy codes on the Additional Appointment Setup page.

Copyright © 1988-2006, Oracle. All rights reserved.

5. (Optional) Set up additional appointment security.

See Also

Chapter 12, "(JPN) Tracking Additional Appointments (Kenmu)," Setting Up Security for Tracking Additional Appointments, page 482

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Installing PeopleSoft HRMS"

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," Defining Business Units

Prerequisites

If you plan to track additional appointments in external companies, you must set up the following information for the external companies:

- Company and department IDs for external company appointments on the IC Trans External Company/Dept page.

  See Chapter 3, "Setting Up Country-Specific Tables," (JPN) Setting Up Intercompany Transfer Company Data, page 64.

- Supervisor levels for external company appointments on the IC Trans External Superv Lvl page.

These codes provide the prompt values on the Edit Additional Appointment Information page and are visible on pages that display employee additional appointment data.

 Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Set Up Codes for Managing Additional Appointments

Page Name	Object Name	Navigation	Usage
IC Trans External Company/Dept	INTCPX_CPY_JPN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, IC Trans External Company/Dept	Set up company and department codes for intercompany transfers to and additional appointments in external companies.
IC Trans External Superv Lvl	INTCPX_SPV_JPN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, IC Trans External Superv Lvl	Set up supervisor level codes for intercompany transfers to and additional appointments in external companies.
Additional Appointment Setup for Existing Business Units	RC_AA_JOBCODE_JPN	Set Up HRMS, Install, Product and Country Specific, AA Setup for Existing BUs JPN	Run the AA_JOBCODE_JPN Application Engine process to create the dummy *AADUMY* job code for each existing business unit. Run this process only if business units already exist at the time of implementing additional appointment tracking. You only run this process one time.
Additional Appointment Setup	AA_SETUP_JPN	Set Up HRMS, Product Related, Workforce Administration, Workforce Data JPN, Additional Appointment Setup	Enter the dummy business unit, company, department, location, and job codes to populate required entry fields on the Job record for additional appointments.

Setting Up a Dummy Business Unit, Company, Department, and Location

Set up one dummy code to be used with all additional appointments for each of the following:

- Business unit

  See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, “Setting Up Organization Foundation Tables,” Defining Business Units.

- Company

  See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, “Setting Up Organization Foundation Tables,” Entering Company Information.

- Department

  See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, “Setting Up Organization Foundation Tables,” Maintaining Departments.

- Location

Copyright © 1988-2006, Oracle. All rights reserved.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up Organization Foundation Tables," Establishing Locations.

Additional Setup Instructions

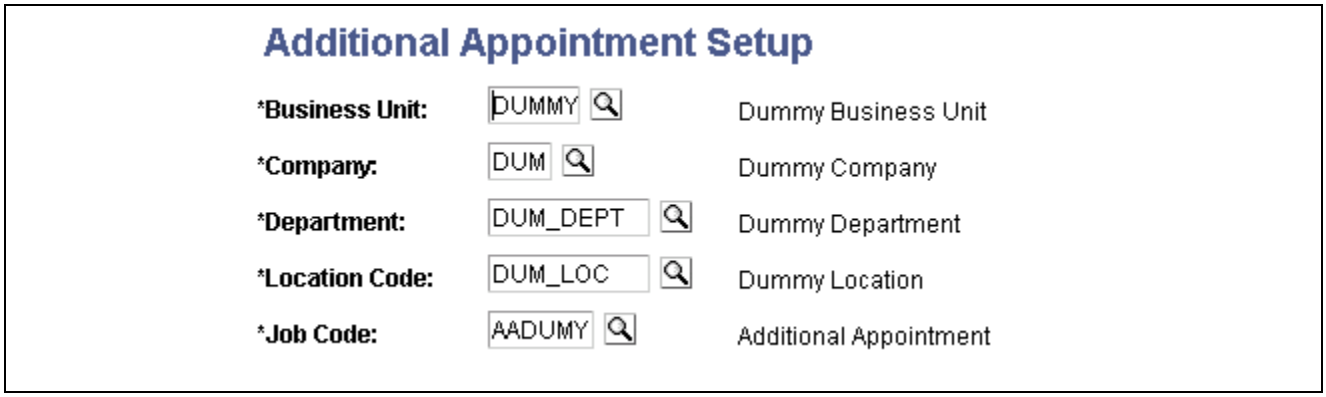
The following are important points to keep in mind when setting up these dummy codes for use with additional appointments to external companies:

- We recommend that they not be real business unit, company, department, and location codes because of the possible effect on security and reporting.
- You may use a real, existing setID to define the dummy codes.
- The dummy department must be excluded from the department tree.

  Otherwise, anyone who has access to the dummy department has access to *all* main appointments of employees who have an additional appointment in an external company.

Designating Job Record Codes for Additional Appointments

Access the Additional Appointment Setup page.



Additional Appointment Setup page

The prompt values for the Business Unit, Company, Department, and Location Code fields are the valid codes set up in the respective setup tables for your PeopleSoft database. In each field, select the single dummy code that you defined for use with additional appointments.

Job Code *AADUMY* is the default value.

The system uses the values on this page to populate the Job record so that it can be saved.

Setting Up Security for Tracking Additional Appointments

To set up the security for tracking additional appointments, use the Security Install Settings (SCRTY_INSTALL), Security Type Table (SCRTY_TYPE2_TBL), and AA Security JPN (ADDAPPT_SEC_JPN) components.

This section provides an overview of security for additional appointments and discusses how to:

- Set up the security basis for additional appointments.
- Select reports that use additional appointment security.

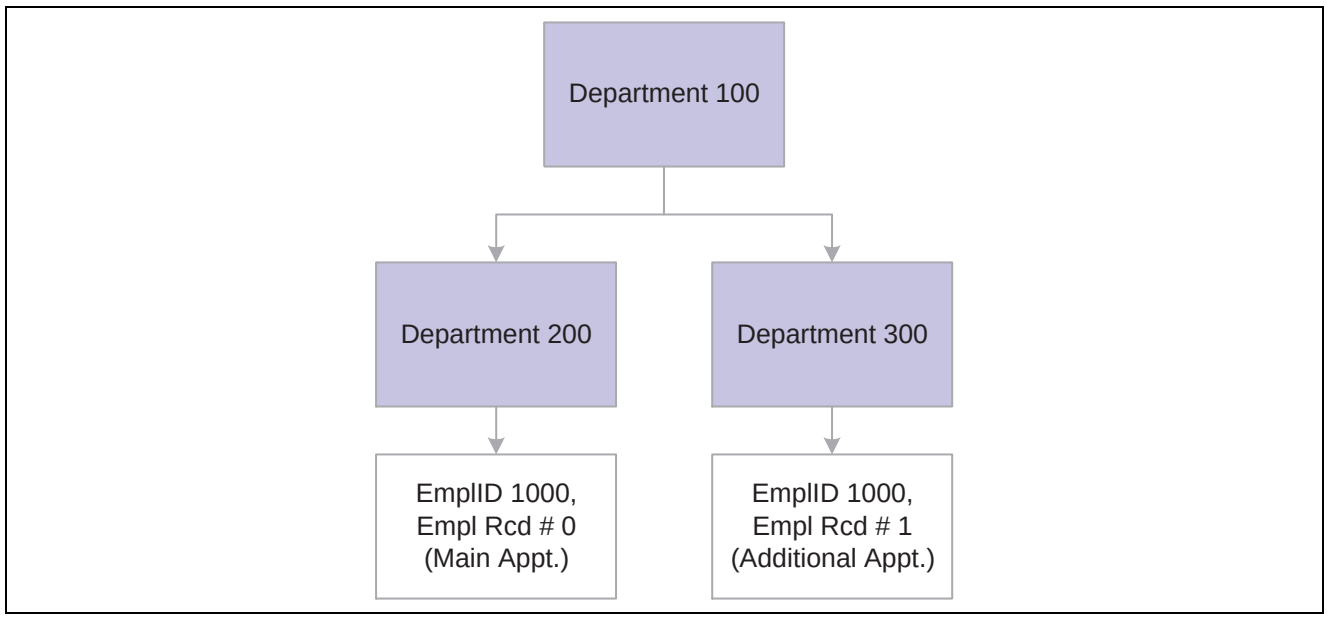
 Copyright © 1988-2006, Oracle. All rights reserved.

Understanding Security for Additional Appointments

The PeopleSoft system provides two security options for accessing additional appointment data, departmental security and security for additional appointments. If you choose to use the default option, departmental security, additional appointments do not provide any additional security access. The user must have access to the department in which the main appointment resides to access an employee's data. If you set up security for additional appointments, then additional appointments do provide additional security access. A user can view the main appointment if the main appointment or any of its additional appointments resides in a department to which the user has access.

Example of Security Access

This example of security access is based on the following department security tree:



Sample department security tree

Here is how security works for the two security options:

- If you choose to use the default, departmental security:
  - If the user has access to department 200, then the user has access to the data for employee ID 1000.
  - Even if the user has access to department 300, the user does not have any access to the data for employee ID 1000.
- If you choose to set up security for additional appointments:
  - If the user has access to department 200, then the user has access to the data for employee ID 1000.
  - If the user has access to department 300 only, then the user can access the data for employee ID 1000 because the employee has an additional appointment in department 300.

Note. Security access is dependent on the system date being earlier than the effective date of the release of the additional appointment. Security access to the data row ceases with the effective date of the additional appointment release.

Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Set Up Security for Additional Appointments

Page Name	Object Name	Navigation	Usage
Security Install Settings	SCRTY_INSTALL	Set Up HRMS, Security, Core Row Level Security, Security Installation Settings, Security Install Settings	Choose the HRMS security settings for your installation.
Security Type Table	SCRTY_TYPE2_TBL	Set Up HRMS, Security, Core Row Level Security, Security Access Type, Security Type Table	Use to enable existing security access types or create new ones.
AA Security JPN	AA_SECURITY_JPN	Set Up HRMS, Security, Core Row Level Security, .Addl Appt SQR Security JPN	Select the reports that use additional appointment security.

Setting Up Additional Appointment Security

To set up security for additional appointments:

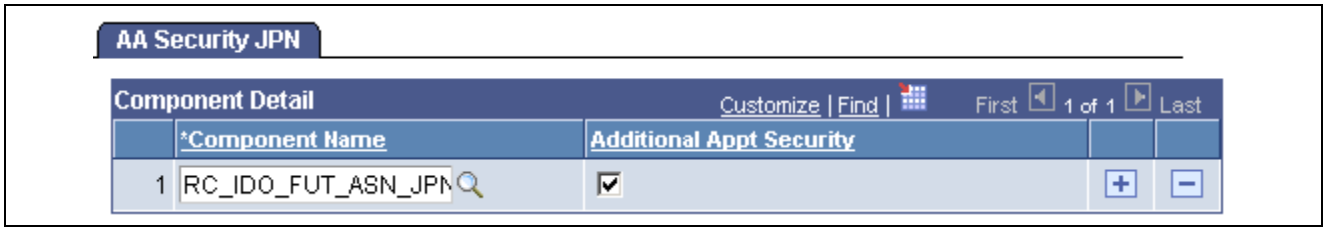
1. Select *JPN Appointment* on the Security Install Settings page.
2. Select *JPN Additional Appointment* on the Security Type Table page for the PPLJOB security set.
3. Refresh the security join tables using the Refresh SJT_CLASS_ALL component (SCRTY_OPR_RC).

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Selecting Reports that Use Additional Appointment Security

Access the AA Security JPN page.



AA Security JPN page

The following table lists the only reports that can be enabled for additional appointment security and the component name to select on the report page:

Report ID	Report Name	Component Name
PER062JP	Grade Advance Candidate List	RUNCTL_PER062_JPN
PER063JP	Appointment Notification JPN	RUNCTL_NTF_JPN

Copyright © 1988-2006, Oracle. All rights reserved.

Report ID	Report Name	Component Name
PER064JP	Appointment List JPN	RUNCTL_NTF2_JPN
PER065JP	Completion of IC Transfer JPN	RUNCTL_PER065_JPN
PER066JP	Employee Assignment List JPN	EMP_ASN_LST_JPN
PER072JP	Future Employee Assignment List	RC_IDO_FUT_ASN_JPN
PER074JP	Ido Candidate Listing	RC_IDO_EE_LIST_JPN

For other reports, the only way to access information on the main appointment is to have access to the department on which the main appointment resides. The department of the additional appointment does not provide any additional access for any reports other than the five reports listed here, even when additional appointment security is activated.

The purpose of activating additional appointment security for these reports is to display the main appointments when there is security access to the additional appointment. Activating additional appointment security does not display additional appointments on PER062JP, PER063JP, PER064JP, and PER065JP. PER066JP, PER072JP, and PER074JP display additional appointments.

When additional appointment security is activated for these five reports, the system evaluates only current job information. The system ignores future-dated job rows, such as future-dated hires or terminations. Regardless of the security option selected, the system uses only the current row to determine security access.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Setting Up to Handle Additional Appointment Terminations

When you terminate a main appointment, the system employs a message subscription that uses a component interface to automatically terminate all additional appointments that are associated with the main appointment.

The message subscription is delivered inactive; you must activate it if you use additional appointment functionality. Following are the details you need to activate the subscription:

Message subscription Termination_Add_Appt

Message name WORKFORCE_SYNC

Channel PERSON_DATA

Tables written to JOB

Termination rows are inserted for all active additional appointments associated with the terminated main appointment.

Copyright © 1988-2006, Oracle. All rights reserved.

See Also

PeopleSoft Enterprise Components for PeopleSoft Enterprise HRMS and Campus Solutions 9.0 PeopleBook, "PeopleSoft Enterprise Integration"

Recording and Viewing Employee Additional Appointments Data

This section discusses how to:

- Add, change, or release additional appointments.
- Record additional appointment details.
- Distribute cost.

Note. To access additional appointment data, you must first access the associated main appointment in the search page.

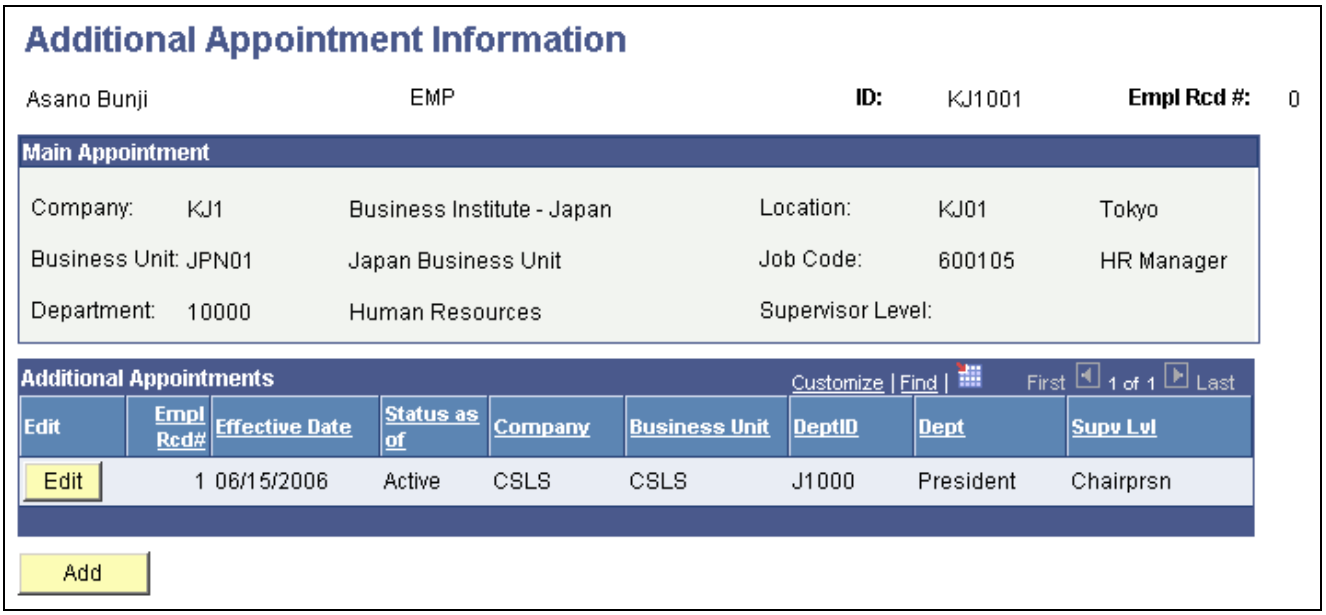
Pages Used to Record and View Employee Additional Appointments Data

Page Name	Object Name	Navigation	Usage
Additional Appointment Information	AA_MGMT_JPN	Workforce Administration, Job Information, Additional Appointment JPN	Add, change, or release additional appointments.
Edit Additional Appointment Information	AA_MGMT_JPN_SEC	Click the Add or Edit button on the Additional Appointment Information page.	Record details of additional appointments.
Enter Cost Rate Information	AA_MGMT2_JPN	Workforce Administration, Job Information, Cost Rate JPN	Distribute the cost of a main appointment among its additional appointments.
Job Summary JPN	JOB_SUMMARY_JPN	Workforce Administration, Job Information, Review Job Information, Job Summary JPN	View an employee's job history, including additional appointment total. Access details of additional appointments.
Additional Appointment Data	ADD_APPT_SUMM_SEC	Click the View link for an additional appointment on the Job Summary JPN, Work Location page.	View details of additional appointments.

Adding, Changing, or Releasing Additional Appointments

Access the Additional Appointment Information page.

Copyright © 1988-2006, Oracle. All rights reserved.



Additional Appointment Information page

Additional Appointments

This section of the page displays information about existing additional appointments.

Empl Rcd # (employment record number) The system assigns this number when you add an additional appointment. The system increments the employment record numbers whether an additional appointment or a concurrent job is added. (Concurrent jobs may be added to the system for the purpose of tracking intercompany transfers in a multicompany implementation or for adding a global assignment record.)

Effective Date The effective date of the latest data row for the employment record number. This date might be later than the system date if additional appointment information was entered with an effective date in the future.

Status as of The status of the appointment as of the date in the Effective Date field for this employment record number. Values are *Active* and *Inactive*.

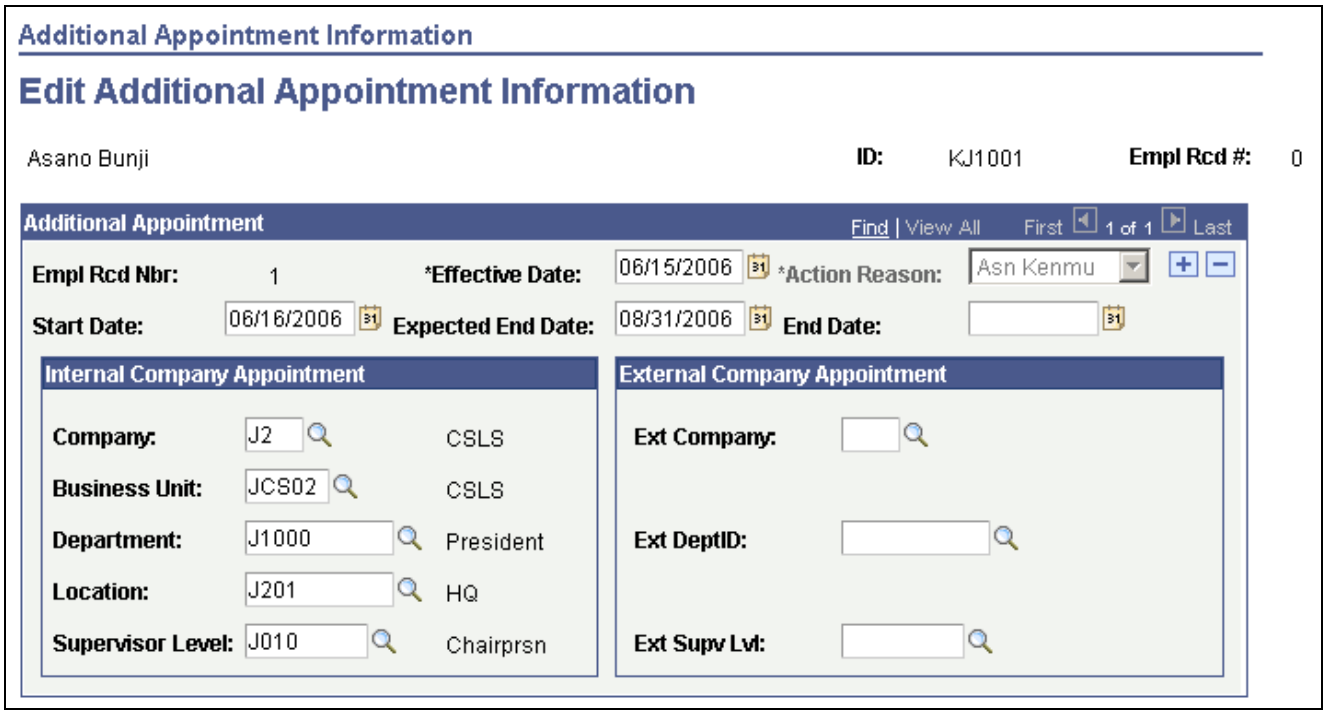
Edit Click to access the Edit Additional Appointment Information page, where you can change or release the selected additional appointment.

Add Click this button to add an additional appointment. The system displays the Edit Additional Appointment Information page, where you record the details of the new appointment.

Recording Additional Appointment Details

Access the Edit Additional Appointment Information page.

Copyright © 1988-2006, Oracle. All rights reserved.



Edit Additional Appointment Information page

Additional Appointment

Empl Rcd Nbr (employment record number) The system assigns this number when you add an additional appointment. The system increments the employment record numbers whether an additional appointment or a concurrent job is added. (Concurrent jobs may be added to the system for the purpose of tracking intercompany transfers in a multicompany implementation or for adding a global assignment record.)

Action Reason Three action reason codes are valid for additional appointments:

Asn Kenmu (assign *kenmu*): If you click the Add button on the Additional Appointment Information page to access this page, the system enters *Asn Kenmu* and you cannot change it. If you click the Edit button to access the page, you cannot save the page if you select *Asn Kenmu.*

Data Chg (data change): Select this value if you are changing (but not releasing) an additional appointment.

Rel Kenmu (release *kenmu*): Select this value if you are releasing the *kenmu* assignment.

Copyright © 1988-2006, Oracle. All rights reserved.

Note. The codes that you enter on this page are translated into action and reason codes on the Job record as follows:

Asn Kenmu: The Job record action is *ADL* (additional job) and the reason is *AKM* (assign *kenmu*).

Data Chg: The Job record action is *DTA* (data change) and no action reason is associated with it.

Rel Kenmu: The Job record action is *TER* (termination) and the reason is *RKM* (release *kenmu*).

These Job record rows are not visible to users.

Start Date Enter the date on which this additional appointment starts.

Expected End Date Enter the date on which the additional appointment is expected to end.

End Date Enter the date on which the additional appointment actually ends.

Note. The system displays a warning if the End Date value is later than the Effective Date value of the additional appointment release. Security access to the data row ceases with the effective date of the additional appointment release.

Note. You can enter information in either the Internal Company Appointment group box or the External Company Appointment group box. You cannot use both group boxes at the same time.

Internal Company Appointment

Use this group box if the additional appointment is with a company that is included in your organization's database (internal company).

See Chapter 12, "(JPN) Tracking Additional Appointments (Kenmu)," Internal and External Companies, page 477.

External Company Appointment

Use this group box if the additional appointment is with a company that is outside of your organization's database (external company). Prompt values come from the data that you set up on the IC Trans External Company/Dept page and the IC Trans External Superv Lvl page.

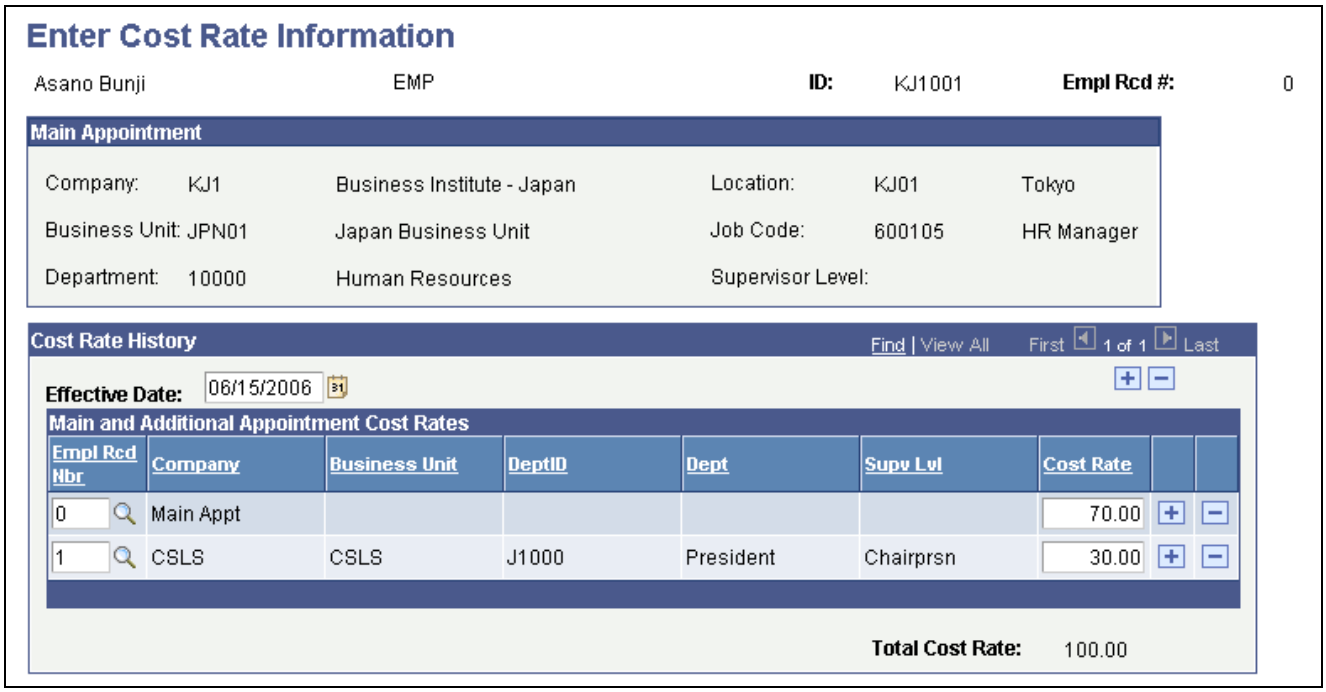
See Also

Chapter 12, "(JPN) Tracking Additional Appointments (Kenmu)," Prerequisites, page 480

Distributing Cost

Access the Enter Cost Rate Information page.

Copyright © 1988-2006, Oracle. All rights reserved.



Enter Cost Rate Information page

Effective Date Enter an effective date for when the additional appointment cost rates are being distributed or redistributed.

Main and Additional Appointment Cost Rates

Empl Rcd Nbr (employment record number) Choose the employment record number for each main or additional appointment that has an associated cost. The only values available in the list are the record numbers of additional appointments associated with the main appointment that you entered to access the page.

When you save the page, the system validates that the employment record is active as of the selected effective date.

Cost Rate Enter the percentage cost associated with the main appointment and each additional appointment.

Total Cost Rate When you save the page, the system validates that the total cost rate for the main appointment and all of its additional appointments equals 100 percent.

Copyright © 1988-2006, Oracle. All rights reserved.

CHAPTER 13

(JPN) Tracking Intercompany Transfers (Shukkou)

This chapter provides an overview of the tracking of intercompany transfers and discusses how to:

- Set up employee data for intercompany transfers.
- Enter and maintain home and host data for intercompany transfers.
- Work with search page security.
- Run the Intercompany Transfer report.

Understanding the Tracking of Intercompany Transfers

Whenever you need to track intercompany transfers (*shukkou*), whether as a home company or a host company, you enter a new job record with standard actions such as transfer, termination, and hire, but with specific action reasons that are related to intercompany transfers. You can use the Pay Group field on the Job Data - Payroll page to indicate which company is the compensation owner.

This section discusses home and host data for intercompany transfers and lists prerequisites.

Summary of Home and Host Data for Intercompany Transfers

The tables in the two sections that follow provide summarized data entry obligations and requirements for different intercompany transfer scenarios. The first table addresses only the hosting of intercompany transfers; the second table addresses both temporary and permanent intercompany transfers.

A later section provides details of data entry for a series of scenarios.

See Chapter 13, "(JPN) Tracking Intercompany Transfers (Shukkou)," Entering and Maintaining Home and Host Data for Intercompany Transfers, page 496.

This table explains the abbreviations that are used in the two subsequent tables:

Code	Description	Action
ICT	Intercompany Transfer	*Shukkou*
TICT	Temporary Intercompany Transfer	*Zaiseki-Shukkou*
PICT	Permanent Intercompany Transfer	*Tenseki-Shukkou*

Copyright © 1988-2006, Oracle. All rights reserved.

Code	Description	Action
HICT	Hosting Intercompany Transfer	*Shukkou-Ukeire*
HTICT	Hosting Temporary Intercompany Transfer	*Zaisekki-Shukkou no Ukeire*
HPICT	Hosting Permanent Intercompany Transfer	*Tenseki-Shukkou no Ukeire*
SL	Supervisor Level	*Yakushoku*
AA	Additional Appointment	*Kenmu*
PA	Primary Appointment	*Shumu*

Hosting Temporary and Permanent Intercompany Transfers

The following table summarizes the information and security requirements for hosting temporary intercompany transfers from companies within a group that uses PeopleSoft Enterprise HRMS and from other companies that don’t use PeopleSoft Enterprise HRMS:

Copyright © 1988-2006, Oracle. All rights reserved.

ICT Type	PA Location	Information and Security Required Within Affiliated Companies that Use PeopleSoft Enterprise HRMS	Information and Security Required for Affiliated Companies that Do Not Use PeopleSoft Enterprise HRMS
1 HTICT	Host (Own Company)	• Host company information, using shared codes. • The owner of payroll. • ICT period, department, SL, and so on. • In general, employee information is maintained at host (own) company when PA is moved from PA's own company.	• Host company information, using Intercompany Transfer Company /Department and Intercompany Transfer Supervisor Level codes. • The owner of payroll. • ICT period.
2 HPICT	Host (Own Company)	Employee information is maintained at host (own) company only.	Host company information, using Intercompany Transfer Company /Department and Intercompany Transfer Supervisor Level codes.

Temporary and Permanent Intercompany Transfers

This table summarizes the information and security requirements for temporary intercompany transfers to companies within a group that uses PeopleSoft Enterprise HRMS and to other companies that don't use PeopleSoft Enterprise HRMS:

Copyright © 1988-2006, Oracle. All rights reserved.

ICT Type	PA Location	AA at Home Company?	Information and Security Required Within Affiliated Companies that Use PeopleSoft Enterprise HRMS	Information and Security Required for Affiliated Companies that Do Not Use PeopleSoft Enterprise HRMS
TICT	Host	No	• Host company information, using shared codes (in case of PS – using group–company). • The owner of payroll. • TICT period, department, SL, and so on. • In general, employee information is maintained at host (own) company when PA is moved from PA's own company.	• Host company information, using Intercompany Transfer Company /Department and IC Transfer Supervisor Level codes. • The owner of payroll. • TICT period.
PICT	N/A (Completely terminated from home company)	N/A	Employee information will be maintained at host company only.	N/A

Prerequisites

Before you enter intercompany transfers for an employee, complete these steps:

- Set up a dummy pay group to use as the compensation indicator if you track intercompany transfers in which the host company (that is, not your company) is responsible for paying the employee.

  Note. This setup is reversed if your company is the hosting company; that is, you set up a dummy pay group to track hosted intercompany transfers where the home company pays the employee.

- Set up company and department codes to use for tracking intercompany transfers to and from companies that are not registered in the Company table.
- Set up supervisor level and IC Trans External supervisor level codes to use for tracking intercompany transfers to and from companies that are not registered in the Company table.

Copyright © 1988-2006, Oracle. All rights reserved.

Note. You can track intercompany transfers (*shukkou*) as additional appointments (*kenmu*) if you set up and use the additional appointment functionality.

See Also

Chapter 3, "Setting Up Country-Specific Tables," (JPN) Setting Up Intercompany Transfer Company Data, page 64

Chapter 12, "(JPN) Tracking Additional Appointments (Kenmu)," page 477

Chapter 13, "(JPN) Tracking Intercompany Transfers (Shukkou)," Indicating the Home or Host Compensation Owner, page 496

Setting Up Employee Data for Intercompany Transfers

This section discusses how to:

- Track intercompany transfers.
- Indicate the home or host compensation owner.

Note. This section discusses the basics of how to set up an intercompany transfer. See the next section for detailed examples of data entry and maintenance.

See Also

Chapter 13, "(JPN) Tracking Intercompany Transfers (Shukkou)," Entering and Maintaining Home and Host Data for Intercompany Transfers, page 496

Tracking Intercompany Transfers

Whenever you need to track intercompany transfers, whether as a home company or a host company, set up the employee data:

- Enter a new job record with standard actions such as transfer, termination, and hire, but with specific action reasons that are related to intercompany transfers.
- Complete the intercompany transfer fields in the Japan section of the Work Location page.

Selecting Actions and Reasons for Intercompany Transfers

These are the actions and reasons that you use on the Administer Workforce pages when you work with intercompany transfers:

Action	Reason
Transfer	Intercompany transfer.
	Completion of intercompany transfer.

Copyright © 1988-2006, Oracle. All rights reserved.

Action	Reason
Termination	Permanent intercompany transfer.
	Completion of (hosted) intercompany transfer.
Hire	Temporary intercompany transfer.
	Permanent intercompany transfer.

See Also

Chapter 6, “Increasing the Workforce,” Entering Employee Job Location and Position Information, page 152

Indicating the Home or Host Compensation Owner

You can use the Pay Group field on the Job Data - Payroll page to identify whether the home or the host company is responsible for paying an employee on temporary intercompany transfer. If the home company is paying, put the employee in a standard pay group with other employees. If the host company is paying, put the employee in a designated dummy pay group that has no payroll processing implications for your (home) company.

Similarly, if you are the host for a temporary intercompany transfer, put the employee in a standard pay group if you are paying the employee, or into a designated dummy pay group if the home company is paying the employee.

Note. When the Payroll System field is set to *Other* on the Job Data - Payroll page, the Pay Group field is not a required field. You can use the field as described previously whether it is required or not.

See Also

Chapter 6, “Increasing the Workforce,” Entering Payroll Processing Data, page 175

Entering and Maintaining Home and Host Data for Intercompany Transfers

The following three sets of scenarios detail the data input and maintenance requirements by the home or host company. Sets B and C are similar, but reflect different security conditions.

The sets of scenarios are:

- Set A: Single Company Using a Single PeopleSoft Enterprise HRMS Database.
- Set B: Multiple Companies Using a Single PeopleSoft Enterprise HRMS Database (with security restrictions).
- Set C: Multiple Companies Using a Single PeopleSoft Enterprise HRMS Database (without security restrictions).

 Copyright © 1988-2006, Oracle. All rights reserved.

Single Company Using a Single PeopleSoft Enterprise HRMS Database: Scenarios A1-8

This section discusses several scenarios for a single company that uses a single human resources database.

Note. Additional Employment Instance is not used for any scenarios in set A. The scenarios in set A are applicable when multiple companies use a single human resources database but the information—for the home or host company relevant to a particular intercompany transfer—is not stored in that database.

Scenario A1: TICT

Home Company Inputs

Table	Fields	Input
JOB	Action	Transfer.
	Reason	Temporary intercompany transfer.
	Department ID	Department ID that indicates temporary intercompany transfer.
	Pay Group	If the home company is responsible for compensation, no change occurs to the pay group. If not, enter a dummy pay group to indicate that the host (other) company is responsible for compensation. No processing is associated with dummy pay groups.
JOB_JR	Intercompany Transfer Flag	Host company information.
	Business Unit code	If the home company is a normal (internal) company, enter the code. If not, leave this field blank.
	Company code	If the Host company is a normal (internal) company, enter the code. If it is an external company, enter the ICT Company code.
	Department code	If the host company is a normal (internal) company, enter the department code. If it is an external company, enter the ICT Department code.
	Sup Lvl ID code	If the host company is a normal (internal) company, enter the supervisor level ID. If it is an external company, enter the ICT supervisor level ID.

Copyright © 1988-2006, Oracle. All rights reserved.

Table	Fields	Input
	ICT Start Date	Actual start date of intercompany transfer.
	ICT End Date	Expected end date of ICT.

Host Company Inputs

Not applicable.

Scenario A2: Completion of TICT

Home Company Inputs

Table	Fields	Input
JOB	Action	Transfer.
	Reason	Completion of ICT.
	Department ID	Employee's home company department.
	Pay Group	Employee's home company pay group.

Host Company Inputs

Not applicable.

Scenario A3: PICT

Home Company Inputs

Table	Fields	Input
Job	Action	Termination.
	Reason	Permanent intercompany transfer.
JOB_JR	Intercompany Transfer Flag	Host company information.
	Business Unit (code)	If the home or host company is a normal (internal) company, enter the code. If not, leave this field blank.
	Company code	If the host company is a normal (internal) company, enter the code. If it is an external company, enter the ICT Company code.

Copyright © 1988-2006, Oracle. All rights reserved.

Table	Fields	Input
	Department code	If the host company is a normal (internal) company, enter the Department code. If it is an external company, enter the ICT Department code.
	Sup Lvl ID code	If the host company is a normal (internal) company, enter the supervisor level ID. If it is an external company, enter the ICT supervisor level ID.

Host Company Inputs

Not applicable.

Scenario A4: HTICT

Home Company Inputs

Not applicable.

Host Company Inputs

Table	Fields	Input
JOB	Action	Hire.
	Reason	Temporary intercompany transfer.
	Pay Group	If host (own) company is responsible for compensation, enter the pay group in which you want the employee. If not, enter a dummy pay group to indicate that the home (other) company is responsible for compensation.
	Employee Class	Hosting intercompany transfer.
JOB_JR	Intercompany Transfer Flag	Home company information.
	Business Unit (code)	If the home or host company is a normal (internal) company, enter the code. If not, leave this field blank.
	Company code	If the host company is a normal (internal) company, enter the code. If it is an external company, enter the ICT Company code.
	Department code	If the host company is a normal (internal) company, enter the Department code. If it is an external company, enter the ICT Department code.

Copyright © 1988-2006, Oracle. All rights reserved.

Table	Fields	Input
	Sup Lvl ID code	If the host company is a normal (internal) company, enter the supervisor level ID. If it is an external company, enter the ICT supervisor level ID.
	ICT Start Date	Actual start date of intercompany transfer.
	ICT End Date	Expected end date of ICT.

Scenario A5: Completion of HTICT

Home Company Inputs

Not applicable.

Host Company Inputs

Table	Fields	Input
JOB	Action	Termination.
	Reason	Completion of TICT.

Scenario A6: HPICT

Home Company Inputs

Not applicable.

Host Company Inputs

Table	Fields	Input
JOB	Action	Hire.
	Reason	Permanent intercompany transfer.
	Pay Group	Pay group in which you want this employee.
	Employee Class	Hosting intercompany transfer.
JOB_JR	Intercompany Transfer Flag	Home company information.

Copyright © 1988-2006, Oracle. All rights reserved.

Table	Fields	Input
	Business unit code	If the home or host company is a normal (internal) company, enter the code. If not, leave this field blank.
	Company code	If the host company is a normal (internal) company, enter the code. If it is an external company, enter the ICT Company code.
	Departmen: code	If the host company is a normal (internal) company, enter the Department code. If it is an external company, enter the ICT Department code.
	Sup Lvl ID code	If the host company is a normal (internal) company, enter the supervisor level ID. If it is an external company, enter the ICT supervisor level ID.

Multiple Companies Using a Single PeopleSoft Enterprise HRMS Database: Scenarios B1-6

This section discusses several scenarios for multiple companies that use a single human resources database.

Conditions:

- Both home and host companies use the same database and business unit, company, department ID, and supervisor level ID.
- Security settings make it impossible for either company to access the other's information.

Scenario B1: TICT

Home Company Inputs (Temporary Intercompany Transfer - TICT)

Table	Fields	Input
JOB	Action	Transfer.
	Reason	Temporary intercompany transfer.
	Department ID	Dummy ID that indicates temporary intercompany transfer.
	Pay Group	If home (own) company is responsible for compensation, no change occurs to the pay group. If not, enter a dummy pay group to indicate that the host (other) company is responsible for compensation. No processing is associated with dummy pay groups.

Copyright © 1988-2006, Oracle. All rights reserved.

Table	Fields	Input
	Job Indicator	Because the host company enters information by using concurrent jobs functionality, it is *Secondary.*
JOB_JR	Intercompany Transfer Flag	Host company information.
	Business unit code	Business unit to which the employee will be sent.
	Company code	Host company to which the employee will be sent.
	Department ID code	Host department in which the employee will be.
	Sup Lvl ID code	Supervisor level that employee will take in host company.
	ICT Start Date	Actual start date of intercompany transfer.
	ICT End Date	Expected end date of ICT.

Host Company Inputs (Hosting Temporary Intercompany Transfer - TICT)

Table	Fields	Input
JOB	Employee ID	If accessing through Add Employment Instance, use the same employee ID as the home company. If accessing through the Add a Person page, assign a new ID.
	Employee Record #	Employee ID is *1* or higher.
	Action	Hire.
	Reason	Temporary intercompany transfer.
	Company	Host company.
	Department ID	Host department in which the employee will be.

Copyright © 1988-2006, Oracle. All rights reserved.

Table	Fields	Input
	Pay Group	If host (own) company is responsible for compensation, the pay group in which you want this employee. If not, enter a dummy pay group to indicate that the home (other) company is responsible for compensation.
	Employee Class	Hosting intercompany transfer.
	Job Indicator	Primary.
JOB_JR	Intercompany Transfer Flag	Home company information.
	Business unit code	Employee's home business unit.
	Company code	Employee's home company.
	Department ID code	Employee's home department.
	ICT Start Date	Actual start date of intercompany transfer.
	ICT End Date	Expected end date of ICT.

Scenario B2: Completion of TICT

Home Company Inputs (Completion of Temporary Intercompany Transfer)

Table	Fields	Input
JOB	Action	Transfer.
	Reason	Completion of temporary intercompany transfer.
	Department ID	Home company department in which the employee will be.
	Pay Group	Pay group for home company that is responsible for compensation.
	Job Indicator	Primary.

Host Company Inputs (Completion of Hosting Temporary Intercompany Transfer)

Copyright © 1988-2006, Oracle. All rights reserved.

Table	Fields	Input
JOB	Action	Termination.
	Reason	Completion of temporary intercompany transfer.
	Job Indicator	Secondary.

Scenario B3: PICT

Home Company Inputs (Permanent Intercompany Transfer - PICT)

Table	Fields	Input
JOB	Action	Termination.
	Reason	Permanent intercompany transfer.
	Job Indicator	Because the host company entered information by using concurrent jobs functionality, it is *Secondary.*
JOB_JR	Intercompany Transfer Flag	Host company information.
	Business unit code	Business unit to which the employee is transferring.
	Company code	Host company to which the employee is transferring.
	Department ID code	Employee's host department.
	Sup Lvl ID code	Supervisor level that employee will have in host company.

Host Company Inputs (Hosting Permanent Intercompany Transfer - PICT)

Table	Fields	Input
JOB	Employee ID	If accessing through Add Employment Instance, use the same employee ID as the home company. If accessing through the Add a Person page, assign a new ID.
	Employee Record #	If accessing through the Concurrent Jobs page, the employee ID is *1* or higher.

Copyright © 1988-2006, Oracle. All rights reserved.

Table	Fields	Input
	Action	Hire.
	Reason	Permanent intercompany transfer.
	Pay Group	Regular host company pay group in which the employee will be.
	Employee Class	Hosting intercompany transfer.
	Job Indicator	Primary.
JOB_JR	Intercompany Transfer Flag	Home company information.
	Business Unit code	Business unit from which the employee comes.
	Company code	Home company to which the employee belongs.
	Department ID code	Home department in which the employee was.

Multiple Companies Using a Single HRMS Database: Scenarios C1-6

This section discusses several scenarios for multiple companies that use a single PeopleSoft Enterprise HRMS database.

Conditions:

- Both home and host companies use the same database and business unit, company, department ID, and supervisor level ID.
- Security settings allow all companies to access each other's information.

Scenario C1: TICT

Home Company Inputs (Temporary Intercompany Transfer - TICT)

Table	Fields	Input
JOB	Action	Transfer.
	Reason	Temporary intercompany transfer.
	Department ID	Dummy ID that indicates temporary intercompany transfer.

Copyright © 1988-2006, Oracle. All rights reserved.

Table	Fields	Input
	Pay Group	If home (own) company is responsible for compensation, no change occurs to the pay group. If not, enter a dummy pay group to indicate that the host (other) company is responsible for compensation.
	Job Indicator	Because the host company enters information by using concurrent jobs functionality, it is *Secondary.*
JOB_JR	Intercompany Transfer Flag	Host company information.
	ICT Start Date	Actual start date of intercompany transfer.
	ICT End Date	Expected end date of ICT.

Host Company Inputs (Hosting Temporary Intercompany Transfer - TICT)

Table	Fields	Input
JOB	Employee ID	If accessing through Add Employment Instance, use the same employee ID as the home company. If accessing through the Add a Person page, assign a new ID.
	Employee Record #	If accessing through the Concurrent Jobs page, the employee ID is *1* or higher.
	Action	Hire.
	Reason	Temporary intercompany transfer.
	Company	Host company.
	Department ID	Host department in which the employee will be.
	Pay Group	If host (own) company is responsible for compensation, the pay group in which you want this employee. If not, enter a dummy pay group to indicate that the home (other) company is responsible for compensation.
	Employee Class	Hosting intercompany transfer.

Copyright © 1988-2006, Oracle. All rights reserved.

Table	Fields	Input
	Job Indicator	Primary.
JOB_JR	Intercompany Transfer Flag	Home company information.
	ICT Start Date	Actual start date of intercompany transfer.
	ICT End Date	Expected end date of ICT.

Scenario C2: Completion of TICT

See Scenario B2: Completion of Temporary Intercompany transfer.

Scenario C3: PICT

Home Company Inputs (Permanent Intercompany Transfer - PICT)

Table	Fields	Input
JOB	Action	Termination.
	Reason	Permanent intercompany transfer.
	Job Indicator	Because the host company entered information by using concurrent jobs functionality, it is *Secondary.*
JOB_JR	Intercompany Transfer Flag	Host company information.

Host Company Inputs (Hosting Permanent Intercompany Transfer - PICT)

Table	Fields	Input
JOB	Employee ID	If accessing through Add Employment Instance, use the same employee ID as the home company. If accessing through the Add a Person page, assign a new ID.
	Employee Record #	If accessing through the Concurrent Jobs page, the employee ID is *1* or higher.
	Action	Hire.

Copyright © 1988-2006, Oracle. All rights reserved.

Table	Fields	Input
	Reason	Permanent intercompany transfer.
	Pay Group	Regular host company pay group in which the employee will be.
	Employee Class	Hosting intercompany transfer.
	Job Indicator	Primary.
JOB_JR	Intercompany Transfer Flag	Home company information.

Working with Search Page Security

This section discusses how department security (Search Page Security on PERS_SRCH_COR and EMPLMT_SRCH_COR) works when you use the system's Multiple Jobs functionality.

Note. You can set up this security in many different ways. Your specific business requirements determine how you set up yours. This section describes one example of how you may set up your security.

This information makes the following assumptions:

- You want to manage two companies in one database: company A and company B, where company B is a subsidiary of company A.
- The entire organization of company A belongs to business unit A (BUA), and the entire organization of company B belongs to business unit B (BUB).
- You have defined two setIDs: SIDA and SIDB for companies A and B, respectively.
- Neither company's workers have meaningful employee IDs; that is, the ID does not identify the company.

  For example, a person with employee ID 1002 may belong to company B, whereas workers with employee IDs 1001 and 1003 belong to company A.
- This security has two users: USR1 and USR2.

  USR1 has the right to access the sales department of company A, and USR2 has the right to access the sales department of company B.

Following these assumptions, the next table represents the job rows for the person with employee ID 1001, who:

- Was originally hired by company A.
- Went on a temporary intercompany transfer to company B (scenario B1).
- Returned to company A (scenario B3).
- Went on permanent intercompany transfer to company B (scenario B6).

 Copyright © 1988-2006, Oracle. All rights reserved.

Key: In this table, Empl Rec# = Employment Record Number, Co. = Company, ICT = InterCompany Transfer, A/R = Action/Reason, D = Department, and J = Job Indicator.

Event	Empl Rec#0	Empl Rec#1
1. Hired by company A	A/R − Hired Co. − A D − Sales J − Primary	NA
2. Temporary ICT to company B	A/R − Transfer/ICT Co. − A D − Human Resources J − Secondary	A/R − Hire/Temporary ICT Co. − B D − Sales J − Primary
3. Returned to company A	A/R −Transfer/Completion of Temporary ICT Co. − A D − Sales J − Primary	A/R −Termination/Completion of Temporary ICT Co. − B D − Sales J − Secondary
4. Permanent ICT to company B 4a. Terminated from company A 4b. Hired (or rehired) by company B	A/R − Termination / Permanent ICT Co. − A A/R − Hired or rehired / Permanent ICT Co. − B D − Sales J − Primary	NA

This example shows how departmental security (search page security) works for users who have security right access to a department. Users can do one of the following:

- Access all employees whose current jobs belong to that department when PERS_SRCH_GBL is used as the search table.
- Access the particular record numbers for employees whose current job is in the department when EMPLMT_SRCH_GBL is used as the search table.

This table shows which users have access to which data at each of the four events described for employee 1001:

Copyright © 1988-2006, Oracle. All rights reserved.

Event	Personal Data	Empl Rec#0 Data	Empl Rec#1 Data
	PERS_SRCH_GBL	EMPLMT_SRCH_GBL	EMPLMT_SRCH_GBL
1. Hired by company A	USR1	USR1	NA
2. Temporary ICT to company B	USR1 and USR2	USR1	USR2
3. Returned to company A	USR1 and USR2	USR1	USR2
4a. Permanent ICT to company B 4b. Hired or rehired by company B	USR1 and USR2 USR2	USR1 USR2	USR2 USR2

Running the Intercompany Transfer Report

This section lists the page used to run the JPN Completion of IC Transfer report.

Page Used to Run the Intercompany Transfer Report

Page Name	Object Name	Navigation	Usage
Completion of IC Transfer JPN	RUNCTL_PER065_JPN	Workforce Administration, Job Information, Reports, Completion of IC Transfer JPN	Run the JPN Completion of IC Transfer report (PER065JP), which lists employees on temporary intercompany transfer. The home company uses this report to confirm employees who are anticipated to return from temporary intercompany transfer.

Copyright © 1988-2006, Oracle. All rights reserved.

CHAPTER 14

(JPN) Mass Organization Change

This chapter provides an overview of mass transfers in Japan and discusses how to:

- Change plans for restructuring an organization.
- Align employee placement plans with the new organization structure.
- Finalize organization and employee placement plans.

Understanding Mass Organization Change

Japanese companies change organizational structure periodically. Consequently, employees are transferred to new roles and departments within the revised structure. This change is referred to as mass period transfers (*teiki ido*). With rapid changes in the business environment, organizational changes and mass transfers play an integral part for businesses in Japan and take place in short cycles.

Job rotation is viewed as an integral part of employee development in Japan. Human resources (HR) departments intentionally transfer some employees to multiple departments over a period of time. This practice is aimed at developing generalists who are knowledgeable about several jobs within the company. It also provides employees more experience and a broader vision of the company. The period of service in a department is often the selection criterion for job rotation. Employees who are identified as transferable are called transfer candidate employees.

Many companies in Japan employ a split HR organizational structure made up of division HR and corporate HR. Corporate HR is an HR department located in the main company headquarters of a large company or group of companies. Division HR departments are HR departments within a business unit or division. The division HR departments report to the corporate HR department (and the general manager of the business unit, subsidiary companies, and so on).

The division HR department formulates and implements activities related to changes in organizational strategy and employee placement at the departmental level. When division HR finishes its work, it reports to corporate HR. Corporate HR then coordinates and adjusts activities and placements among departments based on company strategy.

Tamatsuki Placement

The Japanese word *tamatsuki* combines the words ball (*tama*) and hit (*tsuku*) and means *billiards* in Japanese. *Tamatsuki* placement begins when an employee is assigned to a newly created post. The existing post is vacated and is available to be filled.

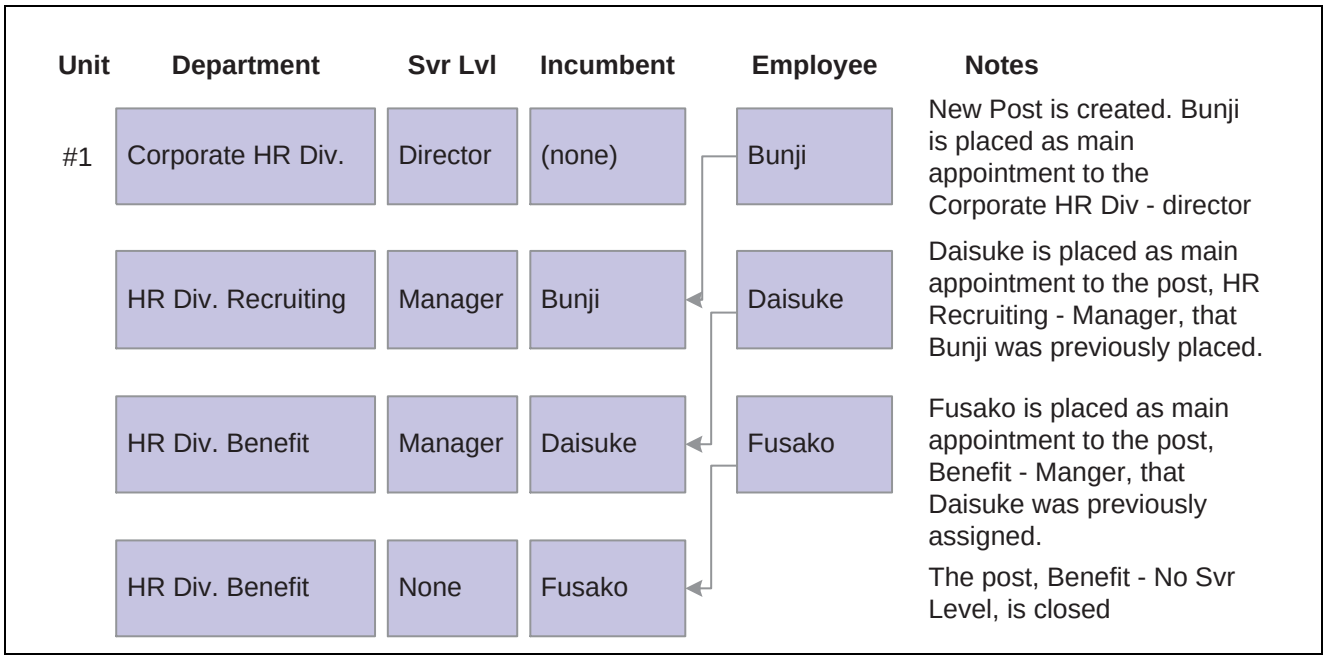
Note. A post is equivalent to a supervisory level role (*yakushoku*) in a department. It is different from a position, which is maintained in the Position Management feature.

Copyright © 1988-2006, Oracle. All rights reserved.

When restructuring an organization, *Tamatsuki* placement is usually conducted along the same job level. *Tamatsuki* placement can also occur when an employee has requested a transfer. Job rotation for higher level management positions are also done across the same job level, which starts a job transfer chain of events.

In the following example, Bunji is assigned a new post, Corporate HR Division Director, and his previous post becomes available. Other employees are then assigned to similar posts at the same level by the cascading effect of a person moving from one post to another and leaving the existing post vacant. Daisuke is assigned to Bunji's previous post, Fusako is assigned to Daisuke's previous post, and Fusako's previous post is closed.

This is an example of *tamatsuki* placement:



Example of *Tamatsuki* placement

Note. This feature does not support transfer between business units as table sets may differ from one business unit to the next.

Changing Plans for Restructuring an Organization

This section provides an overview of change plans for restructuring an organization and discusses how to:

- Create an Organization Plan.
- Specify Headcount Plan by department.
- View the Headcount Plan listing.

Understanding Change Plans for Restructuring An Organization

To plan a new organizational structure, you enter information about the new structure in the system. This information includes the department hierarchy and size by supervisor level, job code, and grade. You can store multiple structures under different names. After entering the information for a new plan, you verify the information using a visual chart.

Copyright © 1988-2006, Oracle. All rights reserved.

Organizational Structure

You build the existing and planned organizational structures using PeopleSoft Tree Manager. Tree Manager provides a graphical user interface that enables you to create organizational structures visually using drag-and-drop functionality. To create a new organizational structure using Tree Manager, copy the existing tree for the current organizational structure and save it by a different name.

Note. When using an initial tree structure, Oracle recommends that customers create a tree based on the DEPT_SECURITY tree but with a different name. Then, after the tree is approved, rename the tree DEPT_SECURITY with a new effective date.

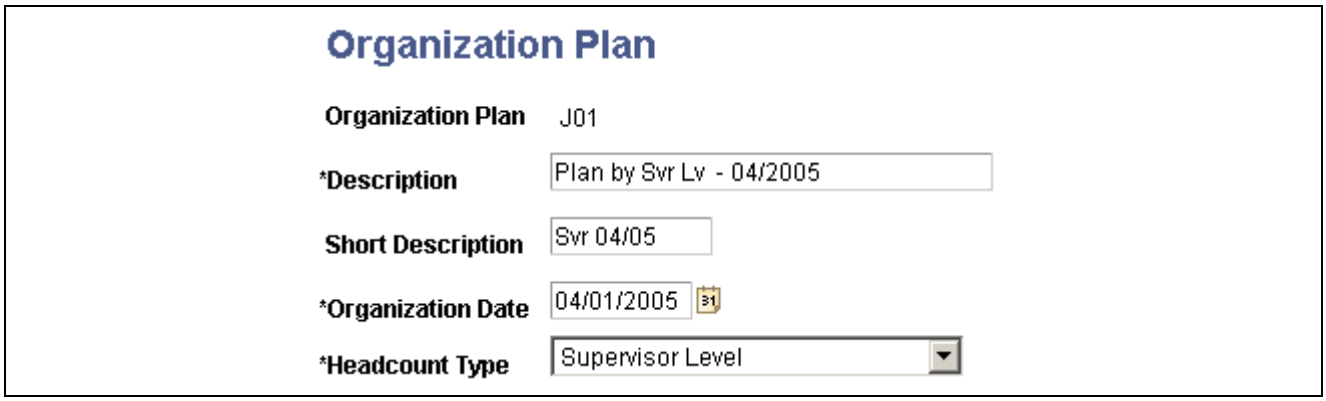
Pages Used to Change Plans for Restructuring an Organization

Page Name	Object Name	Navigation	Usage
Tree Manager	PSTREEMGR	• Tree Manager, Tree Manager • Tree Manager, Tree Manager	Base the new tree on the existing organization structure's tree and copy it or create a tree for the new organization structure. Add departments using Tree Manager functionality.
Organization Plan	IDO_ORG_PLAN_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Organization Plan	Set up *Ido* organization plans.
Headcount Plan by Department	IDO_HC_DEPT_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Headcount Plan by Department	Specify head count targets by department.
Headcount Plan Listing	RC_IDO_HC_RPT_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Headcount Plan Listing	Use this page to run a report that compares the head count goals established for departments with the simulated result of the organization plan.

Creating an Organization Plan

Access the Organization Plan page.

Copyright © 1988-2006, Oracle. All rights reserved.



Organization Plan page

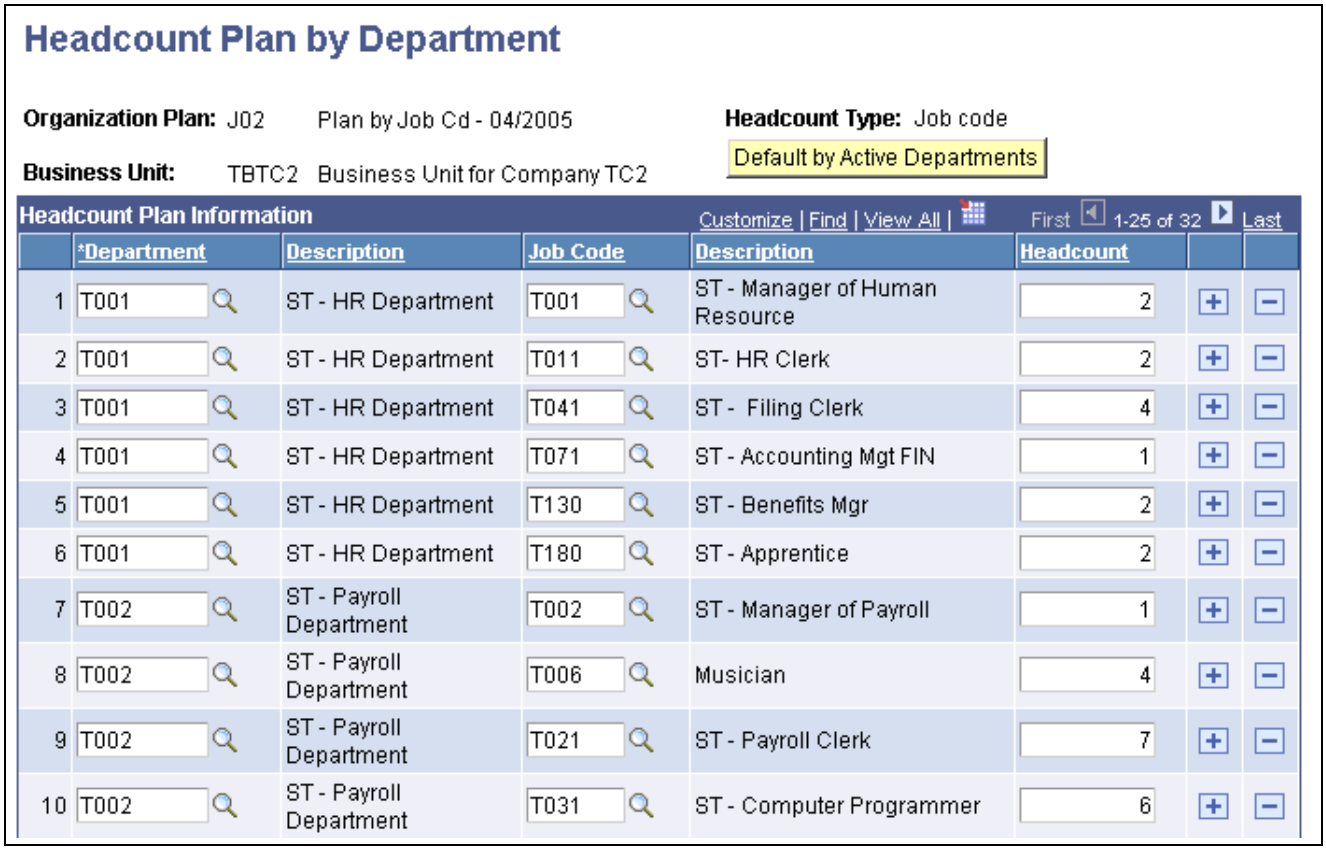
An Organization Plan enables you to track several different ways of reorganizing the company. After running reports modeling the different options, you can select one of the Organization Plans as the *official* plan and insert it into the Job record.

Organization Date Enter the date from which the new organization plan will be effective.

Headcount Type Select *Job Code, Sal Admin Plan/Grade,* or *Supervisor Level.*

Specify Headcount Plan by Department

Access the Headcount Plan by Department page.



Headcount Plan by Department page

Copyright © 1988-2006, Oracle. All rights reserved.

Use this page to track goals by department. For example, if you have two people in department 100 and you want four people after the reorganization is completed, you enter the number *4* for department 100 on this page. You then perform your transfers. After your reorganization is finished (but before you insert it into the Job record), run the Headcount Plan Listing (PER071JP.SQR) report to see if your transfers have increased the headcount in the department from two to four.

Default by Active Departments Click the Default by Active Departments button to fill the Headcount Plan Information grid with data from the active departments.

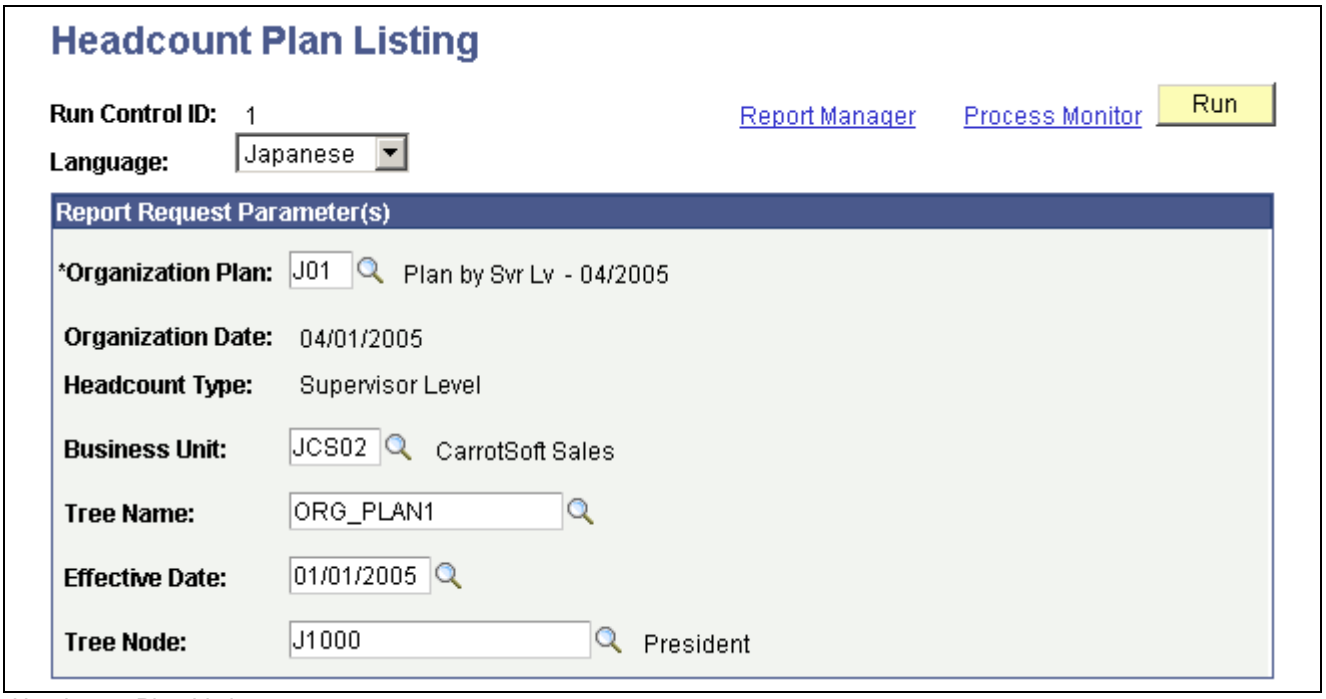
As well as using the Default by Active Departments button, you can enter the head count for each department.

Note. This page provides a lower level of detail than the Headcount by Department page. It also breaks down this information by supervisor level, job code, and grade. If you currently had a head count of two in department 100, one with a supervisor level of S10 and one with a supervisor level of S20, you could change the settings to two for S10 and two for S20, resulting in a projected total head count of four for the department.

Note. If you do not want to use head count planning, then do not enter any data on the Headcount Plan by Department page for that organization plan.

View the Headcount Plan Listing

Access the Headcount Plan Listing page.



Headcount Plan Listing page

Enter values on this page that will be used to compare the head count goals established for departments with the simulated result of the organization plan.

Copyright © 1988-2006, Oracle. All rights reserved.

Aligning Employee Placement Plans with the New Organization Structure

This section provides an overview of employee placement plans and discusses how to:

- List *Ido*.
- Transfer entries by department.
- Transfer entries by using trees.
- Select *tamatsuki* transfer candidates.
- Enter *tamatsuki* transfers.
- List *tamatsuki* placements.
- Transfer *tamatsuki* data to the job record.
- Delete and maintain transfer data.

Understanding Employee Placement Plans

Multiple ways exist to create employee placement plans. The first way is to use the Transfer Entry by Department page. With this method, you enter the placement by department. The second method is to use the Transfer Entry with Trees page. You see the current organization structure and placement, and you enter plans.

These methods are similar in that you create an *Ido* candidate listing, use the Transfer Entry by Department or Transfer Entry with Trees pages, and then use the Transfer Data Maintenance page, if required. You can then check, undo, and adjust placements using the Transfer Data Maintenance page.

The third method is the *Tamatsuki* Transfer method to enter placements. The *Tamatsuki* Transfer is an optional step. Using this method, you create an *Ido* candidate listing, use the Transfer Entry by Department or Transfer Entry with Trees pages, use the *Tamatsuki* Transfer Candidate Entry, *Tamatsuki* Transfer Entry, *Tamatsuki* Placement Check List, and *Tamatsuki* to Transfer Record pages, and then you use the Transfer Data Maintenance page, if required.

Security setup does not prevent users from transferring employees. Consequently, limit access to the Mass Employee Transfer page to trusted users only. Security access is invoked whenever a user clicks the View links on the Transfer Entry by Department and Transfer Entry by Tree pages.

Copyright © 1988-2006, Oracle. All rights reserved.

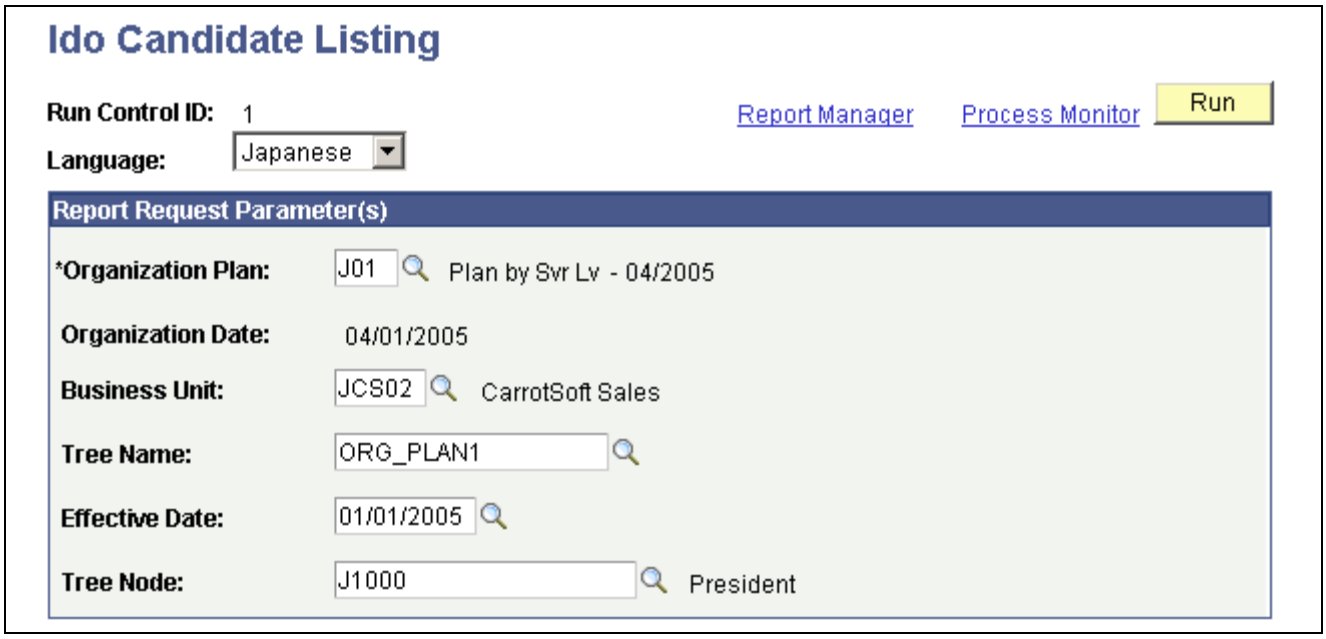
Pages Used For Employee Placement Plans

Page Name	Object Name	Navigation	Usage
Ido Candidate Listing	RC_IDO_EE_LIST_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Ido Candidate Listing	Run a report that lists current information for employees. Use it to help plan future organizational changes.
Transfer Entry by Department	IDO_MASS_TRANS_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Transfer Entry by Dept	Transfer multiple employees from one department to another.
Transfer Entry with Trees	IDO_XFR_TREE_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Transfer Entry with Trees	Transfer employees between departments using trees.
Tamatsuki Transfer Candidate Entry	IDO_CANDIDATE_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Tamatsuki Transfer Candidates	Specify a list of *tamatsuki* candidates.
Tamatsuki Transfer Entry	IDO_TAMATSUKI_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Tamatsuki Transfer Entry	Assign *tamatsuki* candidates to posts.
Tamatsuki Placement Check List	RC_IDO_TAM_CL_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Tamatsuki Placement Check List	Summarize the *tamatsuki* transfers that are planned.
Tamatsuki to Transfer Record	RC_IDO_TAM_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Tamatsuki to Transfer Record	Copy data from the record IDO_TAMATSU_JPN to the record IDO_FUT_UPD_JPN.
Transfer Data Maintenance	IDO_MAINT_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Transfer Data Maintenance	Maintain the Future Update record.

Listing Ido Candidates

Access the Ido Candidate Listing page.

Copyright © 1988-2006, Oracle. All rights reserved.



Ido Candidate Listing page

Use this page to run a report to determine which employees are subject to a reorganization or *tamatsuki* placement. The report is in comma delimited file (CSV) format so that you can open the file as a spreadsheet.

Transferring Entries by Department

Access the Transfer Entry by Department page.



Transfer Entry by Department page (1 of 2)

Copyright © 1988-2006, Oracle. All rights reserved.



Transfer Entry by Department page (2 of 2)

Load — Click the Load button to list the employees for a particular business unit and department who are available for transfer to another department.

Proc (Process) — The Proc check box is selected by default. When it is selected, employees are transferred to another department or have other job-related information changed. The changes are applied when the page is saved.

For example, department 100 is being closed. Half the employees in that department will be assigned to department 110, and the other half will be assigned to department 120. First, open this page and display all employees in department 100. Then enter a transfer to department 110 in the Change the Following Fields group box and clear the Proc check box for those employees who should be transferred to department 120. After saving the page, enter a transfer for department 120, clear the employees in department 110, reselect the employees to be transferred to department 120, and save the page again.

Action — Select the action to use for inserting a new Job row.

Reason — Select a code to specify why the value is being changed.

Effective Date — Enter a date to specify when the change becomes effective.

Business Unit, Department, Location Code, Supervisor Level, Job Code — Enter values in these fields to specify new information for the employees selected.

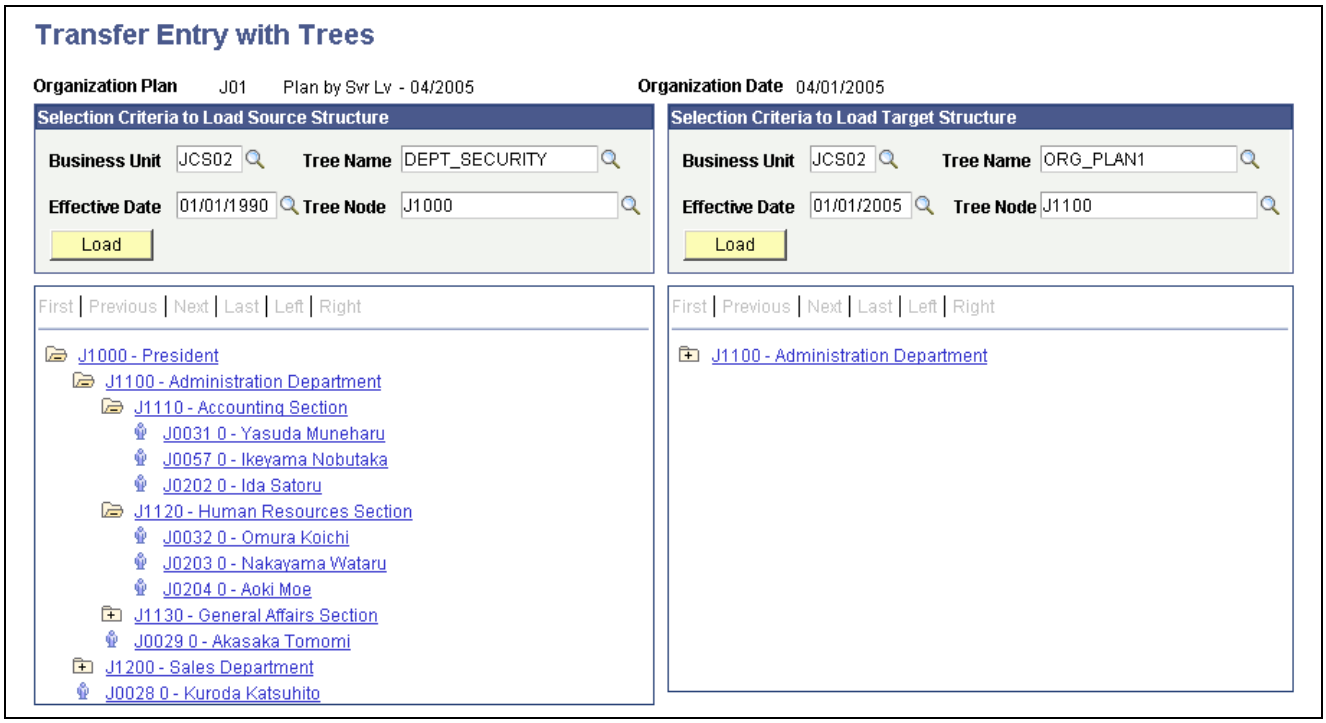
Note. These fields should be left blank if a user does not want to change the data for the employees. For example, if you want to move employees from department 100 to 110 but want them to keep their old job codes, you would leave the Jobcode field blank on the page.

On the other hand, if you want to assign all the employees to job code J200 and change their departments, you would enter *J200* in the Jobcode field.

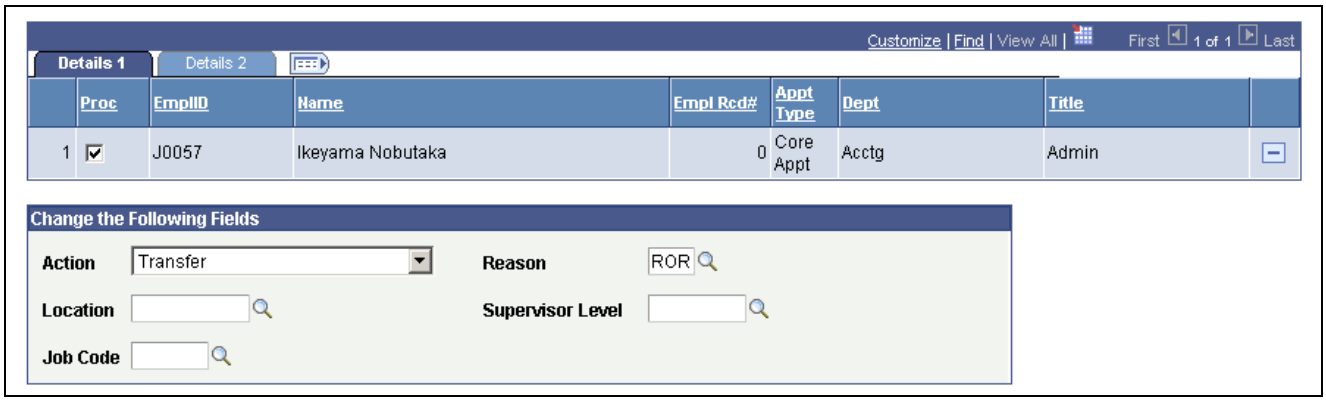
Transferring Entries by Using Trees

Access the Transfer Entry with Trees page.

Copyright © 1988-2006, Oracle. All rights reserved.



Transfer Entry with Trees page (1 of 2)



Transfer Entry with Trees page (2 of 2)

Note. Before using this page, consider and decide on each employee's transfer data, including locations, supervisor levels, job codes, and actions and reasons.

Enter values for the Business Unit, Tree Name, Effective Date,and Tree Node fields in both the Selection Criteria to Load Source Structure group box and the Selection Criteria to Load Target Structure group box. Click the respective Load buttons for each section.

To transfer entries by using trees:

1. Select an employee to be transferred from the Selection Criteria to Load Source Structure tree, and click the Department folder to list all employees in the department.
2. Click the employee's name to display information on the Details 1 and Details 2 grids.
3. View information in the Details 1 and Details 2 grids, as necessary.
4. Enter values in the Action and Reason fields.

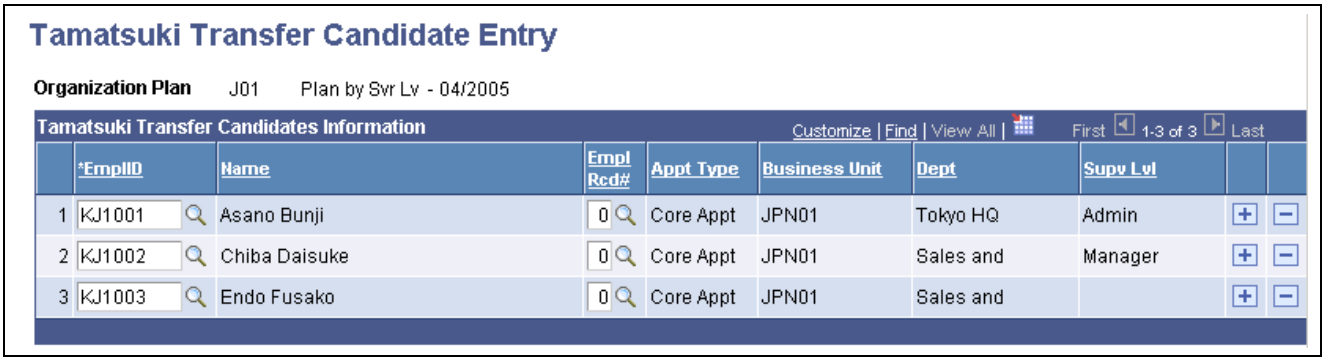
   The Location, Supervisor Level, and Jobcode fields are optional.

Copyright © 1988-2006, Oracle. All rights reserved.

5. Click a new department for the employee in the Selection Criteria to Load Target Structure tree.

Selecting *Tamatsuki* Transfer Candidates

Access the Tamatsuki Transfer Candidate Entry page.



Tamatsuki Transfer Candidate Entry page

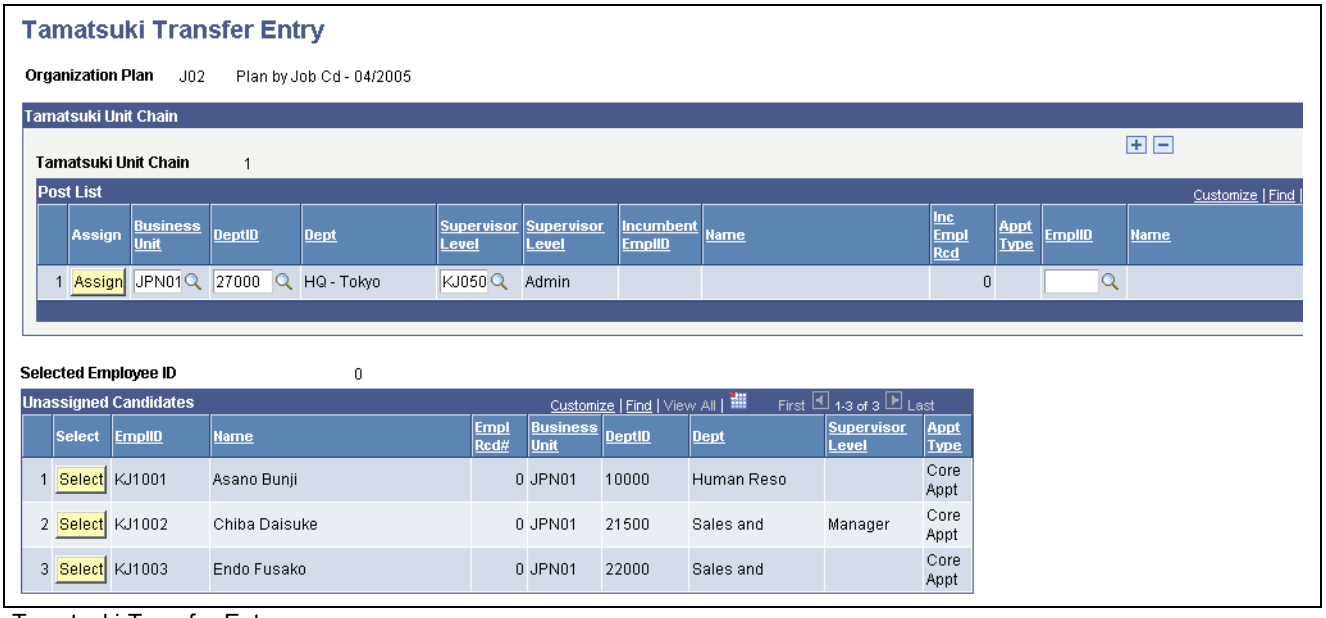
Enter employees who are potentially candidates for transfer using the *Tamatsuki* transfer method.

Note. Use this page to begin the *Tamatsuki* process. Select employee IDs that will appear on other pages that are part of the *tamatsuki* functionality.

Note. Once employees have been assigned as a *tamatsuki* transfer candidate, they cannot be transferred using the Transfer Entry by Department or Transfer Entry by Tree pages.

Entering *Tamatsuki* Transfers

Access the Tamatsuki Transfer Entry page.



Tamatsuki Transfer Entry page

Copyright © 1988-2006, Oracle. All rights reserved.

Select In the Unassigned Candidates group box, click the Select button next to the row of the employee that will be assigned to a post. The Selected Employee ID field shows the currently selected employee.

Business Unit This field can only be entered for the first row. The next rows are inserted automatically based on the selected employee's post.

DeptID This field can only be entered for the first row. The next rows are inserted automatically based on the selected employee's post.

Supervisor Level This field can only be entered for the first row. The next rows are inserted automatically based on the selected employee's post.

Ido Action *Open Post* is the default value when you insert a new row. When an employee is placed in an open post, the system automatically inserts a new row so that another employee can be assigned to the open (vacated) post. Possible values are:

- *Assigned* status indicates that the post is filled.
- *Close Post* status indicates that a post is terminated.
- *Create AA* status is used to assign an employee an additional appointment.

  Two circumstances can result in an additional appointment. The first is a post that was a main appointment and then changed to an additional appointment. The second is a post that is an additional appointment and remains an additional appointment.

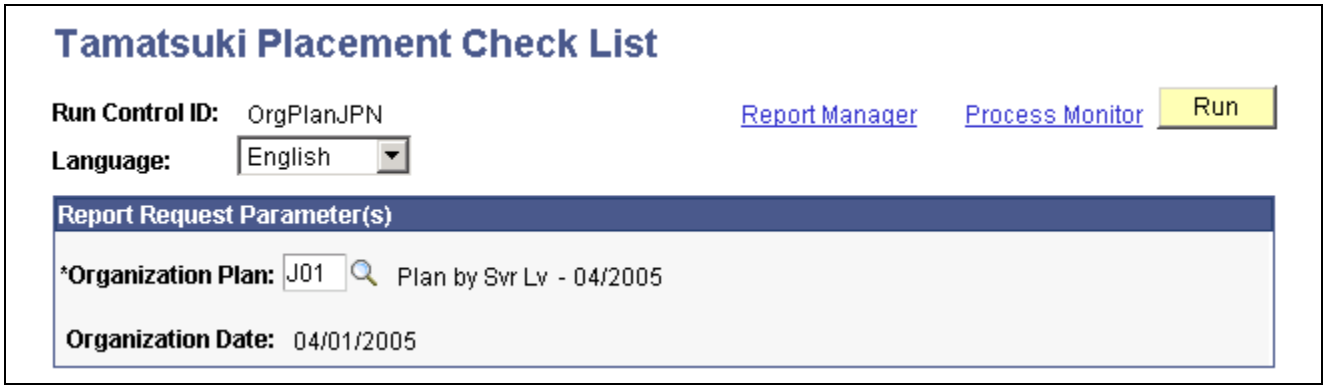
  Note. If the Additional Appointment Enabled field on the Installation - Country Specific page is not selected, additional appointment related data does not appear on this page.

Assign Use this button to assign the selected employee to the open post. When no one is selected from the unassigned candidate grid, the selected employee's post is entered on the first row.

Note. When the user needs to change the middle of the *Tamatsuki* Chain (Unit), the user should delete the whole unit and enter information from the first row.

Listing *Tamatsuki* Placements

Access the Tamatsuki Placement Check List page.



Tamatsuki Placement Check List page

Copyright © 1988-2006, Oracle. All rights reserved.

Use this report to confirm that placements align with the organizational plan and verify that candidates have been placed in the correct posts or that the posts have been assigned the correct candidates.

Transferring *Tamatsuki* Data to the Job Record

Access the Tamatsuki to Transfer Record page.



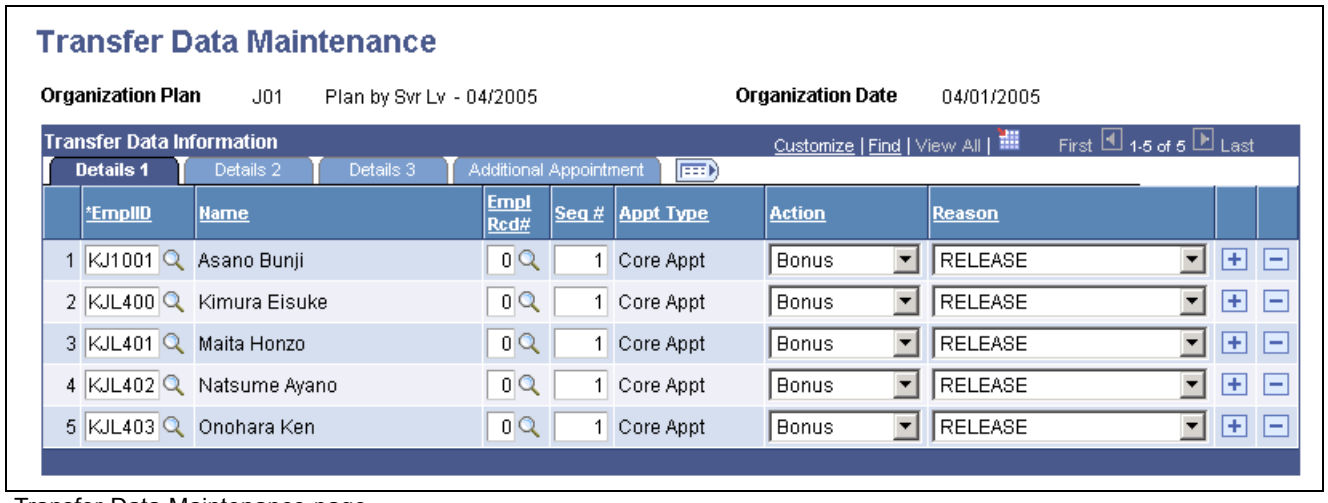
Tamatsuki to Transfer Record page

Tamatsuki data is tracked by the IDO_TAMATSU_JPN record. This process moves the data to the IDO_FUT_UPD_JPN record. The Mass Employee Transfer process takes the data from the IDO_FUT_UPD_JPN record and inserts it into the Job record.

Note. If the *Tamatsuki* to Transfer Record process is never run, the Mass Employee Transfer process will not insert the *tamatsuki* post changes into the Job record.

Deleting and Maintaining Transfer Data

Access the Transfer Data Maintenance page.



Transfer Data Maintenance page

Copyright © 1988-2006, Oracle. All rights reserved.

Note. Use caution in modifying information on this page because few validations are made here. The primary purpose of the page is to delete unwanted transfers. It is not intended for data entry that you make on other pages in the *Tamatsuki* process. If you perform actions beyond deleting rows on this page, be careful to validate your entries.

Finalizing Organization and Employee Placement Plans

This section provides an overview of finalizing organization and employee placement plans and discusses how to:

- Create an Organization Plan checklist.
- Create a Headcount Plan listing.
- Run the Future Employee Assignment List.
- Run the Transfers After Organization Change query.
- Run the Ido Employee Listing report.
- Run the Mass Employee Transfer process.
- Clean up temporary data.

Understanding Finalizing Organization and Employee Placement Plans

In order to finalize organization and employee placement plans, a number of checks should be run to ensure that the intended structure is correct and that changes to the organization, employees, and departments are acceptable. HR administrators should also review the Ido Employee Listing and Future Employee Assignment List before the Mass Employee Transfer process.

Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used For Finalizing Organization and Employee Placement Plans

Page Name	Object Name	Navigation	Usage
Organization Plan Checklist	RC_IDO_AUD1_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Org Plan Checklist Click the Run button on the Process Scheduler Request page and select the Employees in Inactive Department link or the Open Post Checklist link.	• Run the Employees in Inactive Department report PER069JP) to list employees who will be in inactive departments. • Run the Open Post Checklist report (PER070JP) to list the Open Post Checklist.
Headcount Plan Listing	RC_IDO_HC_RPT_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Headcount Plan Listing	Use this report to list the head count of the new organization structure.
Future Employee Assignment List	RC_IDO_FUT_ASN_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Future Empl Assignment List	Use this report to simulate the way that the organization would look at an employee level if the selected organization plan is processed.
Query Viewer	QUERY_VIEWER_SRCH	Reporting Tools, Query, Query Viewer	Run the HR_TRANSAFTERORGCHG query to view a list of transferred employees that are affected after the organization change.
Ido Employee Listing	RC_IDO_AUD2_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Ido Employee Listing	This report summarizes the changes that will be made if the selected organization plan is processed.
Mass Employee Transfer	RC_IDO_MASS_TR_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Mass Employee Transfer	Run this process to copy data from the Update Transfer Data table and insert it into the Job record.
Temporary Data Cleanup	RC_IDO_CLEAN_JPN	Workforce Administration, Collective Processes, Mass Organization Change JPN, Temporary Data Cleanup	Run this process to delete data associated with an organization plan.

Creating an Organization Plan Checklist

Access the Organization Plan Checklist page.

Copyright © 1988-2006, Oracle. All rights reserved.



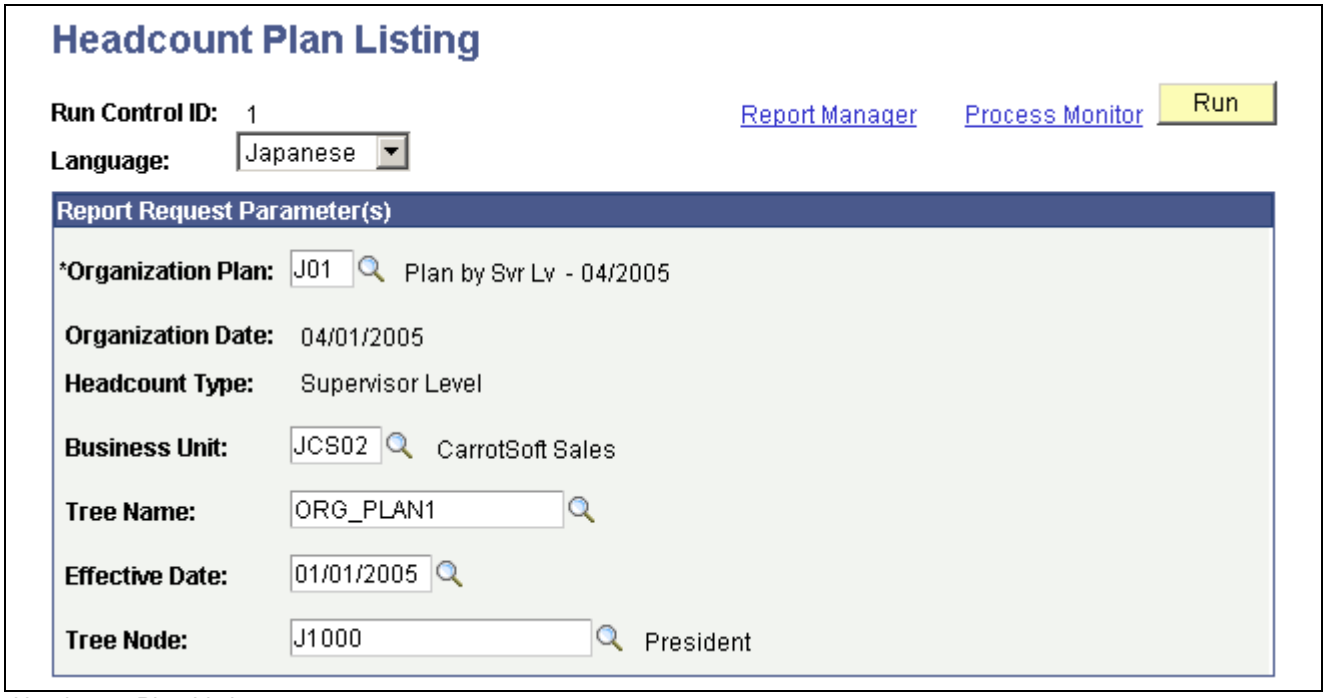
Organization Plan Checklist page

Use this page to run the Employees in Inactive Department (PER069JP) report and the Open Post Checklist report (PER070JP).

The purpose of the Open Post Checklist report is to list cases where the actual head count in a department (after simulating the insert into the Job record) does not match the head count goals entered in the Headcount Plan by Department page. The Open Post checklist report only lists head count when the goal and actual numbers do not match.

Creating a Headcount Plan Listing

Access the Headcount Plan Listing page.



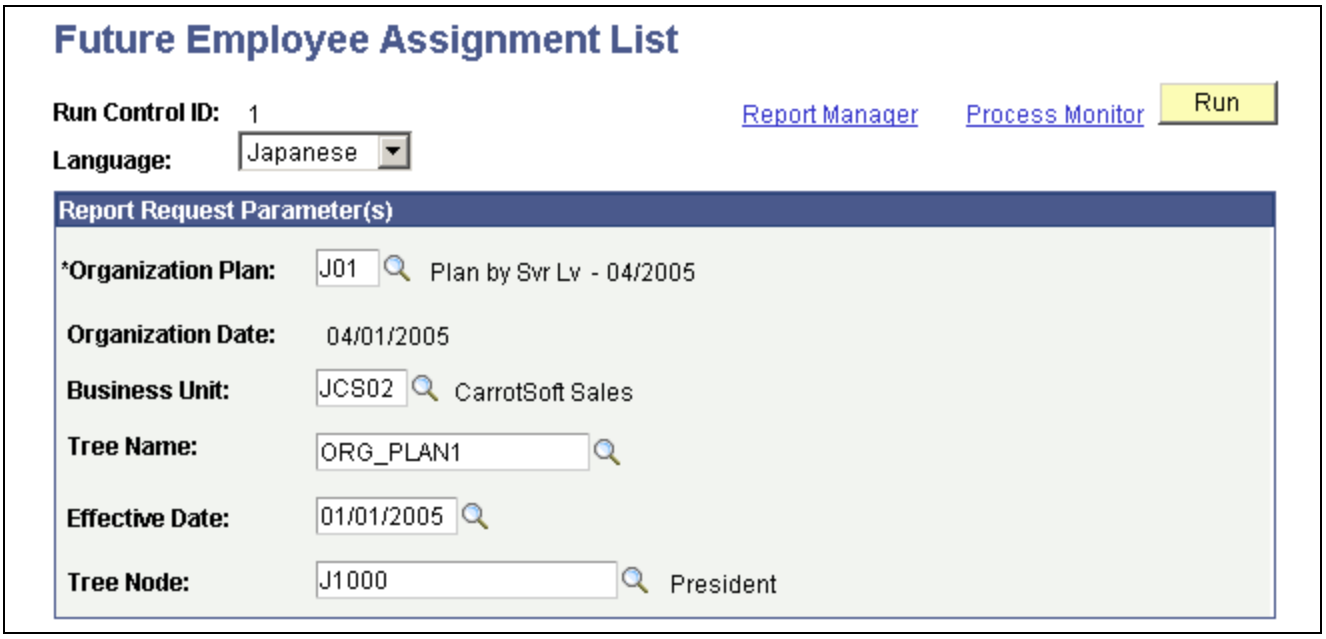
Headcount Plan Listing page

Use the Actual Headcount Report to list the actual headcount of an organization plan. This report is the same as the Open Post Checklist report except that it lists both matching and unmatching head count numbers.

Copyright © 1988-2006, Oracle. All rights reserved.

Running the Future Employee Assignment List

Access the Future Employee Assignment List page.



Future Employee Assignment List page

Use this report to simulate the way that the organization would look at an employee level if the organization plan is processed.

Running the Transfers After Organization Change Query

Access Query Viewer and run the HR_TRANSAFTERORGCHG query.

The purpose of this query is to list employees with an effective date greater than the Organization Plan effective date. Employees listed on this report will require manual intervention after the Mass Employee Transfer process has been run.

For example, an employee has the following job data:

Date	Action	DeptID
January 1, 2003	HIR	100
February 1, 2004	PRO	200

You decide to use the Ido functionality to transfer an employee to department 300 effective on January 1, 2004, before the February 1 date that already exists in the employee's record. Effective February 1, this transfer will be canceled due to the future-dated row. In most cases, you will want to update the February 1, 2004 date to reflect the new department, which is 300. This query enables you to detect when this type of situation occurs and manually update employees records after you process the Ido job insert.

Running the Ido Employee Listing Report

Access the Ido Employee Listing page.

Copyright © 1988-2006, Oracle. All rights reserved.



Ido Employee Listing page

This report summarizes the changes that will be made if the organization plan is processed. The report is in CSV format so that you can open the file as a spreadsheet.

Running the Mass Employee Transfer Process

Access the Mass Employee Transfer page.



Mass Employee Transfer page

After you decide which organization plan to use, run the batch Mass Employee Transfer process. This process updates the database with the new the organization plan. It copies data from the Update Transfer Data table and inserts it into the Job record.

If multiple job rows exist with the same effective date, the same effective date is used, however the effective sequence is incremented. For example, if you want to insert a row into the Job table effective January 1, 2004, but a January 1, 2004 row already exists (with an effective sequence of *0*), the process will insert the new row with an effective sequence of *1*.

Cleaning Up Temporary Data

Access the Temporary Data Cleanup page.

Copyright © 1988-2006, Oracle. All rights reserved.



Temporary Data Cleanup page

Run this process after the Mass Employee Transfer process completes successfully. After the employees are reorganized and their data inserted into the Job record, there is no longer a need to keep the planning information in the database. For the organization plan selected, this process deletes rows from these tables:

- IDO_FUT_UPD_JPN
- IDO_TAMATSU_JPN
- IDO_CANDIDT_JPN
- IDO_HC_DEPT_JPN

Copyright © 1988-2006, Oracle. All rights reserved.

Copyright © 1988-2006, Oracle. All rights reserved.

CHAPTER 15

Updating Person and Job Information

This chapter provides an overview of the process of updating person and job information and discusses how to:

- Change personal data.
- Change job data.
- Locate personnel records.
- Change and delete IDs.
- Delete Employment Record Numbers (ERNs).
- Update personal data.
- Run personal data reports.
- Update job data.
- Update military ranks.
- Update organizational instance and assignment relationships.
- Update salary information.
- Refresh compensation.
- Run job data reports.
- View a summary of all job records.
- Refresh tables to facilitate reporting.
- Run database audits.

See Also

Chapter 6, "Increasing the Workforce," page 133

Understanding the Process of Updating Person and Job Information

A person's history with your organization may involve many job changes, such as promotions, leaves of absence, layoffs, retirement, pay rate changes, and so on. To maintain a complete history of the person's tenure, enter these changes regularly in PeopleSoft Enterprise Human Resources.

Copyright © 1988-2006, Oracle. All rights reserved.

Updating Job Information When You've Implemented PeopleSoft Enterprise Payroll for North America

When you modify job data that affects payroll, the system marks payline records for recalculation where needed. When payroll is recalculated, the payroll system uses the new information.

Updating Job Information When You've Implemented PeopleSoft Enterprise Benefits Administration

When you modify job or employment data that affects benefits, the system sets the flags that control event maintenance to indicate that a change has occurred. Then, during the next event maintenance process, the system processes the event.

Changing Personal Data

To update personal information without changing job information, use the Modify a Person component (PERSONAL_DATA), which contains the same pages that you use to add personal data records with the exception of the Organizational Relationship page:

Component	Pages in the Group	Usage
Personal Data Workforce Administration, Personal Information, Modify a Person Workforce Administration, Personal Information, Biographical, Modify a Person Stock, Modify a Person Enterprise Learning, Modify a Person	Biographical Details (PERSONAL_DATA1) Contact Information (PERSONAL_DATA2) Regional (PERSONAL_DATA3)	Update a person's personal information without changing job information.

See Also

Chapter 15, "Updating Person and Job Information," Updating Personal Data, page 547

Chapter 5, "Adding a Person in PeopleSoft Human Resources," page 109

Changing Job Data

Use one of the three update components on the Workforce Administration menu to update a person's job data. These components are configured to simplify updating a person's record in different business situations. The following table describes each component and its navigational path:

 Copyright © 1988-2006, Oracle. All rights reserved.

Component	Pages in the Component	Usage
Job Data Workforce Administration, Job Information, Job Data	Work Location (JOB_DATA1) Job Information (JOB_DATA_JOBCODE) Job Labor (JOB_LABOR) Payroll (JOB_DATA2) Salary Plan (JOB_DATA_SALPLAN) Compensation (JOB_DATA3) Employment Information (EMPLOYMENT_DTA1) Job Earnings Distribution (JOB_DATA_ERNDIST) Benefit Program Participation (JOB_DATA_BENPRG)	Work with historical effective-dated rows of the person's job data (work with past, present, and future job data).
Current Job Workforce Administration, Job Information, Current Job	Work Location (JOB_DATA1) Job Information (JOB_DATA_JOBCODE) Job Labor (JOB_LABOR) Payroll (JOB_DATA2) Salary Plan (JOB_DATA_SALPLAN) Compensation (JOB_DATA3) Employment Information (EMPLOYMENT_DTA1) Job Earnings Distribution (JOB_DATA_ERNDIST) Benefit Program Participation (JOB_DATA_BENPRG)	Update only the person's *current* job record. Doing so improves processing time and system performance. You can add new current effective-dated rows to the job record, but you cannot see or add historical job records.
Pay Rate Change Workforce Administration, Job Information, Pay Rate Change	Employee Profile (PAY_RT_CHANGE1) Salary Plan (PAY_RT_CHG_SALPLAN) Compensation (PAY_RT_CHANGE2) Job Earnings Distribution (PAY_RT_CHANGE3)	Change the person's compensation without changing job data.

Copyright © 1988-2006, Oracle. All rights reserved.

Updating Compensation Packages Without Using an Update Component

If you update job record data without using one of the update components, for example when initially loading data or when using your own written processes, the system does not update the calculated fields on the job record. To update the calculated fields, run the Employee Compensation process. If you update job record data by using one of the update components or a component interface built on one of the update components, you do not need to run the Employee Compensation process because the update components run all PeopleCode that is run online (including updating calculated fields). Using the update components is the best way to update the job table because the system runs all business logic.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Compensation*, "Refreshing Worker Compensation Information".

See Also

Chapter 6, "Increasing the Workforce," page 133

Locating Personnel Records

The first time that you open an update page, the system displays a search page for you to select the person on whose records you want to work. If you do not know the person's ID, use the page to search for the correct record by name, partial last name, alternate character name, department, setID, or employment status. If you prefer, use the Search By National ID page to find a person's record by using a national ID.

Changing and Deleting IDs

This section provides an overview of ID modification and discusses how to:

- Modify IDs.
- Delete IDs.
- View the ID change and delete process log.

Understanding ID Modification

IDs are the means by which you identify employees, contingent workers, and people of interest throughout PeopleSoft Enterprise Human Resources. Maintaining a precise roster of IDs is critical to the accuracy of your data.

To help you keep accurate records, you can change or delete IDs. Though you rarely need to do this, it is necessary in cases where you entered an ID in error or where you no longer need an ID.

The ID modification process changes the ID in every record where PeopleSoft Enterprise Human Resources uses it, so keep in mind that modifications might affect other functions, such as payroll and benefits processing. Deleting an ID also deletes all security profiles associated with the ID; therefore, it is recommended that you delegate this responsibility to your system administrator.

 Copyright © 1988-2006, Oracle. All rights reserved.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

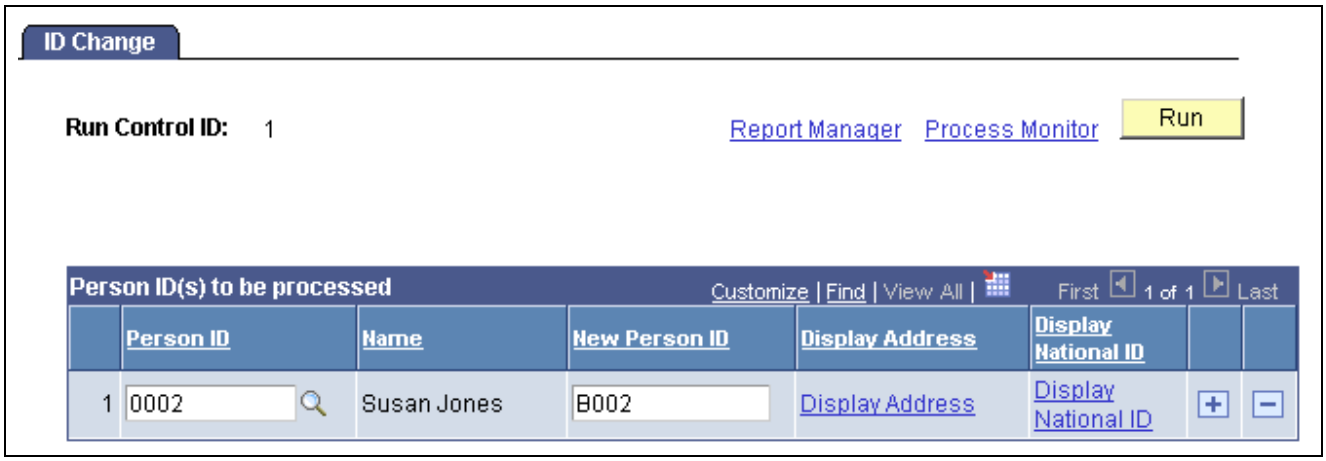
Pages Used to Change and Delete Employee IDs

Page Name	Object Name	Navigation	Usage
ID Change	RUNCTL_ID_CHANGE	• Set Up HRMS, System Administration, Database Processes, ID Change • Campus Community, Personal Information, ID Management, ID Change • Set Up SACR, System Administration, Database Processing, ID Change	Modify IDs.
ID Delete	RUNCTL_ID_CHANGÈ	• Set Up HRMS, System Administration, Database Processes, ID Delete • Campus Community, Personal Information, ID Management, ID Delete • Set Up SACR, System Administration, Database Processing, ID Delete	Remove IDs from the system. **Note.** If you've already run payroll with this ID included, you must manually delete payroll records, such as tax and deduction records.
ID Change/Delete Process Log	HR_PER502_LOG	• Set Up HRMS, System Administration, Database Processes, ID Change/Delete Process Log • Campus Community, Personal Information, ID Management, ID Change/Delete Process Log • Set Up SACR, System Administration, Database Processing, ID Change/Delete Process Log	Generate a log that lists which rows of data were affected when you changed or deleted an ID.

Modifying IDs

Access the ID Change page.

Copyright © 1988-2006, Oracle. All rights reserved.

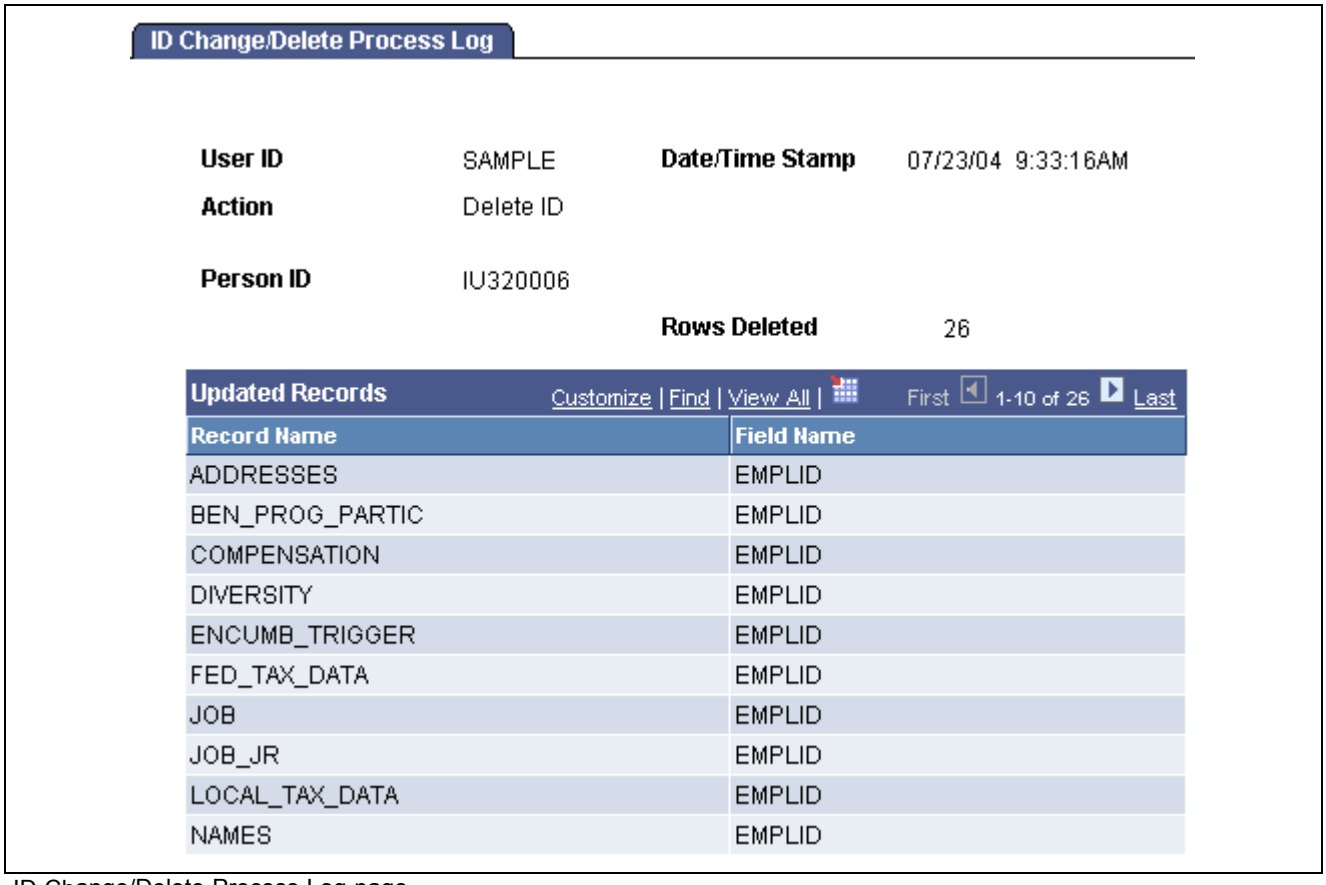


ID Change page

Select the current ID of the person that you want to process and enter the new ID. You can see display-only information on the person to whom the system or you assigned the original ID. Confirm that this is the correct person before you process the ID change.

Viewing the ID Change and Delete Process Log

Access the ID Change/Delete Process Log page.



ID Change/Delete Process Log page

This page lists the records and fields that the system modified when you changed or deleted the selected ID.

Copyright © 1988-2006, Oracle. All rights reserved.

Deleting Employment Record Numbers (ERNs)

This section provides an overview of deleting ERNs and discusses how to:

- Define Person ID/ Empl Rcd field names maintained in the system.
- Define exceptions for record processing.
- Define exception tables for ERN deletion.
- Process ERN deletions.
- List and review ERN Delete process results.

Understanding the Delete ERNs Component

Use the Delete ERNs component when ERNs are created in error or when ERNs exist for "no show" new hires (for example, workers who never reported for their first day of work and for whom there is no need to maintain an ERN). This component verifies that no combinations of PersonID/ERN exist that will cause problems for other processes, such as payroll or benefits, that are dependent on the ERN data.

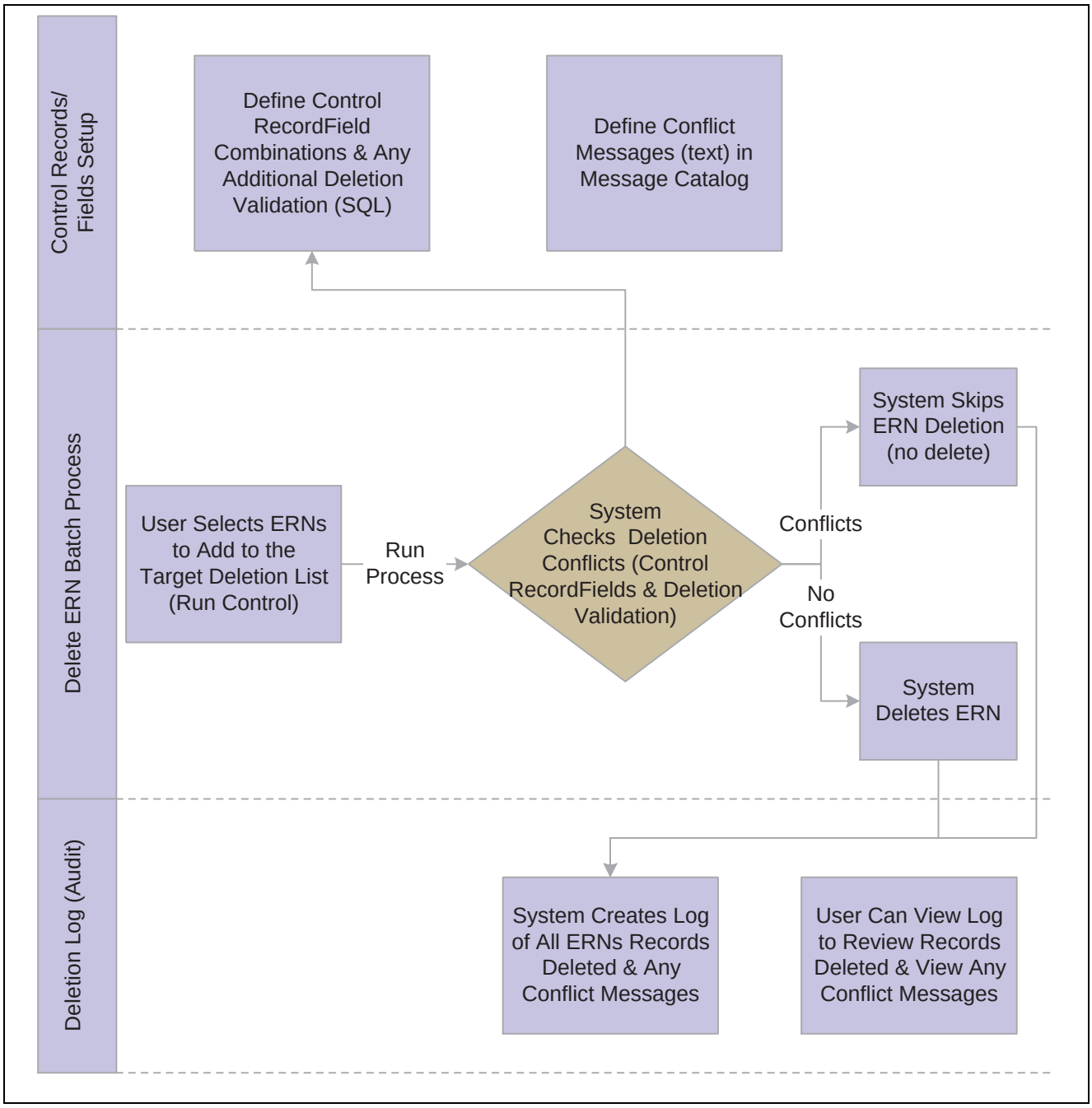
Before using this component, consider these points:

- This feature is designed to be used by HR System Administrators who have a good understanding of implications and processes related to deleting data across systems. Functional business users should not have access to this feature.
- This feature is not designed to delete ERN records for PersonID/Empl_Rcd combinations that have been used in key processes such as payroll, benefits, and time reporting. If the ERN has been used in key processes, the system will block deletion.
- PeopleSoft delivers system data conflict checks, but enables you to add additional logic and conflict checks to meet your organization's requirements for ERN deletion.

Note. Use this feature to avoid "false" same-day terminations that may cause errors in unemployment insurance eligibility and termination reports.

This flowchart illustrates the Delete ERN process:

Copyright © 1988-2006, Oracle. All rights reserved.



Delete ERN process flowchart

Deleting ERNs in a Multi-product Environment

The steps to delete ERNs affect HCM data only. No controls are delivered that check across products in a multi-product environment. Be aware of the impact of the delete process on other products and set up additional controls to avoid integrity issues.

For example, if an employee record number is created in HCM and then used in a product order, you can remove the ERN in HCM, but it still exists in the order database.

Copyright © 1988-2006, Oracle. All rights reserved.

Note. PeopleSoft provides a Message Subscription (service operation PERSON_ERN_DELETE) that is used to synchronize two HCM databases. It can be configured to synchronize other products.

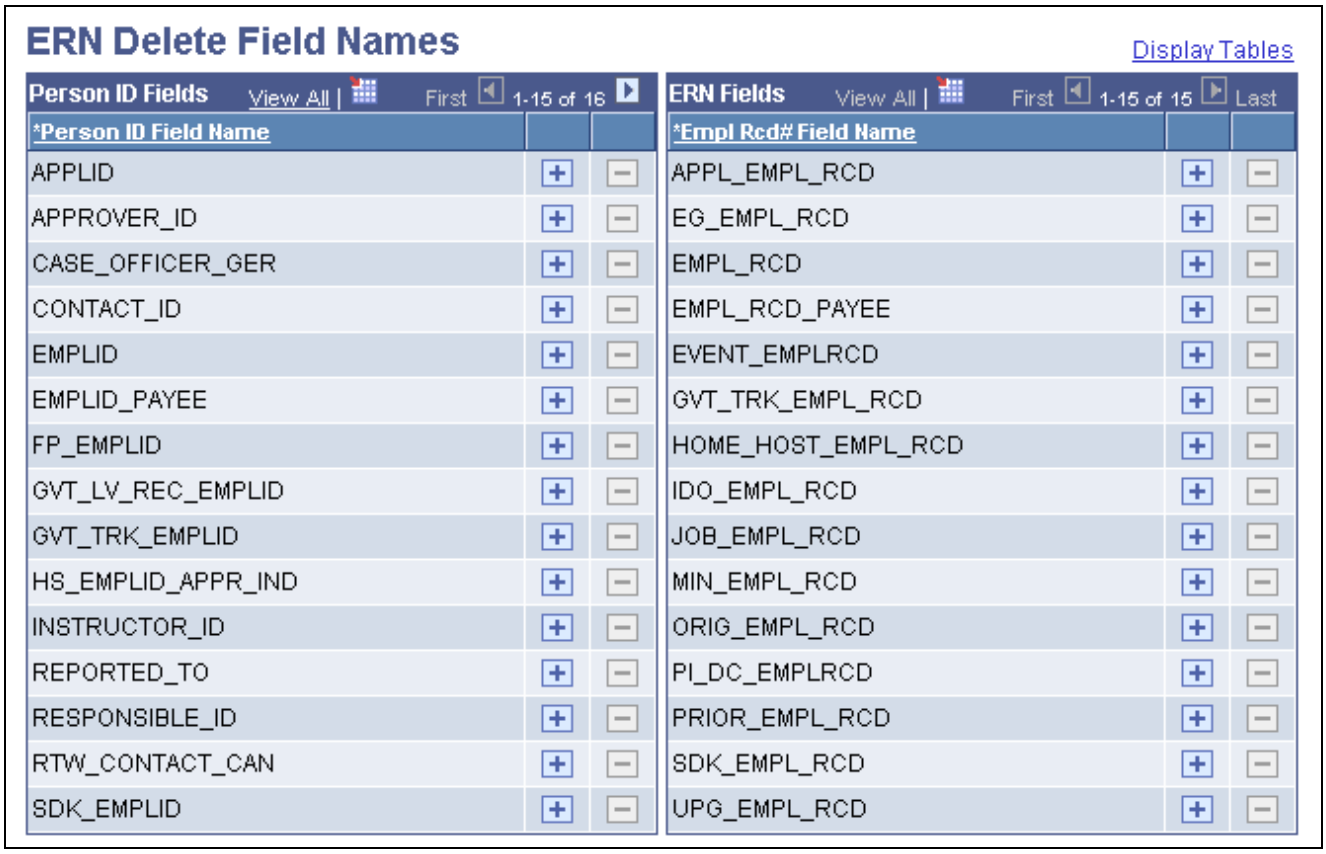
Pages Used to Delete ERNs

Page Name	Object Name	Navigation	Usage
ERN Delete Field Names	HR_EERCDDEL_FIELDS	Set Up HRMS, System Administration, Database Processes, ERN Delete Process, ERN Delete Field Names	Define Person ID field names and Empl Rcd# field names maintained in the system.
ERN Delete Control	HR_EERCDDEL_CTL	Set Up HRMS, System Administration, Database Processes, ERN Delete Process, ERN Delete Control	Define which Message Catalog message text to display for each Control Table/Field conflict. Define deletion restrictions to avoid deletion of ERNs with dependencies in the system.
ERN Delete Exception Tables	HR_EERCDDEL_EXC	Set Up HRMS, System Administration, Database Processes, ERN Delete Process, ERN Delete Exception Tables	Define exceptions for the deletion logic.
ERN Delete Process	HR_RUNCTL_EERCDDEL	Set Up HRMS, System Administration, Database Processes, ERN Delete Process, ERN Delete Process	Remove a Person ID or Empl_Rcd from the database.
ERN Delete Process Results	HR_EERCDDEL_RESULT	Set Up HRMS, System Administration, Database Processes, ERN Delete Process, ERN Delete Process Results	Lists ERN Delete Process results information.

Defining Person ID/Empl_Rcd Field Names Maintained in the System

Access the ERN Delete Field Names page.

Copyright © 1988-2006, Oracle. All rights reserved.



ERN Delete Field Names page

Person ID Fields Use this table to specify the field names for the Person ID available in the system.

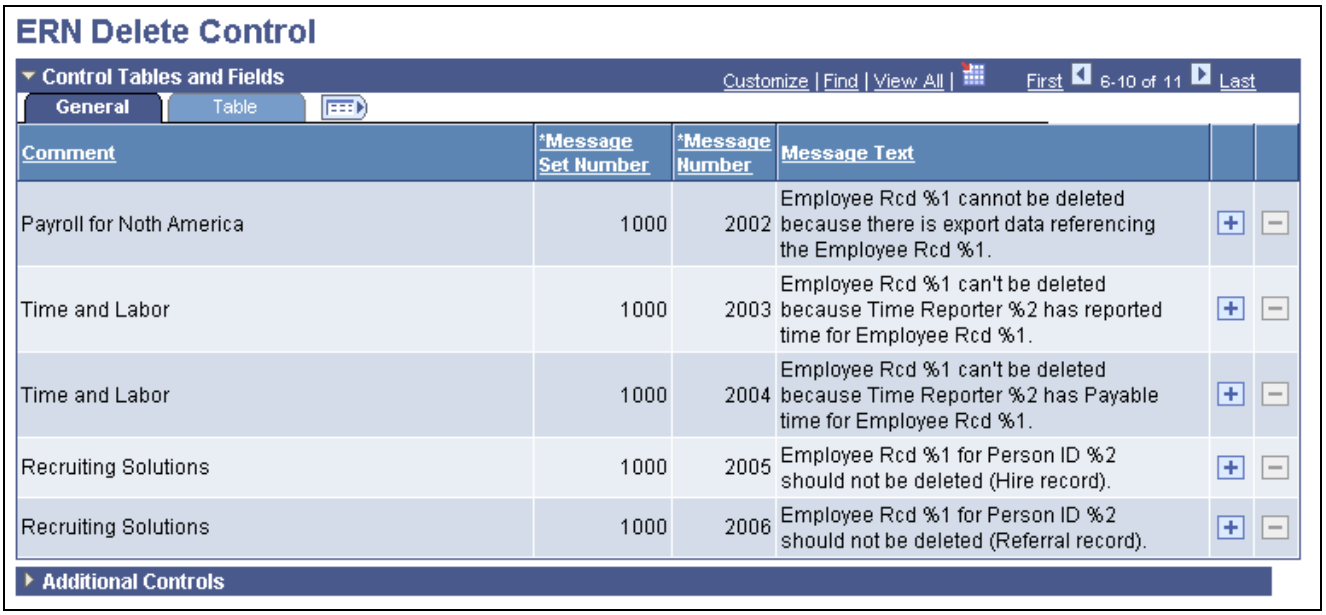
ERN Fields Use this table to specify the field names for the Empl Rcd available in the system.

Display Tables Click this link to display all tables in the system that have any combination of these defined PersonID and ERN fields. This display enables system administrators to review tables potentially impacted by the ERN Delete process.

Defining Exceptions for Record Processing

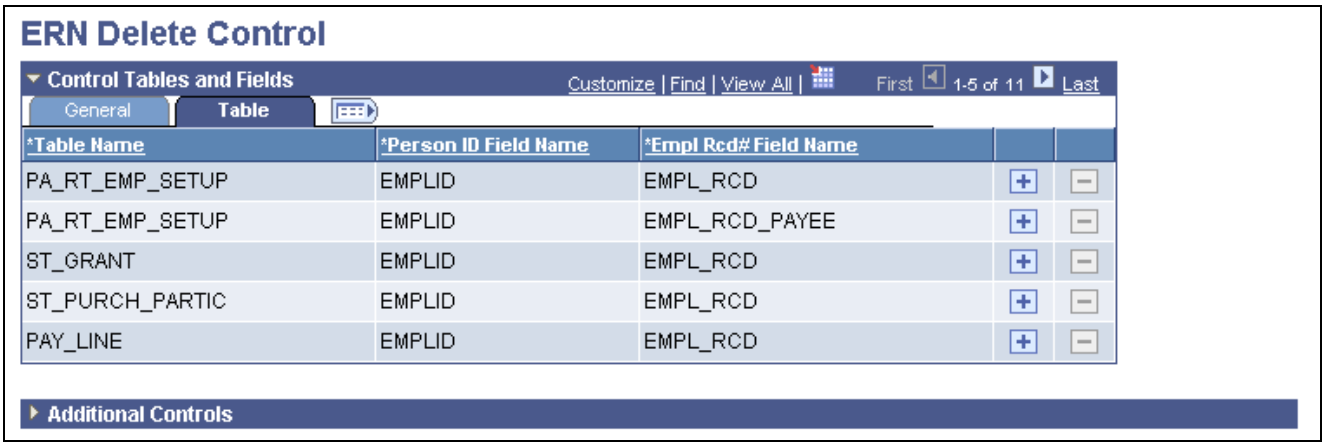
Access the ERN Delete Control page.

Copyright © 1988-2006, Oracle. All rights reserved.



ERN Delete Control page - General tab

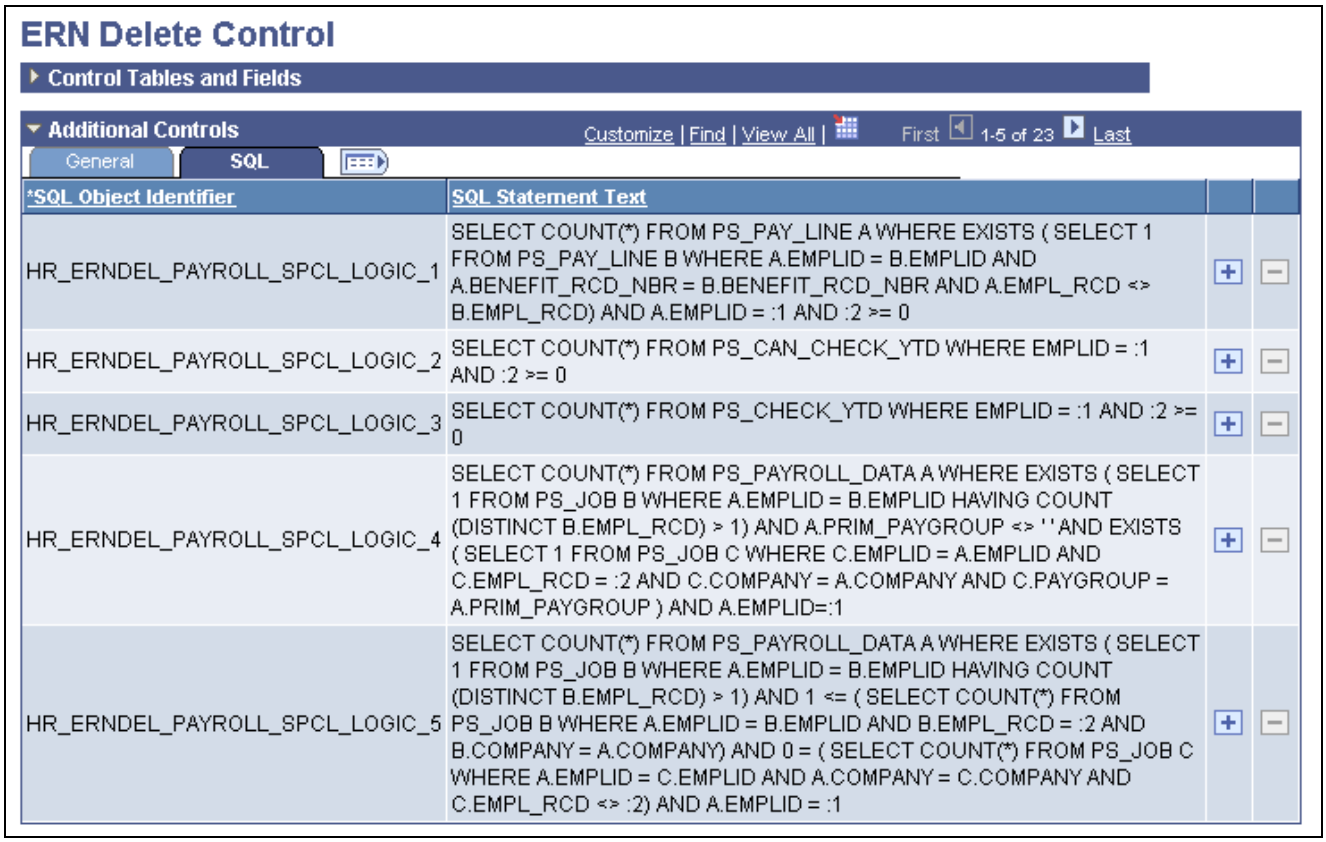
Each of the conflict checks has a configurable conflict message. You can assign conflict messages using the Message Catalog. Conflict messages are displayed on the ERN Delete Process Results page.



ERN Delete Control page: Table tab

The system checks these table and field combinations prior to running the Delete ERN process to help ensure that no key dependent data or process will be negatively impacted by the delete. The system scans the record/field combinations defined in this table and if an ERN that is targeted for deletion is identified in one of these control table/field combinations, the system prevents the ERN from being deleted.

Copyright © 1988-2006, Oracle. All rights reserved.



ERN Delete Control

Control Tables and Fields

Additional Controls Customize | Find | View All | First 1-5 of 23 Last

General SQL

*SQL Object Identifier	SQL Statement Text
HR_ERNDEL_PAYROLL_SPCL_LOGIC_1	SELECT COUNT(*) FROM PS_PAY_LINE A WHERE EXISTS (SELECT 1 FROM PS_PAY_LINE B WHERE A.EMPLID = B.EMPLID AND A.BENEFIT_RCD_NBR = B.BENEFIT_RCD_NBR AND A.EMPL_RCD <> B.EMPL_RCD) AND A.EMPLID = :1 AND :2 >= 0
HR_ERNDEL_PAYROLL_SPCL_LOGIC_2	SELECT COUNT(*) FROM PS_CAN_CHECK_YTD WHERE EMPLID = :1 AND :2 >= 0
HR_ERNDEL_PAYROLL_SPCL_LOGIC_3	SELECT COUNT(*) FROM PS_CHECK_YTD WHERE EMPLID = :1 AND :2 >= 0
HR_ERNDEL_PAYROLL_SPCL_LOGIC_4	SELECT COUNT(*) FROM PS_PAYROLL_DATA A WHERE EXISTS (SELECT 1 FROM PS_JOB B WHERE A.EMPLID = B.EMPLID HAVING COUNT (DISTINCT B.EMPL_RCD) > 1) AND A.PRIM_PAYGROUP <> ' ' AND EXISTS (SELECT 1 FROM PS_JOB C WHERE C.EMPLID = A.EMPLID AND C.EMPL_RCD = :2 AND C.COMPANY = A.COMPANY AND C.PAYGROUP = A.PRIM_PAYGROUP) AND A.EMPLID=:1
HR_ERNDEL_PAYROLL_SPCL_LOGIC_5	SELECT COUNT(*) FROM PS_PAYROLL_DATA A WHERE EXISTS (SELECT 1 FROM PS_JOB B WHERE A.EMPLID = B.EMPLID HAVING COUNT (DISTINCT B.EMPL_RCD) > 1) AND 1 <= (SELECT COUNT(*) FROM PS_JOB B WHERE A.EMPLID = B.EMPLID AND B.EMPL_RCD = :2 AND B.COMPANY = A.COMPANY) AND 0 = (SELECT COUNT(*) FROM PS_JOB C WHERE A.EMPLID = C.EMPLID AND A.COMPANY = C.COMPANY AND C.EMPL_RCD <> :2) AND A.EMPLID = :1

ERN Delete Control page: Additional Controls - SQL tab

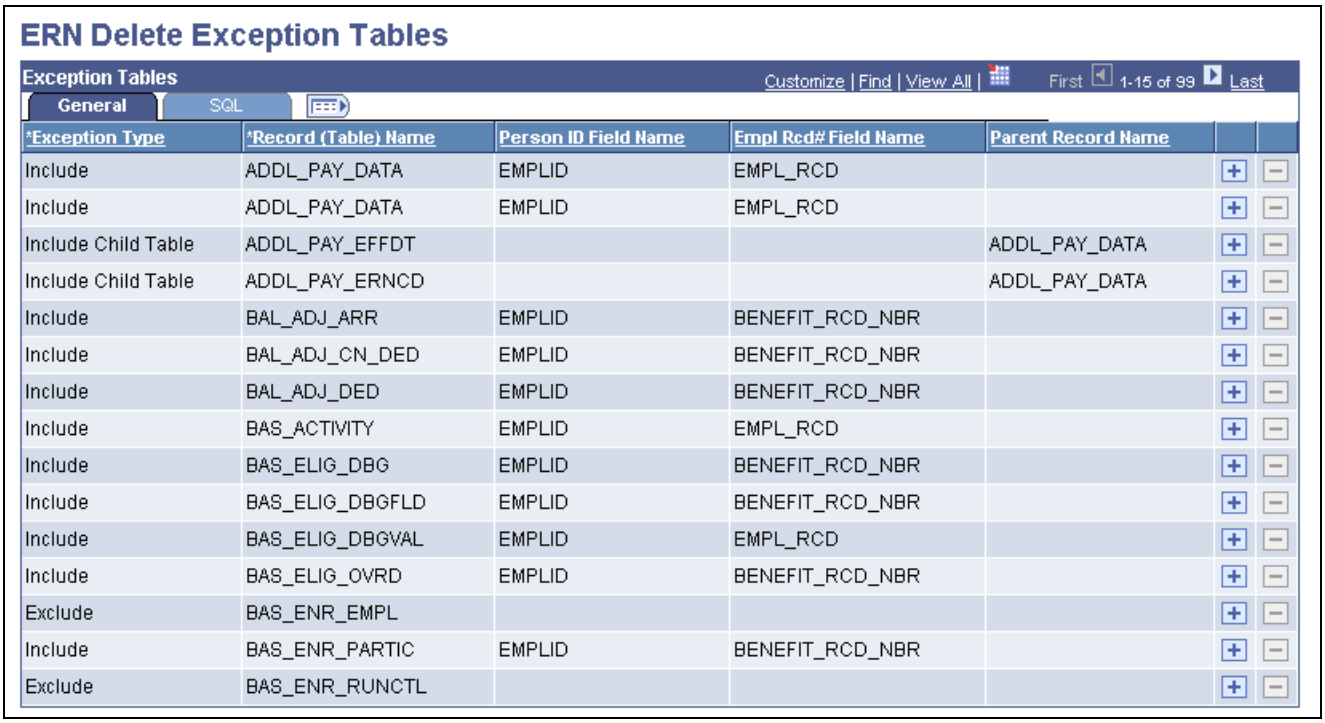
Use the SQL tab in the Additional Controls section of the page to enter more complex product specific conflict checking that cannot be represented through the simple entry of control records and fields. Add additional SQL logic that the system needs to check prior to deleting ERNs.

Note. You cannot delete ERN delete controls that are delivered as system data.

Defining Exception Tables for ERN Deletion

Access the ERN Delete Exception Tables page.

Copyright © 1988-2006, Oracle. All rights reserved.



ERN Delete Exception Tables

Exception Tables Customize | Find | View All | First 1-15 of 99 Last

General SQL

*Exception Type	*Record (Table) Name	Person ID Field Name	Empl Rcd# Field Name	Parent Record Name
Include	ADDL_PAY_DATA	EMPLID	EMPL_RCD	
Include	ADDL_PAY_DATA	EMPLID	EMPL_RCD	
Include Child Table	ADDL_PAY_EFFDT			ADDL_PAY_DATA
Include Child Table	ADDL_PAY_ERNCD			ADDL_PAY_DATA
Include	BAL_ADJ_ARR	EMPLID	BENEFIT_RCD_NBR	
Include	BAL_ADJ_CN_DED	EMPLID	BENEFIT_RCD_NBR	
Include	BAL_ADJ_DED	EMPLID	BENEFIT_RCD_NBR	
Include	BAS_ACTIVITY	EMPLID	EMPL_RCD	
Include	BAS_ELIG_DBG	EMPLID	BENEFIT_RCD_NBR	
Include	BAS_ELIG_DBGFLD	EMPLID	BENEFIT_RCD_NBR	
Include	BAS_ELIG_DBGVAL	EMPLID	EMPL_RCD	
Include	BAS_ELIG_OVRD	EMPLID	BENEFIT_RCD_NBR	
Exclude	BAS_ENR_EMPL			
Include	BAS_ENR_PARTIC	EMPLID	BENEFIT_RCD_NBR	
Exclude	BAS_ENR_RUNCTL			

ERN Delete Exception Tables page: General tab

Exception Type Select one of three options in this field:

- *Include* includes the table in the deletion process. Select this option when the table does not follow the standard rule, but specific requirements.
- *Exclude* excludes the table from the deletion process.
- *Include Child Table* includes a table that does not contains an ERN but is attached as a child to a table that must be deleted.

Record (Table) Name The name of the table to be included or exluded.

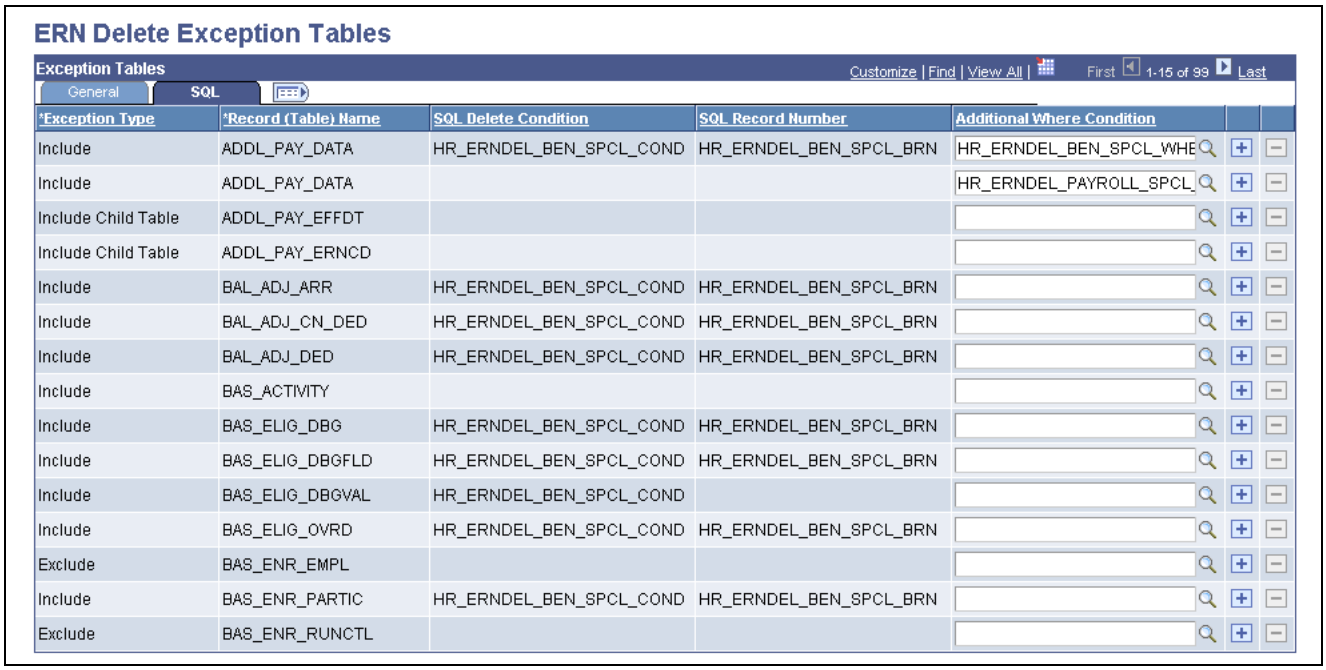
Person ID Field Name The name of the EmplD field to be used for deletion.

Empl Rcd#Field Name The name of the EMPL_RCD field to be used for deletion.

Parent Record Name Tthe parent table of child table to be included in the deletion.

Access the SQL tab on the ERN Delete Exception Tables page.

Copyright © 1988-2006, Oracle. All rights reserved.



ERN Delete Exception Tables

Exception Tables | Customize | Find | View All | First 1-15 of 99 Last

General | SQL

*Exception Type	*Record (Table) Name	SQL Delete Condition	SQL Record Number	Additional Where Condition
Include	ADDL_PAY_DATA	HR_ERNDEL_BEN_SPCL_COND	HR_ERNDEL_BEN_SPCL_BRN	HR_ERNDEL_BEN_SPCL_WHE
Include	ADDL_PAY_DATA			HR_ERNDEL_PAYROLL_SPCL
Include Child Table	ADDL_PAY_EFFDT			
Include Child Table	ADDL_PAY_ERNCD			
Include	BAL_ADJ_ARR	HR_ERNDEL_BEN_SPCL_COND	HR_ERNDEL_BEN_SPCL_BRN	
Include	BAL_ADJ_CN_DED	HR_ERNDEL_BEN_SPCL_COND	HR_ERNDEL_BEN_SPCL_BRN	
Include	BAL_ADJ_DED	HR_ERNDEL_BEN_SPCL_COND	HR_ERNDEL_BEN_SPCL_BRN	
Include	BAS_ACTIVITY			
Include	BAS_ELIG_DBG	HR_ERNDEL_BEN_SPCL_COND	HR_ERNDEL_BEN_SPCL_BRN	
Include	BAS_ELIG_DBGFLD	HR_ERNDEL_BEN_SPCL_COND	HR_ERNDEL_BEN_SPCL_BRN	
Include	BAS_ELIG_DBGVAL	HR_ERNDEL_BEN_SPCL_COND		
Include	BAS_ELIG_OVRD	HR_ERNDEL_BEN_SPCL_COND	HR_ERNDEL_BEN_SPCL_BRN	
Exclude	BAS_ENR_EMPL			
Include	BAS_ENR_PARTIC	HR_ERNDEL_BEN_SPCL_COND	HR_ERNDEL_BEN_SPCL_BRN	
Exclude	BAS_ENR_RUNCTL			

ERN Delete Exception Tables page: SQL tab

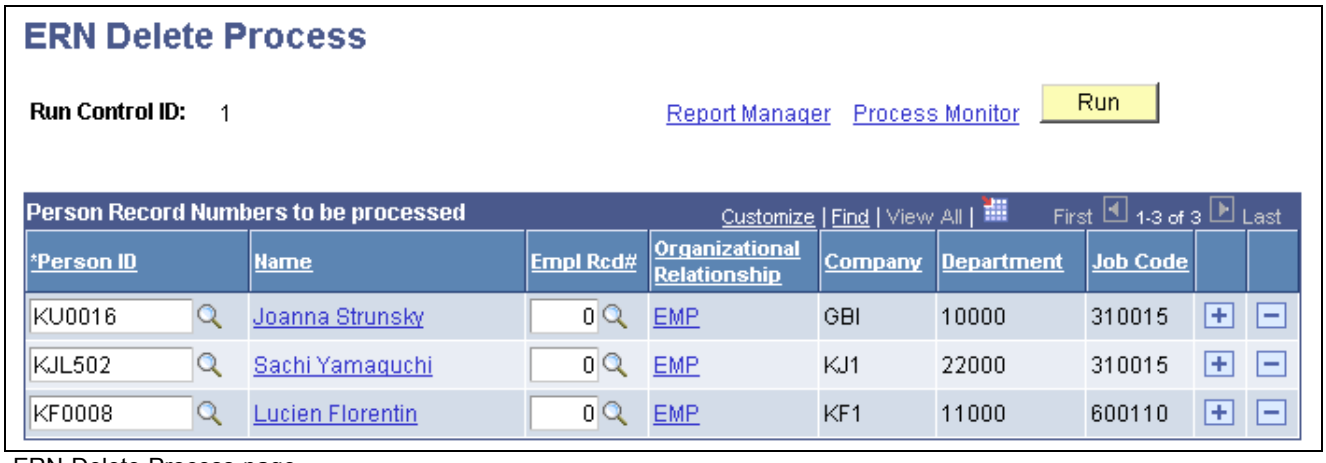
SQL Delete Condition Define a condition for deletion based on EMPLID and EMPL_RCD. If the request defined in the setup returns a number greater than 0, the record will be skipped during the deletion process.

SQL Record Number Define a request that returns the number to be used as the ERN based on EMPLID and EMPL_RCD.

Additional Where Clause Request that defines an additional where clause added during the deletion process.

Processing ERN Deletions

Access the ERN Delete Process page.



ERN Delete Process

Run Control ID: 1 Report Manager Process Monitor Run

Person Record Numbers to be processed | Customize | Find | View All | First 1-3 of 3 Last

*Person ID	Name	Empl Rcd#	Organizational Relationship	Company	Department	Job Code
KU0016	Joanna Strunsky	0	EMP	GBI	10000	310015
KJL502	Sachi Yamaguchi	0	EMP	KJ1	22000	310015
KF0008	Lucien Florentin	0	EMP	KF1	11000	600110

ERN Delete Process page

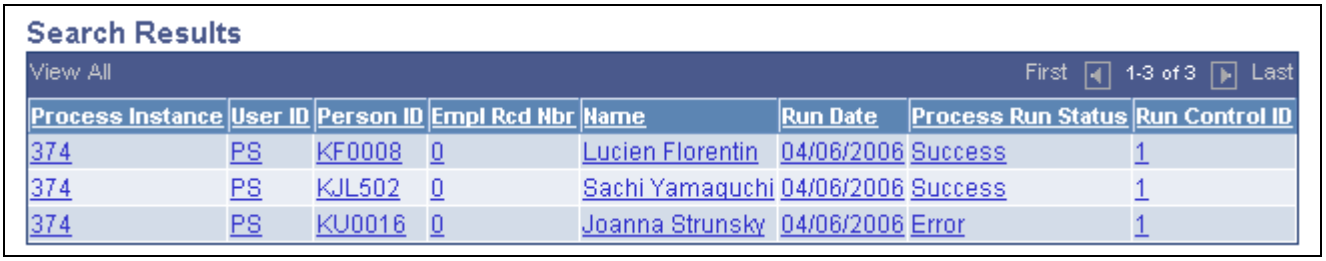
Person ID Use this lookup to select the person for whom you want to delete an ERN.

Copyright © 1988-2006, Oracle. All rights reserved.

Name	Displays the name of person selected. Click the hyperlink to display biographical data that enables you to confirm that this is the correct person.
Empl Rcd#	Use this lookup to select the employment record number to delete.
Organizational Relationship	Click the hyperlinks to view the Personal Organizational Summary page. This page enables you to confirm that you have selected the appropriate ERN.
Company	The company that is related to the ERN.
Department	The department that is related to the ERN.
Job Code	The job code that is related to the ERN.

Listing and Reviewing ERN Deletion Results

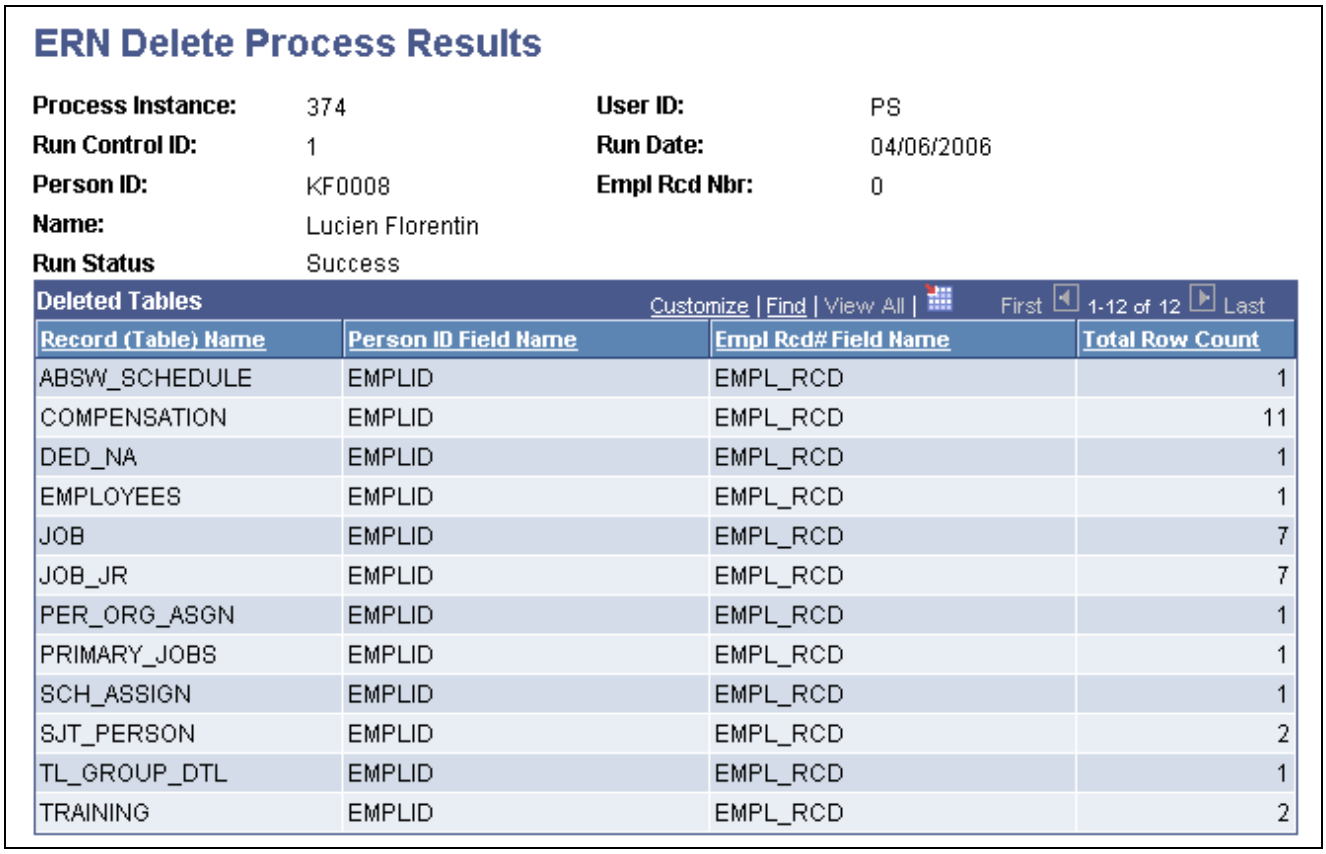
Access the ERN Delete Process Results page.



ERN Delete Process Results page

Click any link on a row to review the associated information related to the success or error of the ERN Delete process for that ERN.

Copyright © 1988-2006, Oracle. All rights reserved.



ERN Delete Process Results

Process Instance:	374	**User ID:**	PS
Run Control ID:	1	**Run Date:**	04/06/2006
Person ID:	KF0008	**Empl Rcd Nbr:**	0
Name:	Lucien Florentin		
Run Status	Success		

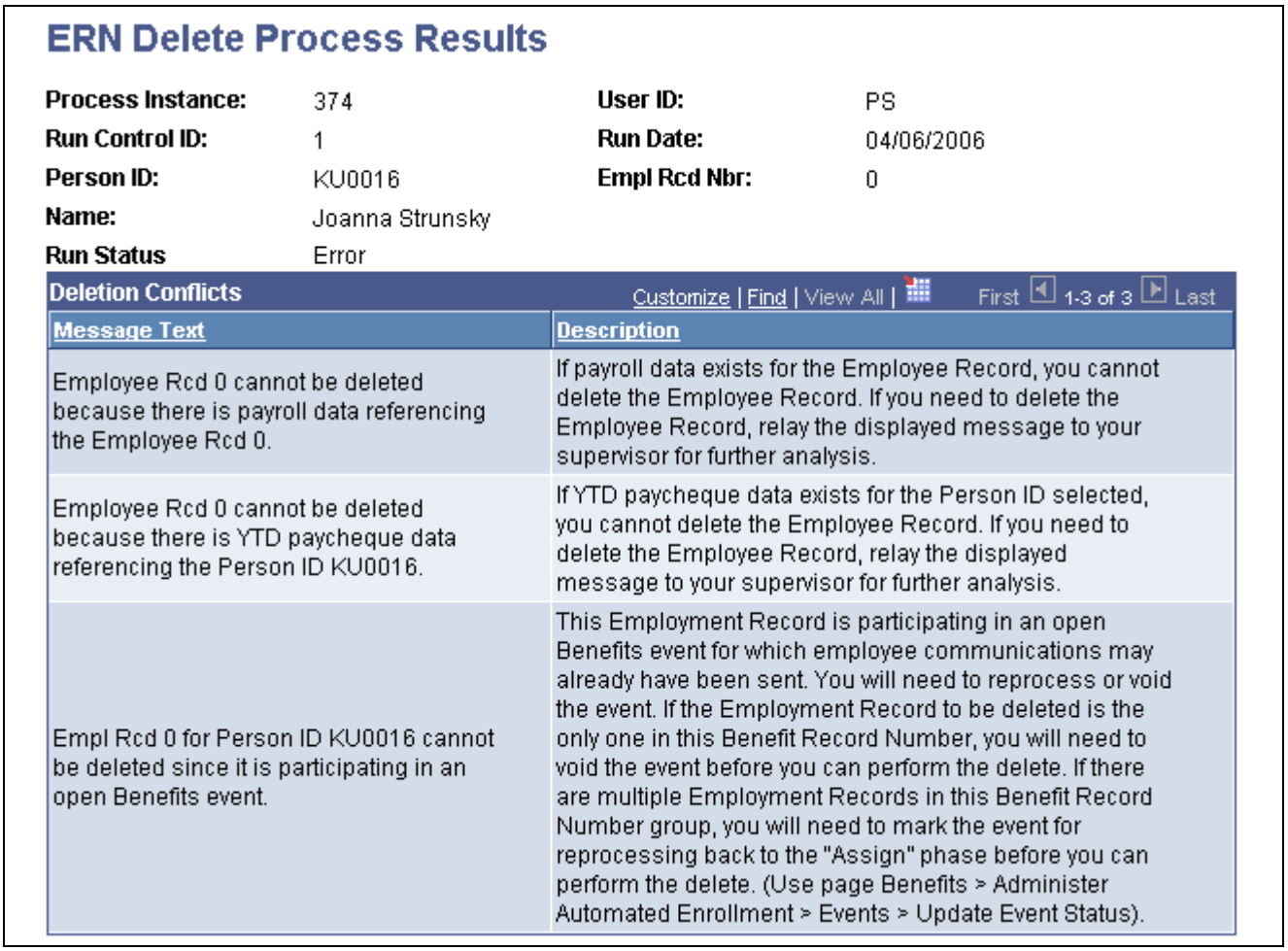
Deleted Tables Customize | Find | View All | First 1-12 of 12 Last

Record (Table) Name	Person ID Field Name	Empl Rcd# Field Name	Total Row Count
ABSW_SCHEDULE	EMPLID	EMPL_RCD	1
COMPENSATION	EMPLID	EMPL_RCD	11
DED_NA	EMPLID	EMPL_RCD	1
EMPLOYEES	EMPLID	EMPL_RCD	1
JOB	EMPLID	EMPL_RCD	7
JOB_JR	EMPLID	EMPL_RCD	7
PER_ORG_ASGN	EMPLID	EMPL_RCD	1
PRIMARY_JOBS	EMPLID	EMPL_RCD	1
SCH_ASSIGN	EMPLID	EMPL_RCD	1
SJT_PERSON	EMPLID	EMPL_RCD	2
TL_GROUP_DTL	EMPLID	EMPL_RCD	1
TRAINING	EMPLID	EMPL_RCD	2

ERN Delete Process Results page - example of success

Review the deleted information on the listed tables.

Copyright © 1988-2006, Oracle. All rights reserved.



ERN Delete Process Results

Process Instance:	374	**User ID:**	PS
Run Control ID:	1	**Run Date:**	04/06/2006
Person ID:	KU0016	**Empl Rcd Nbr:**	0
Name:	Joanna Strunsky		
Run Status	Error		

Deletion Conflicts Customize | Find | View All | First 1-3 of 3 Last

Message Text	Description
Employee Rcd 0 cannot be deleted because there is payroll data referencing the Employee Rcd 0.	If payroll data exists for the Employee Record, you cannot delete the Employee Record. If you need to delete the Employee Record, relay the displayed message to your supervisor for further analysis.
Employee Rcd 0 cannot be deleted because there is YTD paycheque data referencing the Person ID KU0016.	If YTD paycheque data exists for the Person ID selected, you cannot delete the Employee Record. If you need to delete the Employee Record, relay the displayed message to your supervisor for further analysis.
Empl Rcd 0 for Person ID KU0016 cannot be deleted since it is participating in an open Benefits event.	This Employment Record is participating in an open Benefits event for which employee communications may already have been sent. You will need to reprocess or void the event. If the Employment Record to be deleted is the only one in this Benefit Record Number, you will need to void the event before you can perform the delete. If there are multiple Employment Records in this Benefit Record Number group, you will need to mark the event for reprocessing back to the "Assign" phase before you can perform the delete. (Use page Benefits > Administer Automated Enrollment > Events > Update Event Status).

ERN Delete Process Results - Run Status - Error

The system displays the message text and a description of the reason the ERN deletion was not processed.

Updating Personal Data

Use the Modify a Person component to update a person's name, address, phone numbers, marital status, education, and other personal information.

This section provides an overview of types of personal data and discusses how to:

- Update effective-dated personal information.
- Use workflow to update person addresses.
- Update emergency contact information.
- Modify addresses.

See Also

Chapter 5, "Adding a Person in PeopleSoft Human Resources," page 109

Copyright © 1988-2006, Oracle. All rights reserved.

Understanding Types of Personal Data

The Personal Data pages include two different types of personal data:

- Effective-dated data.

  Name, address, biographical (such as education, marital status, and language), checklist, and some regional fields are effective-dated. Enter current, historical, or future information in these fields. When new information takes effect, the system stores the old data so that you can track the changes that occur over time.

  Effective-dated biographical data is stored in the Personal Data History record (PERS_DATA_EFFDT). Name information is stored in the NAMES record with its own effective date. Address information is stored in the ADDRESSES record with its own effective date.

- Noneffective-dated data.

  Some personal data fields aren't linked to an effective date. In these fields, new entries overwrite and delete the previous entries. This situation means that you can store only current information. The system stores noneffective-dated data in the Personal Data record (PERSON).

Note. PeopleSoft Enterprise Human Resources also includes a workflow process for updating employee addresses.

Pages Used to Update Personal Data

Page Name	Object Name	Navigation	Usage
Biographical Details	PERSONAL_DATA1	• Workforce Administration, Personal Information, Modify a Person, Biographical Details • Workforce Administration, Personal Information, Biographical, Modify a Person, Biographical Details • Stock, Modify a Person, Biographical Details • Enterprise Learning, Modify a Person, Biographical Details • Benefits, Administer COBRA Benefits, Maintain COBRA Non-Employees, Modify Personal Information • Pension, Payments, Create Payee, Create Payee • Click the Personal Data link on the Create Payee page, and then access the Payee Name page.	Update a person's personal information.

Copyright © 1988-2006, Oracle. All rights reserved.

Page Name	Object Name	Navigation	Usage
Contact Information	PERSONAL_DATA2	• Workforce Administration, Personal Information, Modify a Person, Contact Information • Workforce Administration, Personal Information, Biographical, Modify a Person, Contact Information • Stock, Modify a Person, Contact Information • Enterprise Learning, Modify a Person, Contact Information • Pension, Payments, Create Payee, Create Payee • Click the Personal Data link on the Create Payee page, and then access the Biographical Data page.	Update a person's name, address, phone, and email information.
Regional	PERSONAL_DATA3	• Workforce Administration, Personal Information, Modify a Person, Regional • Workforce Administration, Personal Information, Biographical, Modify a Person, Regional • Stock, Modify a Person, Regional • Enterprise Learning, Modify a Person, Regional	Maintain regionally-required information about a person.

Updating Effective-Dated Personal Information

To update effective-dated information on the Personal Data pages:

1. Insert a new data row in the effective-dated group boxes.

   Each of these group boxes can use different effective dates. They are not related.
2. Enter the date when the new personal data that you're entering will take effect.

   This date can be current or in the future.
3. Enter the new information.
4. Save the pages.

Copyright © 1988-2006, Oracle. All rights reserved.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Understanding HRMS," Effective Dates

Using Workflow to Update Person Addresses

Keeping a person's personal information current can be time-consuming. With workflow, users who do not ordinarily have access to the PeopleSoft Enterprise Human Resources system can update their address data by using an email program such as Lotus Notes to send the information to your PeopleSoft Enterprise Human Resources system.

Updating Emergency Contact Information

The system updates a worker's emergency contact information automatically if you specify that the contact information is the same as the worker's contact information. When the emergency contact information is different from the worker's contact information, you must maintain the emergency contact information manually on the Contact Address/Phone page.

To activate the automatic emergency contact address update:

1. Access the Contact Address/Phone page.
2. Select the Same Address as Employee and Same Phone as Employee check boxes *before* you update the worker's address.
3. Select the type of address and type of phone number that is the same as the emergency contact.

   When you update the worker's address, the system automatically updates the emergency contact address. It also updates the Dependent/Beneficiary pages in the Benefits menu and the Payroll Data pages in the Employee Payroll Data menu.

   If the emergency contact address changes and is no longer the same as the worker's, clear the Same Address as Employee and the Same Phone as Employee check boxes. The system makes the address fields on the Contact Address/Phone page available, and you can enter a different address. After you clear the check box, the system no longer updates the emergency contact address automatically.

   Even if the emergency contact address is the same as the worker's, you can enter a different phone number.
4. Use the Other Phone Numbers page to record emergency contact phone numbers for the emergency contact in addition to the primary number that is recorded on the Contact Address/Phone page.

See Also

Chapter 8, "Entering Additional Data in Human Resources Records," Tracking Emergency Contacts, page 331

Modifying Addresses

To enter a new address for a worker:

1. Select Workforce Administration, Personal Information, Biographical, Modify a Person, Contact Information.
2. Insert a new data row in the Current Addresses region.
3. Enter a new effective date for the new address information and click the Add Address link.
4. Enter the worker's new address information.

 Copyright © 1988-2006, Oracle. All rights reserved.

Updating Emergency Contact Address Information

The system also updates the Dependent/Beneficiary pages in the Benefits menu and the Payroll Data pages in the Maintain Payroll Data (USF) menu.

Running Personal Data Reports

This section lists the pages used to run personal data reports.

Pages Used to Run Personal Data Reports

Page Name	Object Name	Navigation	Usage
Employees Birthday	RUNCTL_PER002	Workforce Administration, Personal Information, Biographical, Birthdays Report	Run the Employee Birthdays report (PER002). This report lists employees and contingent workers, their birthdays, and other identifying information. **Note.** Run the Refresh Employees Table process before running this report.
Employee Home Address Listing	PRCSRUNCNTL	Workforce Administration, Personal Information, Biographical, Home Address Report	Run the Employee Home Address Listing report (PER020), which contains a complete listing of all employees and contingent workers, including addresses and home phone numbers.
Mailing Labels	PRCSRUNCNTL	Workforce Administration, Personal Information, Biographical, Mailing Labels Report	Run the Mailing Labels report (PER006), which produces a three-across set of mailing labels for all employees and contingent workers in your PeopleSoft Enterprise Human Resources database. **Note.** Run the Refresh Employees Table process before running this report.
(SGP) Parameters	RUNCTL_EMP_LIST	Workforce Administration, Job Information, Reports, Employee Listing SGP	Run the Employee Listing report (PER801SG). This report provides employee and contingent worker information based on the run control selections of department, employee name, or employee ID.

Copyright © 1988-2006, Oracle. All rights reserved.

Updating Job Data

Use the Job Data component when you want to work with a person's historical job data. If you need to work with a person's current job only, use the Current Job component for faster system performance. You can work only with current and future job data on the Current Job pages.

Note. The Job Data and Current Job components are made up of the same pages as the Add Employment Instance, Add Contingent Worker Instance, and Add Person of Interest components.

If you are using position management, you will want to update most job data on the Position Data pages.

(USF) Update job information using the U.S. Federal pages.

See Chapter 6, "Increasing the Workforce," page 133.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions*, "Managing Position Data".

See Chapter 18, "(USF) Processing Personnel Action Requests," page 621.

This section provides overviews of updating effective-dated job data, security for updating job data, and personnel actions and human resources and payroll status, and discusses how to:

- Update effective-dated job data.
- Enter promotions.
- Enter departmental transfers.
- Enter pay rate changes.
- Track leaves of absence.
- Enter terminations and retirements.
- Enter deaths.
- Enter rehires.
- Assign workers to different positions.
- Pay workers on disability.

Understanding Updating Effective-Dated Job Data

You usually update job data by inserting new effective-dated data rows into an existing employee record. Effective dates enable you to keep a complete chronological history of all your data and tables—whether you changed them two years ago or want them to go into effect two months into the future. With this information, you can review historical data from a particular time to analyze position data or employee records. Or you can plan ahead and set up tables and data before they take effect.

The system also uses effective dates to compare pages and tables to ensure that the prompt tables that you see list only data that is valid as of the effective date of the current page. For example, if you create a new department code with an effective date of May 1, 2004 and enter a new data row (or update an existing row) on the Job Data pages that has an effective date *before* May 1, 2004, you won't see the new code as a valid choice when you select a department because the new code hasn't taken effect yet.

 Copyright © 1988-2006, Oracle. All rights reserved.

When you enter a new data row, the system copies the contents of the previous row into the new row—thus you do not have to retype any information that stays the same. (Ensure that you position the cursor on the data row that you want to copy before you insert the new row.) The only new information is the effective date, which is set by default to the system date (usually today's date).

Understanding Security for Updating Job Data

When you update a job record, keep in mind two special security issues.

Security and Effective-Dated Sequence Numbers

When you transfer people from one department to another by using a data row that contains an effective-dated sequence number, the system currently allows users with security access to the old or new department to have access to all the job data. The system is delivered this way because implementing security in system views that are specific to the function Max (effseq) on PS_JOB would slow down online response time.

For example, when you transfer an employee from department 1 to department 2 and give the employee a promotion on the same day, users with access to either department 1 or 2 have access to the employee's data because the transfer data row contains an effective-dated sequence number.

You can prevent this access by changing the security views for the PeopleSoft applications that you use. Keep in mind, however, that making the change affects system performance.

Security for Transfers Between Departments

PeopleSoft Enterprise Human Resources enables users to assign people to departments that they cannot access for updates. If you want to prevent a user from transferring a person into a department for which the person does not have access, use the PeopleSoft Enterprise Human Resources DEPT_TBL_ACCESS view, which shows only those department IDs that a user can access based on the security permission lists to which they belong.

Note. If you choose to use this view, you must create a permission list for users who have access to all departments so that they can perform transfers.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Working with System Data Regulation in HRMS"

Understanding Personnel Actions and Human Resources and Payroll Status

When you select an action to change a person's job data, the system may change the person's HR or payroll, or job status. For example, when you select *Retired,* the system changes the HR status from *Active* to *Inactive.*

HR status indicates whether the person is still active in the human resources system. The Payroll Status field (for employees) indicates the payroll status or job status of the person. A person can have an active HR record but not be currently receiving pay (employee) or holding a job (contingent worker). Conversely, a person could have an inactive job record but continue to receive pay. For example, if you select retirement with pay, the system changes the HR status to *Inactive* and changes the payroll status from *Active* to *Retired with Pay.* The two status fields enable you to accurately identify the different types of people in your organization.

Copyright © 1988-2006, Oracle. All rights reserved.

The statuses are based on either the personnel action or, in a few cases, the *reason* for the action, such as death. A change in HR status or payroll status can affect PeopleSoft Enterprise Human Resources Manage Base Benefits, PeopleSoft Enterprise Benefits Administration, PeopleSoft Enterprise Payroll processing, and PeopleSoft Enterprise Pension Administration. For example, a promotion or a job reclassification might affect an employee's benefit coverage, or you might need to suspend benefit coverage during a leave of absence or a suspension.

This table explains how the system sets status:

Personnel Action	HR Status	Payroll Status	Payroll Processing for PeopleSoft Enterprise Payroll for North America and the Payroll Interface
Hire Add contingent worker Add person of interest Rehire (employees only) Return from leave Return from disability Additional job Recall from suspension or layoff Assignment	*Active*	*Active*	Yes
Leave of absence Short-term disability Long-term disability	*Active*	*Leave of Absence*	No
Paid leave of absence Short-term disability with pay Long-term disability with pay	*Active*	*Leave with Pay*	Yes
Retirement with pay (employees only)	*Inactive*	*Retired with Pay*	Yes
Terminated with benefits Terminated with pay	*Inactive*	*Terminated with Pay*	Yes

Copyright © 1988-2006, Oracle. All rights reserved.

Personnel Action	HR Status	Payroll Status	Payroll Processing for PeopleSoft Enterprise Payroll for North America and the Payroll Interface
Layoff Suspension Temporary assignment	*Active*	*Suspended*	No
Retirement	*Active*	*Retired*	No
Assignment completion Completion (contingent workers only) Termination	*Inactive*	*Terminated*	No
Pay rate change Demotion Data change Earnings distribution change Job reclassification Position change Probation Completion of probation Promotion Transfer	The same status that's in the previous data row. If no previous data row exists, the system sets the status to *Active.*	The same status that's in the previous data row. If no previous data row exists, the system sets the status to *Active.*	Varies

Note. If your organization uses PeopleSoft Enterprise Payroll for North America, the system does not generate payroll paysheets for workers whose status is *Retired* or *Terminated.* If you need to pay workers for a partial pay period or for a time after they leave the company, select the personnel action *Retired with Pay* or *Terminated with Pay.*

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Maintaining Payroll Data"

Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Update Job Data and Salary Data

Page Name	Object Name	Navigation	Usage
Work Location	JOB_DATA1	• Workforce Administration, Job Information, Job Data, Work Location • Workforce Administration, Job Information, Current Job, Work Location	Update position and location information for a person's job.
Job Information	JOB_DATA_JOBCODE	• Workforce Administration, Job Information, Job Data, Job Information • Workforce Administration, Job Information, Current Job, Job Information	Update information about a person's job.
Job Labor	JOB_LABOR	• Workforce Administration, Job Information, Job Data, Job Labor • Workforce Administration, Job Information, Current Job, Job Labor	Update national labor agreement data.
Payroll	JOB_DATA2	• Workforce Administration, Job Information, Job Data, Payroll • Workforce Administration, Job Information, Current Job, Payroll	Update payroll processing data.
Salary Plan	JOB_DATA_SALPLAN	• Workforce Administration, Job Information, Job Data, Salary Plan • Workforce Administration, Job Information, Current Job, Salary Plan	Update a person's salary plan information.

Copyright © 1988-2006, Oracle. All rights reserved.

Page Name	Object Name	Navigation	Usage
Compensation	JOB_DATA3	• Workforce Administration, Job Information, Job Data, Compensation • Workforce Administration, Job Information, Current Job, Compensation	Update a person's compensation information.
Employment Information	EMPLOYMENT_DTA1	Click the Employment Data link at the bottom of any page in the Job Data or Current Job Data component. • Workforce Administration, Job Information, Job Data • Workforce Administration, Job Information, Current Job	Update optional employment information.
Job Earnings Distribution	JOB_DATA_ERNDIST	Click the Earnings Distribution link at the bottom of any page in the Job Data or Current Job Data components. • Workforce Administration, Job Information, Job Data • Workforce Administration, Job Information, Current Job	Update a person's compensation information.
Benefit Program Participation	JOB_DATA_BENPRG	Click the Benefit Program Participation link at the bottom of any page in the Job Data or Current Job Data components. • Workforce Administration, Job Information, Job Data • Workforce Administration, Job Information, Current Job	Update a person's benefit enrollment information.

Updating Effective-Dated Job Data

Access the Work Location page.

To update effective-dated job data:

1. Locate the person whose record you want to change.

Copyright © 1988-2006, Oracle. All rights reserved.

Always start on the Work Location page because that's where the Effective Date field is. From there, you may have to go to other pages to enter more information about the personnel action that you're taking.

2. Insert a new data row.
3. In the Effective Date field, enter the date when the new action will take effect.
4. Select an action code for the change, such as *Transfer* or *Promotion.*
5. If applicable, enter a reason code to explain why this action is occurring.
6. Change any other data needed to complete the new action, either on this page or on other pages in the component.

   For example, when you promote an employee, you most likely enter a new job code or a new position number on the Work Location page. You might also select a new salary administration plan, grade, and step, enter a new compensation rate on the Compensation page, and enter a new business title and work phone on the Employment Information page.
7. Save the pages.

Entering Multiple Actions with the Same Effective Date

On occasion, you may need to enter more than one action that takes effect on the same day. Entering two actions with the same effective date is especially common when you are tracking compound percentage pay increases that take effect at the same time. Use effective sequence numbers to combine multiple actions and specify which one to process first.

For example, a promotion (which produces a percentage pay increase) and a merit increase may take effect on the same day.

To enter multiple personnel actions with the same effective date:

1. Access the Work Location page for the person whose data you're updating.
2. Insert a new data row for the first action.

   The effective date is set by default to the system date, usually today's date, which you can override if necessary. Leave the effective sequence number set at *0.*
3. Enter any other information that you need to complete the action, either here or in other pages in the same component.
4. To enter the second action, return to the Work Location page and insert another data row.
5. Enter the same effective date as the first action, but enter an effective date sequence number of *1*.
6. Select the appropriate personnel action and enter any other information required to implement the action, either here or on other pages.

Entering Promotions

A promotion usually involves a change of salary grade and new job code. This table lists the pages and fields that you typically update when you enter a promotion (you may need to update additional pages and fields):

 Copyright © 1988-2006, Oracle. All rights reserved.

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action Code: *Promotion* Reason Code (if applicable) Position Number	All the entries on the page could change when you enter a promotion, depending on the data for the former job and the new job. If you're organizing part or all of PeopleSoft Enterprise Human Resources by position, review *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions*.
Job Information	Job Code Regular/Temporary Full/Part Standard Hours Work Period FTE Shift Shift Rate Contract Number Local country fields	All the entries on the page could change when you enter a promotion, depending on the data for the former job and the new job. If you're organizing part or all of PeopleSoft Enterprise Human Resources by position, review *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions*.
Salary Plan Compensation	Salary Administration Plan/Grade/Step Compensation Rate	Update Salary Plan/Grade/Step on the Salary Plan page. Also update compensation information on the Compensation page.
Employment Information	Business Title Work Phone	Update these fields as needed.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Compensation, "Refreshing Worker Compensation Information," Changing a Compensation Package

Entering Departmental Transfers

Enter a transfer action when you want to assign a person to a new department without changing the person's job code. A transfer also implies that the worker's salary grade and compensation remain the same.

If you're organizing part or all of PeopleSoft Enterprise Human Resources by position, use the transfer action to move a worker from one position to another. To move the position *and* the incumbent to a new location or department, use the Position Data pages.

Copyright © 1988-2006, Oracle. All rights reserved.

This table lists the pages and fields that you typically update when you enter a transfer (you may need to update additional pages and fields):

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action Code: *Transfer* Reason Code (if applicable) Department	The system automatically enters a new location if it finds matching location setIDs in the Department table and the Tableset Record Group Control for the business unit that you're using.
Employment Information	Business Title Work Phone	Update these fields as needed.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions, "Managing Position Data"

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Working with System Data Regulation in HRMS"

Entering Pay Rate Changes

This table lists the pages and fields that you typically change when you enter a pay rate change. You may need to update additional pages and fields, as well.

Note. If you do not need to modify any job-related information, you can use the Pay Rate Change component.

See Chapter 15, "Updating Person and Job Information," Updating Salary Information, page 575.

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action Code: *Pay Rt Chg* (pay rate change) Reason Code (if applicable)	Enter *Pay Rate Change* to enter a salary change that isn't related to a change in salary grade or job code. If the pay rate change results from a salary grade or job code change, enter the change as a promotion or some other action.

Copyright © 1988-2006, Oracle. All rights reserved.

Affected Pages	Affected Fields	Comments
Salary Plan	Salary Administration Plan/Grade/Step	Enter a new salary step if the pay rate change involves a change in step. You cannot select a new grade because if the pay rate resulted from a change in salary grade, you enter the rate change as part of a promotion or other action. If you selected the Multi-Step/Grade check box on the Installation Table page and you enter a new step on this page, click the Default Pay Components button on the Compensation page if you want the system to supply default values for that step. Doing so is necessary unless you have distributed the worker's earnings by amount on the Job Earnings Distribution page. For job earnings distributions, manually update the distribution for the new rate.

Copyright © 1988-2006, Oracle. All rights reserved.

Affected Pages	Affected Fields	Comments
Compensation	All fields	To enter a new pay rate, enter a new compensation rate, rate change amount, or rate change percent. When you enter any one of these three amounts, the system automatically calculates the other two. Based on the compensation rate and frequency, the system calculates and displays the hourly rate, daily rate, monthly rate, and annual rate for this worker. If you selected the Multi-currency check box on the Installation Table page and entered the compensation rate in a different currency from your base currency, the system converts the rates to the base currency and compares them with the ranges specified for this salary grade in the Salary Grade table. If the rates exceed the salary range, a warning message appears. If necessary, enter a new annual benefits base rate for calculating this employee's benefits. The system calculates the compa-Ratio (or percent through range calculation) based on the salary plan and grade and in the base currency that your organization uses, which you specify on the Installation Table page. The system also calculates the percent through range. This figure determines where a worker falls in the range by taking the salary minus the minimum divided by the spread. For example, if an employee has a salary of 26,000 USD in a range of 25-30,000 USD for the salary grade, the percent through range is 20 percent.

Copyright © 1988-2006, Oracle. All rights reserved.

Affected Pages	Affected Fields	Comments
Compensation (continued)		Modify any other information that has changed because of the pay rate change, such as holiday schedule, pay group, employee type, standard hours, or work period on the Job Data, Payroll, or Job Information pages.
Job Earnings Distribution		Update as needed to distribute the worker's compensation hours or earnings.

Tracking Leaves of Absence

Many workers take a leave of absence at some point in their careers. Leaves can occur for any number of reasons, including sickness, vacation, maternity or paternity leave, jury duty, suspensions, or unpaid leave.

If your company tracks workers' absence history, you can acknowledge a leave of absence in the Monitoring Absences pages and Job Data pages.

This table lists the pages and fields that you typically change when you enter a leave of absence (you may need to update additional pages and fields, as well):

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action: *Leave of Absence, Leave of Absence with Pay,* or *Paid Leave of Absence* Reason Code (if applicable)	None
Employment Information	Expected Return Date	Enter the date when you expect the worker to start work again. When you save the pages, the system displays the day before the leave of absence date as the date last worked. You can change it if necessary. When the worker returns from leave, the system clears this field.

Tracking Multiple Types of Leave for One Worker

You might encounter situations in which you need to enter multiple types of leave for the same worker. For example, an employee might take a six-week leave with disability pay, take the following two weeks with vacation pay, and then take an additional month without pay.

Copyright © 1988-2006, Oracle. All rights reserved.

You can enter all these leave types at the same time by inserting a new data row in the Work Location page for each type of leave and entering the effective date when each leave type begins. Then you access the appropriate page to make any other changes pertaining to that leave, such as compensation changes.

Entering Returns from Leave

Most workers eventually come back from leaves of absence and resume their job duties. In fact, you often know at the time workers begin their leaves when they plan to return to work. Enter the return from leave information at the same time that you enter the leave of absence, or as soon as you have a confirmed return date.

This table lists the pages and fields that you typically change when you enter a return from leave (you may need to update additional pages and fields, as well):

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action: *Return from Leave* Reason Code (if applicable)	None
Employment Information	Expected Return Date	When you save the pages, the system clears this field.

Entering Terminations and Retirements

When a worker retires or leaves your organization for some other reason, you enter the termination into the person's record.

This table lists the pages and fields that you typically change when you enter a termination or retirement (you may need to update additional pages and fields, as well):

Copyright © 1988-2006, Oracle. All rights reserved.

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action: *Terminated, Terminated with Pay, Terminated with Benefits, Retirement,* or *Retirement with Pay* Reason Code, if applicable	The system treats the effective date that you enter as the day the termination starts and the first day the worker is no longer paid. For example, if the worker's last day of employment is June 1, set the effective date of termination or retirement as June 2 because that's when the termination begins. If you set it as June 1, the worker isn't paid for the last day of work.
Employment Information	Termination Date	The system displays the day *before* the effective date as the termination date and last date worked. If you rehire the worker, the system clears both these fields. When a worker returns from leave, the system clears only the Date Last Worked field.

Entering Deaths

This table lists the pages and fields that you typically change when you enter a termination due to death:

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action: *Terminated* Reason Code: *Death*	The system treats the effective date that you enter as the day the termination starts and the first day that the worker is no longer paid.
Identity/Diversity	Date of Death	Record the date that the worker died.
Employment Information		The system displays the termination effective date as the termination date, and the day before the termination date as the date last worked. The system uses these dates and the effective date in payroll processing and reporting.

Copyright © 1988-2006, Oracle. All rights reserved.

Entering Rehires

You may want to rehire a person who worked for your company in the past. Information on a rehired worker is probably already in PeopleSoft Enterprise Human Resources, unless the worker data was deleted or archived. Before you rehire workers, you may want to make sure that the personal, employment, and job data is current. If a rehired worker doesn't have a record in the system, do not use the update pages. Instead, add a new employment or contingent worker instance.

See Chapter 6, "Increasing the Workforce," page 133.

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

Because you probably rehire a worker whose previous job was in a department (organizational entity) for which you do not have security access, it's helpful to provide security access to all departments to at least one user performing rehires.

This table lists the pages and fields that you typically change when you enter a rehire (you may need to update additional pages and fields):

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action: *Rehire* Reason Code, if applicable	You can rehire only workers whose payroll or job status is *Terminated, Terminated with Pay, Retired,* or *Retired with Pay.*
Employment Information	Company Seniority Date Service Date Rehire Date Service Months Service Days	You may want to change the company seniority date and service date. The company seniority date can serve as the basis for the worker's seniority, or you can use it for other tracking and reporting purposes. The service date is the date on which the worker's service ranking is based and is used primarily for benefit-related matters. When you save the pages, the system automatically completes the rehire date and recalculates the service months and days.

See Also

Chapter 6, "Increasing the Workforce," page 133

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Assigning Workers to Different Positions

If you're organizing part or all of PeopleSoft Enterprise Human Resources by position, you often move workers from one position to another as a result of promotions, transfers, rehires, or other personnel actions. Because both position and worker data are already in the system, you connect the two by selecting a position number, entering the effective date of the assignment, and entering any exceptions to the default data.

 Copyright © 1988-2006, Oracle. All rights reserved.

The following table lists the pages and fields that you typically change in the Job Data component when you enter a change of position. You may need to update additional pages and fields. When you change an assignment, the system also updates the Position Data - Work Location page. It automatically calculates and displays the new head count and shows the appropriate indicator in the Open/Filled field.

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action: *Position Change, Transfer, Promotion,* or *Rehire* Reason Code, if applicable Position Number	After you enter a position number, the system automatically completes position-related fields, including job code, department, and location. The system enters the position entry date as the effective date of the position change action. You cannot change the position entry date. To change the entry date, you must change the effective date for the position change action. To override the position defaults, select the Position Data Override check box, which makes the previously unavailable fields available for entry, such as Job Code and Department. You can then enter exceptions in these fields. The Position Management Record check box is display-only. The system uses this check box to indicate that it has automatically inserted a data row on the Job Data pages due to changes that you made to fields on the Position Data pages. **Note.** If you override the defaults, you must maintain the job data manually—the system does not update position data automatically again until you clear the Position Data Override check box. The system issues a warning message if you assign a worker to a position that has already been filled by another worker and if a new appointment exceeds the maximum head count for that position.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions, "Managing Position Data"

Copyright © 1988-2006, Oracle. All rights reserved.

Paying Workers on Disability

Some workers on disability need to be paid at a given percentage of their regular pay. Handle this situation without changing the worker's salary by setting up a disability plan earnings code in the Earnings table, based on a percentage.

Note. This feature works only for hourly employees, not for salaried employees.

When you enter an action of *STD* (short-term disability with pay) or *LTD* (long-term disability with pay), the system changes the employee's status to *Leave With Pay.*

To send 100 percent of the employee's pay to the disability plan earnings code, access the Job Data - Job Earnings Distribution page, select the By Percent option, enter the appropriate disability earnings code, and enter a percent of *100.*

Note. When you put an employee on disability, don't forget to check additional pay records and make any necessary changes.

Updating Military Ranks

This section provides an overview of military rank updates in Job Data and rank tracking in Manage Profiles.

Understanding Military Rank Updates in Job Data

Military rank changes are tracked in a person's Job Data record. This table lists the pages and fields that you typically update when you enter a military rank change (you may need to update additional pages and fields):

Affected Pages	Affected Fields	Comments
Work Location	Effective Date Action Code: *Data Change* Reason Code (if applicable) Position Number Service Component Component Category	All the entries on the page could change depending on what the rank change involves and the service member's job. An action code may vary too depending upon other job changes related to the rank change, such as promotion or department transfer. If you're organizing part or all of PeopleSoft Enterprise Human Resources by position, military rank information does not default from the position.
Job Information	Job Family Job Function Job Subfunction	Update any other fields as needed.

Copyright © 1988-2006, Oracle. All rights reserved.

Affected Pages	Affected Fields	Comments
Salary Plan	Rank Rank Entry Data Skill Grade Worn Rank Worn Rank Type Salary Administration Plan Grade	Rank is tied to Salary Plan and Grade. This may also involve updating compensation information on the Compensation page.
Employment Information	Engagement Date Early Promotion Date	Update other fields as needed.

Understanding Rank Tracking in Manage Profiles

PeopleSoft Human Resources Manage Profiles manages the attributes of jobs or individuals. Typically, profiles summarize the competencies, qualifications, and skills of a job or a person as well as a service member's military ranks. The profile search and compare features enable you to perform searches for profiles that match user-defined criteria and easily compare profiles.

In order to keep military rank profiles up to date with Job Data, use the Refresh Names and Profiles MIL process (MIL_NAME_BLD). The system uses the HCM Event Manager to raise an event when a change to an assignment's military rank has occurred and execute this change.

The following prerequisites must be in place prior to running the Refresh Names and Profiles MIL process:

- The Integration Broker must be active.
- In HCM Event Manager, the event *AssignmentMilitaryRankChanged* must be active.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Working with HCM Event Manager," Understanding the HCM Event Manager.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles.*

Page Used to Synchronize Ranks in Job Data with Manage Profiles

Page Name	Object Name	Navigation	Usage
Refresh Names and Profiles MIL	MIL_REBUILD_NAMES	Workforce Administration, Collective Processes, Refresh Names and Profiles MIL	Run this process to rebuild the names and profiles of all the military personnel and synchronize this data with the Manage Profile records.

Copyright © 1988-2006, Oracle. All rights reserved.

Updating Organizational Instance and Assignment Relationships

This section provides an overview of organizational instance and assignment relationships and discusses how to:

- Promote an assignment to an instance.
- Move an assignment to another instance.
- Demote an instance.

Understanding Organizational Instance and Assignment Relationships

When you promote an assignment to an instance, you make an additional assignment into its own instance. For example, you might want to terminate a controlling instance, but maintain the additional assignment. If not, additional jobs are terminated automatically when you terminate the controlling instance. To promote an instance for a single employee online, add a new row on the Work Location page of the Job Data component. Use the Promote Assignment page to promote assignments for multiple employees as a batch process.

Use the Demote Instance page to make a controlling instance into an additional assignment under another instance. To demote an instance, the controlling instance should not have any additional assignments.

Use the Move Assignment page to move an additional assignment to another instance. This is useful to correct errors. For example, when you select the wrong employee record number to be the controlling instance.

These restrictions apply to modifying organizational instance and assignment relationships:

- These actions are valid only for employees and contingent workers; persons of interest are not eligible.
- These actions are not valid for Japan additional appointments and temporary assignments.
- You can only promote a host assignment to an instance if the host assignment is terminated and there are no future assignment rows with action ASG (Assignment) or ASC (Assignment Completion).
- Assignments with future rows with action ADL (Additional Job) are ineligible.
- You cannot change or delete a row after you confirm any of these actions.

The action codes that are entered on the rows for these actions are:

- OCA – Promote an Assignment to an Instance.
- OCI – Demote an Instance.
- OCM – Move an Assignment to another Instance.

Prerequisites

You must define action reasons that correspond to the delivered actions OCA, OCI, and OCM before using this component.

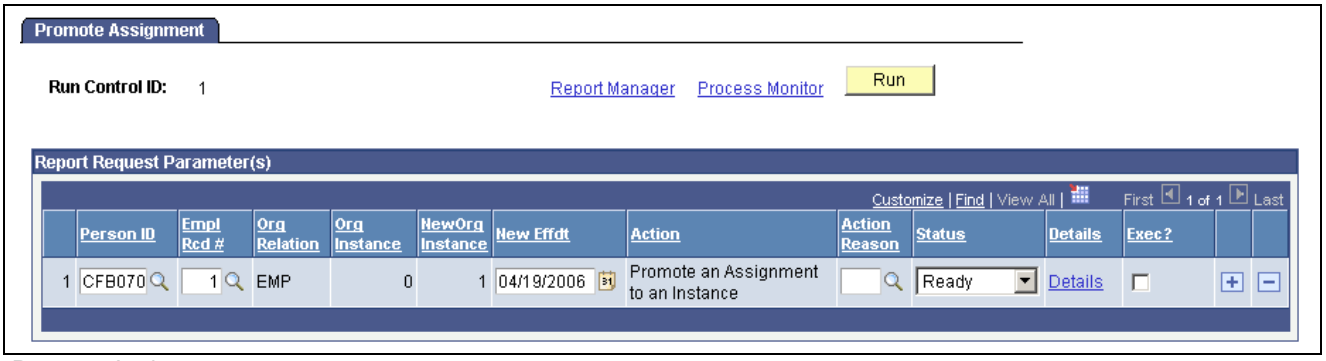
 Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Modify Organizational Instance and Assignment Relationships

Page Name	Object Name	Navigation	Usage
Work Location	JOB_DATA1	Workforce Administration, Job Information, Job Data, Work Location	Enter a new row on this page to modify instance and assignment relationships.
Promote Assignment	RUNCTL_OC_PRO_ASG	Workforce Administration, Collective Processes, Promote an Assignment, Promote Assignment	Batch process to promote assignments for multiple employees.
Promote Assignment - Details	HCR_OC_PRO_ASG_SEC	Workforce Administration, Collective Processes, Promote an Assignment, Promote Assignment Click the Details link on the Promote Assignment page.	Review the errors and warnings returned by the component interface.
Move Assignment	HCR_OC_CHG_ASGN	Workforce Administration, Job Information, Move Assignmnt to another Inst, Move Assignment	Move an additional assignment to another instance.
Demote an Instance	HCR_OC_CHG_ASGN	Workforce Administration, Job Information, Demote an Instance, Demote an Instance	Use this page to change a controlling instance to an additional assignment under another instance. You can demote an instance to an assignment only if the instance does not have any additional assignments.

Promoting an Assignment

Access the Promote Assignment page.



Promote Assignment page

Org Relation The organizaitonal relationship. Valid values are *EMP* for employee and *CWR* for contingent worker.

Org Instance The actual org instance.

Copyright © 1988-2006, Oracle. All rights reserved.

New Effdt The new effective date defaults to today's date.

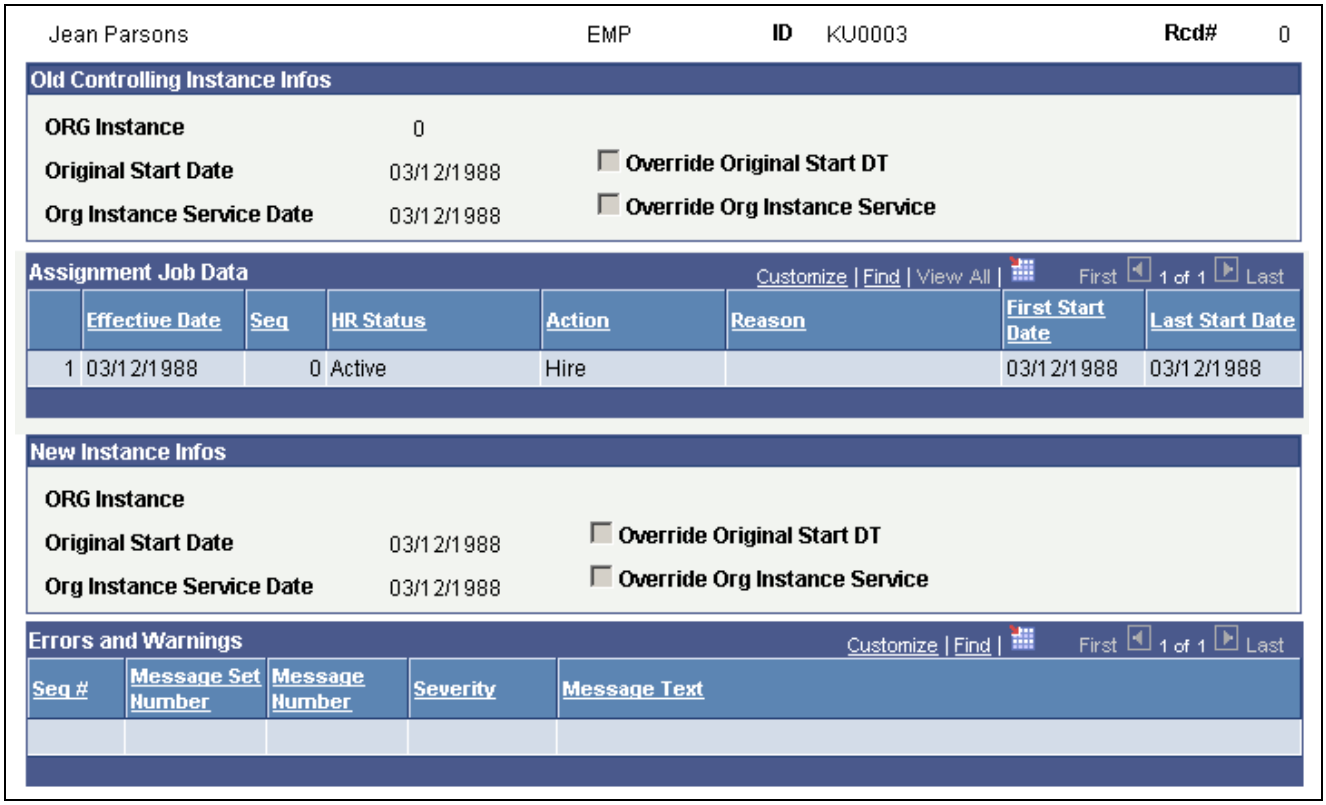
Status Available values are *Ready*, *Failure*, *Success*, and *Cancelled*. The default value is *Ready* for all rows.

After the process has run to completion, you can review the status. If, for any reason, the transaction has not been loaded to the records, the status of the row is set to *Failure*. Otherwise the status is *Success*. You must determine the reasons why transactions ended in *Failure* and change the status back to *Ready* or to *Cancelled* before you run the process again.

Exec? The process loads only the rows with Status set to *Ready* and with the Exec? check box selected.

Details Click the link to open the Details page. Use this page to review the errors and warnings returned by the component interface.

Click the Details link to access the Details page for Promote Instance.



Promote Assignment - Details page

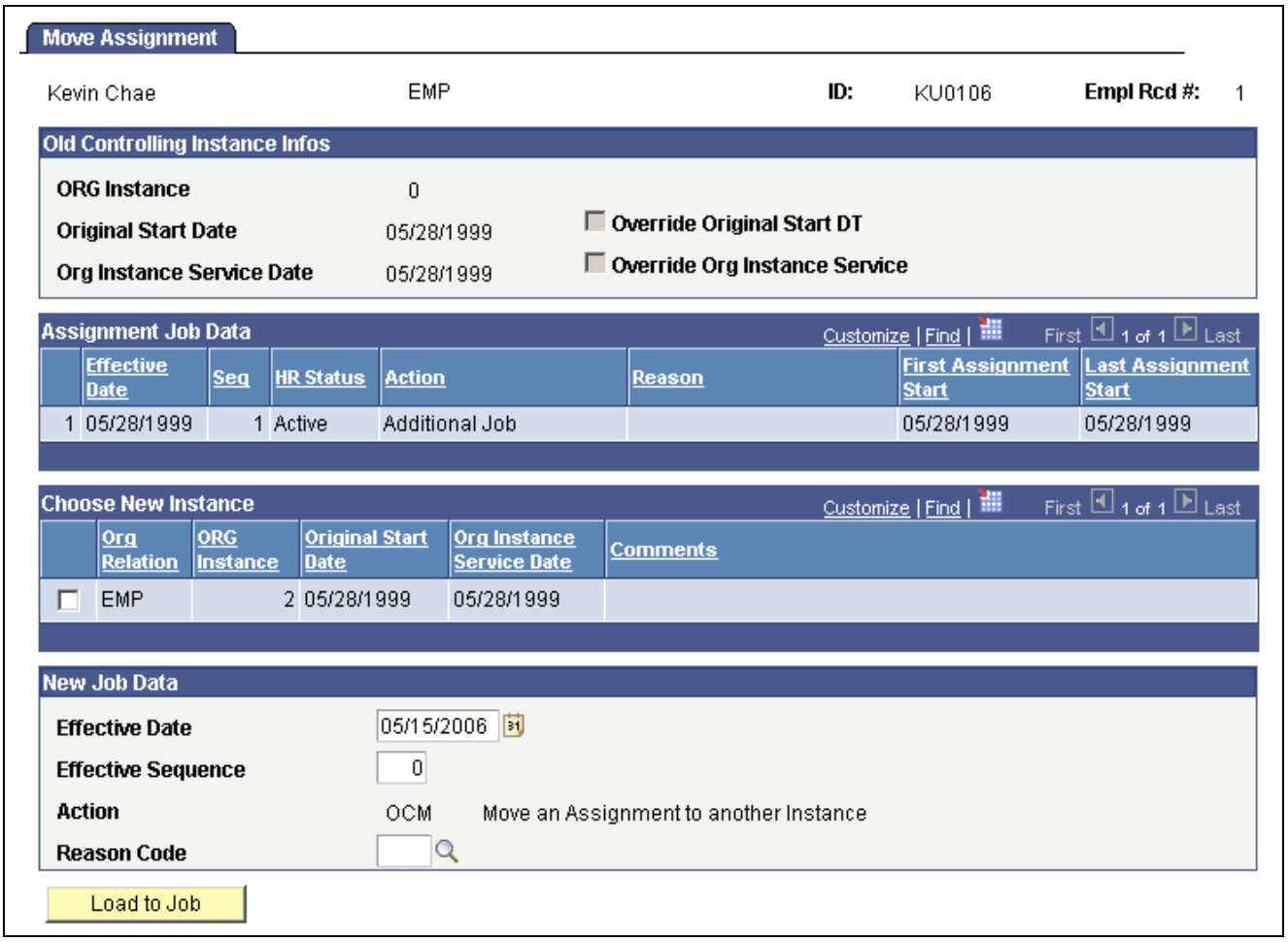
Old Controlling Instance Infos This information is for display only.

Assignment Job Data The grid displays job data for the selected assignment, sorted by effective date in ascending order.

Moving an Assignment to Another Instance

Access the Move Assignment page.

Copyright © 1988-2006, Oracle. All rights reserved.



Move Assignment page

Choose New Instance This grid lists all instances for this employee per organization. If you select an assignment that has a start date prior to the instance's first hire date, you cannot select that instance. You can only move an assignment to an instance if the active date of the assignment coincides with the dates of the instance.

New Job Data Enter the job effective date, job effective sequence, the action reason for the action. The action code defaults to OCM (move an assignment to another instance), and cannot be changed.

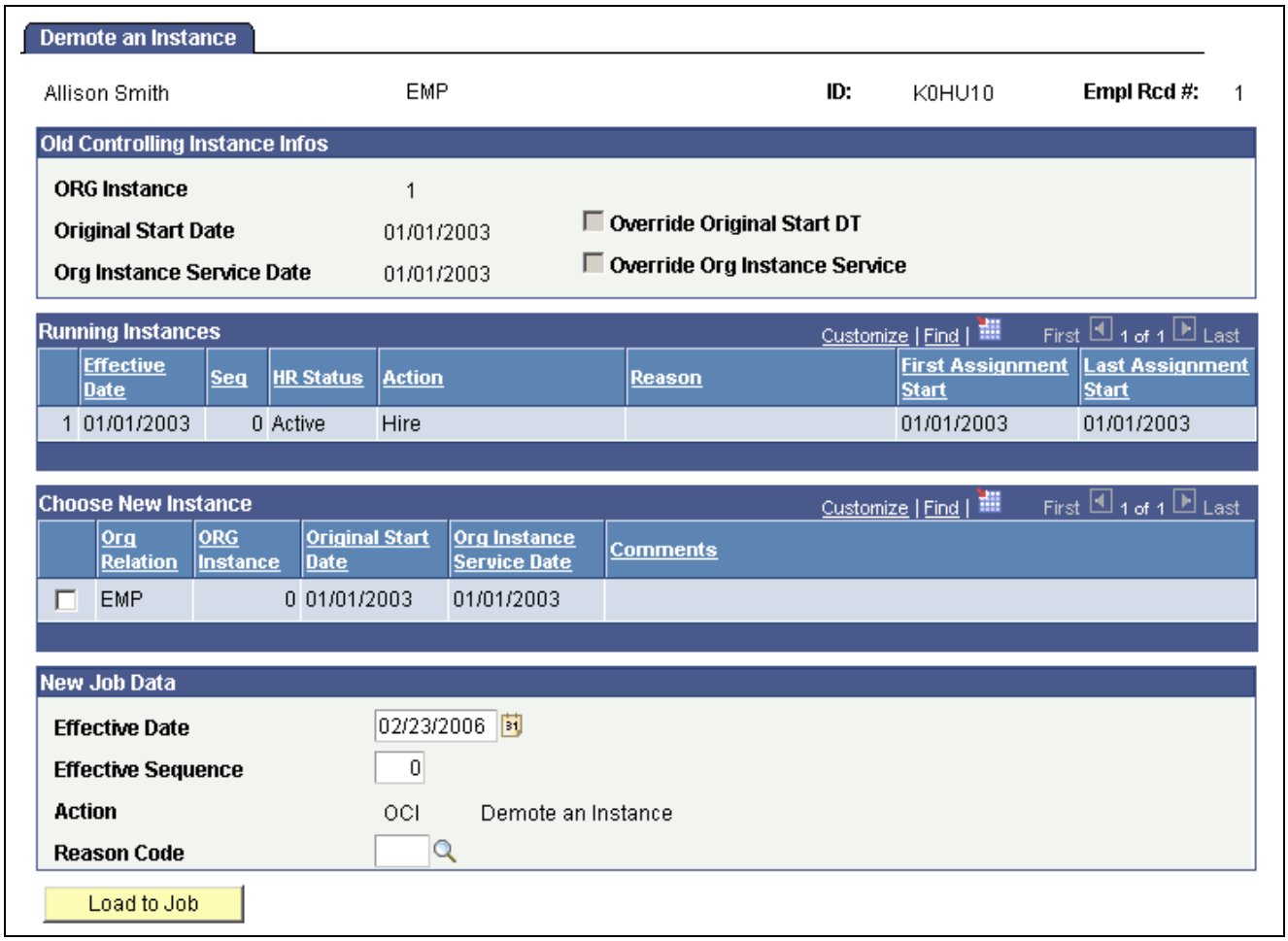
Load to Job Click this button to insert the new job data into the JOB record.

Transfer to Job This button is displayed after the Load to Job process runs successfully. Click the Transfer to Job button to review the updated JOB data. If the process does not run successfully, an Errors and Warnings grid appears that lists the errors.

Demoting an Instance

Access the Demote an Instance page.

Copyright © 1988-2006, Oracle. All rights reserved.



Demote an Instance page

Old Controlling Instance Infos This information is for display only.

Running Instances The grid displays job data for the selected assignment, sorted by effective date in ascending order.

Choose New Instance This grid lists all instances for this employee per organization. If you select an assignment that has a start date prior to the instance's first hire date, you cannot select that instance. You can only move an assignment to an instance if the active date of the assignment coincides with the dates of the instance.

New Job Data Enter the job effective date, job effective sequence, the action reason for the action. The action code defaults to OCI (Demote and Instance), and cannot be changed.

Load to Job Click this button to insert the new job data into the JOB record.

Transfer to Job This button is displayed after the Load to Job process runs successfully. Click this button to review the updated JOB data. If the process does not run successfully, an Errors and Warnings grid appears that lists the errors.

Copyright © 1988-2006, Oracle. All rights reserved.

Updating Salary Information

The Pay Rate Change component provides a quick and simple option for making salary adjustments when the adjustment is not related to any other changes such as promotions or transfers. If any other job-related information needs to be modified for the salary change, use the Job Data component.

Note. The four pages in the Pay Rate Change component—Employee Profile, Salary Plan, Compensation, and Job Earnings Distribution—match related pages in the Job Data component (the Employee Profile page contains information from both the Work Location page and the Job Information page).

See Also

Chapter 15, "Updating Person and Job Information," Updating Job Data, page 552

Chapter 6, "Increasing the Workforce," page 133

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Compensation and Budgeting, "Administering Salary Plans, Grades, and Steps"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Compensation and Budgeting, "Reviewing Worker Performance History"

Pages Used to Update Salary Information

Page Name	Object Name	Navigation	Usage
Employee Profile	PAY_RT_CHANGE1	Workforce Administration, Job Information, Pay Rate Change, Employee Profile	Adjust the work periods and hours if it is necessary to do so for the pay rate change.
Salary Plan	PAY_RT_CHG_SALPLAN	Workforce Administration, Job Information, Pay Rate Change, Salary Plan	Adjust the salary step.
Compensation	PAY_RT_CHANGE2	Workforce Administration, Job Information, Pay Rate Change, Compensation	Adjust rates and frequencies.
Job Earnings Distribution	PAY_RT_CHANGE3	Workforce Administration, Job Information, Pay Rate Change, Job Earnings Distribution	Adjust earnings distributions.

Refreshing Compensation

When you run the Employee Compensation Application Engine process (HR_PER501A) or click the Default Pay Components button on the Compensation page, the same steps are executed, but you can update several records at once with the HR_PER501A process.

The Employee Compensation process:

- Inserts a new job row when you select Add new effective date, and uses the effective date that you entered in the As Of Date field.

Copyright © 1988-2006, Oracle. All rights reserved.

Alternatively, it updates the job row that is effective as of the date that you select in the As Of Date field.

- Updates any future rows (rows are considered future if they come into effect after the as of date) when you select Update Future Rows.
- Replaces manual changes with the new default values.

Page Used to Refresh Compensation

Page Name	Object Name	Navigation	Usage
Employee Compensation	RUNCTL_PER501	Workforce Administration, Job Information, Calculate Compensation, Employee Compensation	Use to run the Employee Compensation process to update compensation packages.

Running Job Data Reports

This section provides an overview of reporting appointments for job data changes, lists a common element, and discusses how to:

- (JPN) Run the Appointment Notification report.
- (JPN) Run the Appointment List report.
- (JPN) Run the Employee Assignment List report.

See Also

Chapter 17, "(USF) Administering Personnel Action Requests," page 601

(JPN) Understanding Reporting Appointments for Job Data Changes

When workers are newly hired or transferred, or have other job-related changes, many Japanese companies provide individual notifications of appointment to each worker. These notifications, known as appointment notifications *(Jirei),* contain different information depending on the action and action reason entered on the worker's new job record.

Periodically, many companies also distribute a listing of all new hires or transfers or other changes of job. This list is known as the appointment list *(Tsuutatsu)*.

When you run the Appointment Notification report, the report headings change according to the actions for which you are running the report—you can select actions and action reasons on the report page.

Reporting Appointments for Actions and Report Outputs

The following table illustrates what the appointment reports contain, depending on the action for which you run the report:

 Copyright © 1988-2006, Oracle. All rights reserved.

Heading and Actions	Hire and Rehire	Transfer	Promotion	Termination
Announcement date	3	3	3	3
Company description (of worker's company)	3	3		3
Department	3	3		3
Supervisor level	3	3		3
Employee status	3			
Salary plan			3	
Salary grade			3	

Note. For the actions *Transfer* and *Promotion,* the system automatically populates the Reason field. For a promotion, the system populates the field with *Grade Advance.* For a transfer, the system populates the field with *Employee Request* and *Internal Recruitment.* For all other actions in the table, you can select individual reasons (for the action that you selected) or have the system select all reasons (for the action that you selected).

With the Japanese appointment reporting functionality, if you are recording a worker's simultaneous change of department and supervisor level, enter the department change first. With both changes having the same effective date, the change of supervisor level has the higher sequence number and ensures that the system selects the changes for reporting on both the appointment notification and appointment list.

In addition, when you record job data changes with the Japanese appointment reporting functionality, reports are available for the following actions:

- Hire
- Rehire
- Termination
- Transfer
- Promotion

Sorting Appointment Lists Using Tree Structures and Definitions

To have the system sort appointment lists by department and supervisor level, use the standard tree building features to create a tree structure and reporting definition for supervisor levels, and a reporting definition for departments. You then need to select only the Refer to the Tree Manager check box on the report page to have the system use your DEPT_SECURITY tree and, depending on the job action and reason to which the appointment information relates, your SUPERVISOR_LEVEL tree.

Copyright © 1988-2006, Oracle. All rights reserved.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Common Element Used in This Section

Show Components Select if you want your report to display compensation component information.

Pages Used to Run Job Data Reports

Page Name	Object Name	Navigation	Usage
Personnel Actions History	RUNCTL_PER015	Workforce Administration, Job Information, Reports, Personnel Actions History	Run the Personnel Actions History report (PER015), which lists all workers affected by each of the job actions that you enter.
Pending Future Actions	RUNCTL_ASOFDT_COMP	Workforce Administration, Workforce Reports, Pending Future Actions	Run the Pending Future Actions report (PER021), which lists all workers with job action notices scheduled for a future date.
Department Action Notices	PRCSRUNCNTL	Workforce Administration, Workforce Reports, Department Action Notices	Run the Department Action Notices report (PER001). This report lists action notices that are tied to a time period or expiration date. Use it as a reminder of selected personnel action notices. **Note.** Run the Refresh Employees Table process before running this report.
Employees on Leaves of Absence	PRCSRUNCNTL	Workforce Administration, Job Information, Reports, Employees on Leave of Absence	Run the Employees on Leave of Absence report (PER005). This report lists all workers on leave and their expected return dates. Use this report to compare the return date that you entered in PeopleSoft Enterprise Human Resources with the worker's expected return date, or as a reminder to enter the return from leave information. **Note.** Run the Refresh Employees Table process before running this report.

Copyright © 1988-2006, Oracle. All rights reserved.

Page Name	Object Name	Navigation	Usage
Temporary Employees	RUNCTL_ASOFDATE	Workforce Administration, Job Information, Reports, Temporary Employees	Run the Temporary Employees report (PER007). This report provides an alphabetical list of all workers marked as temporary, along with length of service and other details of employment.
Years of Service	RUNCTL_PER003	Workforce Administration, Job Information, Reports, Years of Service	Run the Years of Service report (PER003). This report lists workers who have completed the number of years of service that you specify, as of the point in time that you specify. Use this report as a reminder of workers who are eligible for vested benefits plans or service recognition awards.
Primary Job Audit	RUNCTL_PER058	Workforce Administration, Workforce Reports, Primary Job Audit	Run the Primary Job Audit report (PER058). Use this report to check for discrepancies in the primary job designation for workers with multiple jobs. Run this report regularly to correct discrepancies in worker job records.
Employee Turnover Analysis	RUNCTL_FROMTHRU	Workforce Administration, Workforce Reports, Employee Turnover Analysis	Run the Employee Turnover Analysis report (PER010). This report lists each department ID and provides the worker counts as of the date that you specify.
Official List	RUNCTL_PER054_ESP	Workforce Administration, Workforce Reports, Official List ESP	Run the Spanish Official List report (PER054ES), which compiles the information that you need for Matricula book reporting. You can run the report for all matricula books, which includes historical worker data, or for the current book only, which includes only current data.

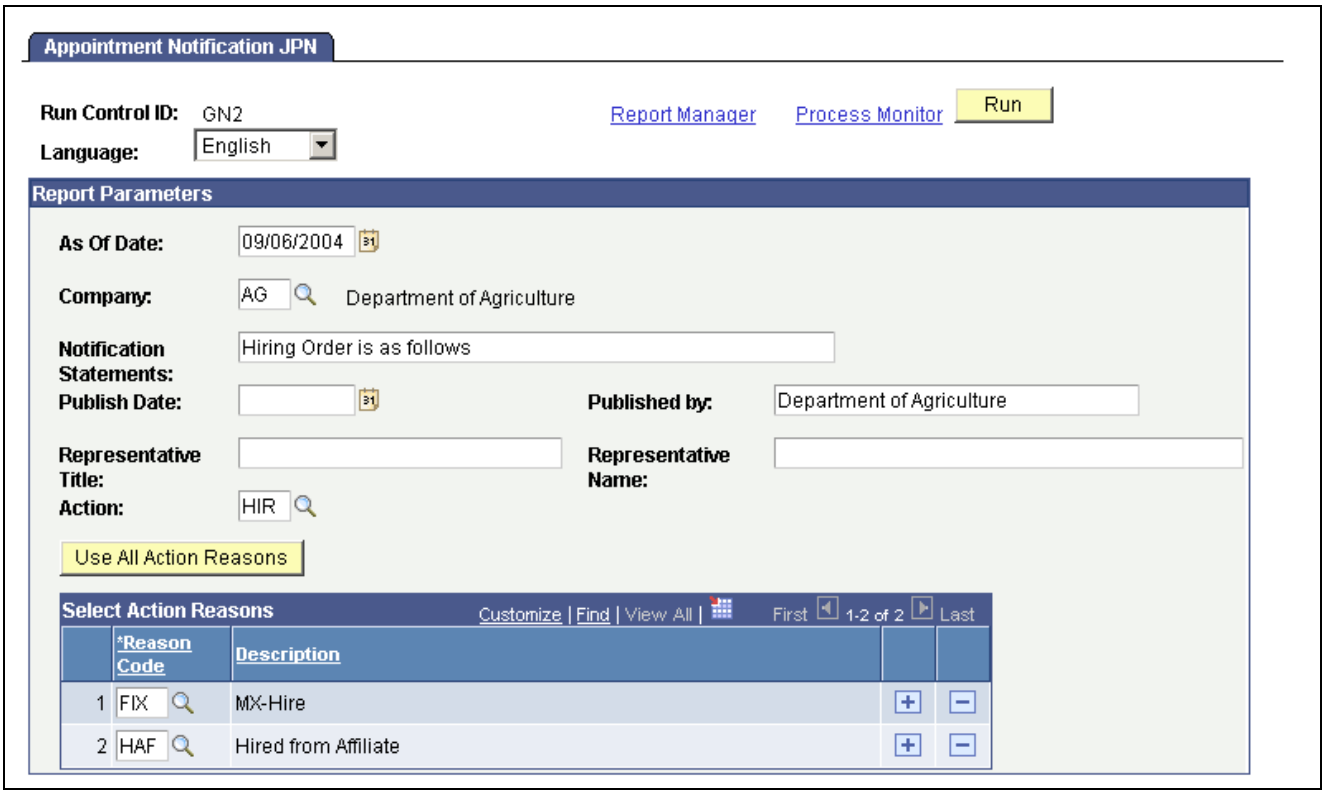
Copyright © 1988-2006, Oracle. All rights reserved.

Page Name	Object Name	Navigation	Usage
Appointment Notification JPN	RUNCTL_NTF_JPN	Workforce Administration, Job Information, Reports, Appointment Notification JPN	Run the JPN Appointment Notifications report (PER063JP). Depending on the combination of action and reason that you use in the run control, this report prints individual worker notifications of hire, rehire, termination, transfer, and promotion.
Appointment List JPN	RUNCTL_NTF2_JPN	Workforce Administration, Job Information, Reports, Appointment List JPN	Run the Appointment List JPN report (PER064JP), which generates an appointment list. This report lists all workers who have been hired, rehired or retired, transferred or promoted. The information that the report provides varies according to the combination of action and reason that you enter on the Appointment List report page.
(JPN) Employee Assignment List	RUNCTL_EMPLIST_JPN	Workforce Administration, Job Information, Reports, Employee Assignment List JPN	Print the JPN Employee Assignment List report (PER066JP), which lists workers by department, including additional appointment employees.

(JPN) Running the Appointment Notification Report

Access the Appointment Notification JPN page.

Copyright © 1988-2006, Oracle. All rights reserved.



Appointment Notification JPN page

Report headings vary according to the combination of action and reason. Enter free-form text and a company official's title and name to appear on the report, and select the action and reason combinations on which you want to report.

Language Select the language for the report.

As of Date This is the effective date of worker job data rows that the system searches and report on. It appears on the report as the announcement date.

Note. For termination notifications, enter the effective date of the termination row on the worker's job record. The system sets the announcement date on the printed notification as the As of Date minus 1 day, the same as the termination date on the worker's Employment Dates page.

Company Select your company code. The company description appears by default in the Published by field.

Notification Statements Enter any comments that you want to appear as an introduction to the list on the report: for example, *Hiring order is as follows.*

Publish Date Enter the publish date. This date, which appears on the report, is the date that your organization wants as the official publication date of the appointment notification.

Published by Displays the description of the company that you entered, but you can override the default with a free-form description of, for example, your human resources department.

Copyright © 1988-2006, Oracle. All rights reserved.

Representative Title Displays the default from the company table. You can override the default. This is the title of the company's representative that appears on the notification.

Representative Name Displays the default from the company table. You can override the default. This is the name of the company's representative that appears on the notification.

Action Select an action that you want to report on. You can only select *Hire, Rehire, Transfer, Promotion,* or *Termination.*

Use All Action Reasons Click this button unless you want to select individual reasons for the action that you entered in the Reason Code grid. Even if you selected individual reasons in the grid, if you click this button, the system loads all reasons.

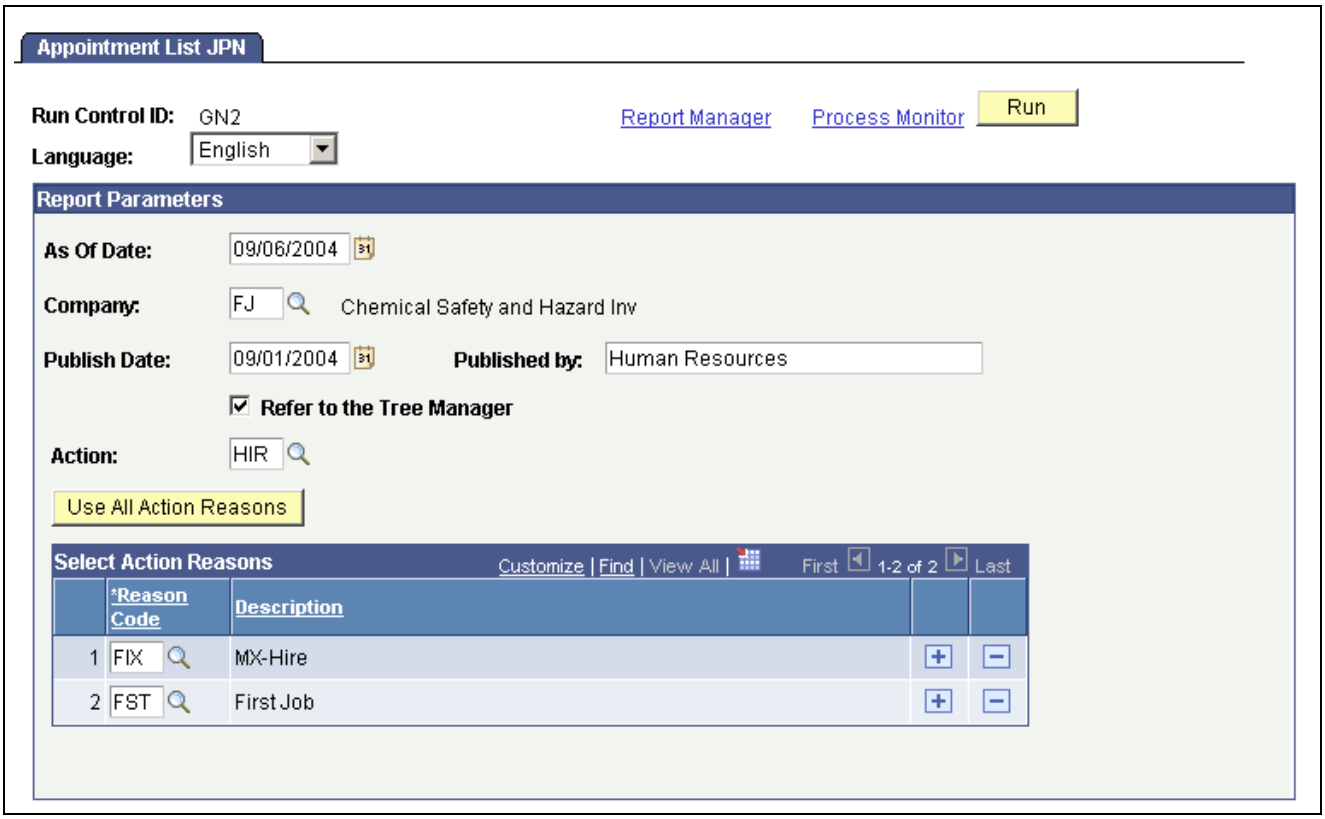
Note. You only need to select reasons (individual or all) for actions *Hire, Rehire,* and *Termination.* For actions *Transfer* and *Promotion,* the system automatically populates the Reason Code field. However, the process reports only job rows that have a reason code. If a job row has an action of *Hire, Rehire, Termination, Transfer,* or *Promotion,* but no action reason, the system does not report it.

Reason Code Select all the reasons for the action that you entered that you want the report to include. If the Use All Action Reasons check box is cleared, you must enter at least one reason in this field. The system displays the description of each reason that you select. See the previous note that discusses the Use All Action Reasons field.

(JPN) Running the Appointment List Report

Access the Appointment List JPN page.

Copyright © 1988-2006, Oracle. All rights reserved.



Appointment List JPN page

You can enter free-form text and a company official's title and name to appear on the report, and you can select the action and reason combinations that you want to report on.

As Of Date This is the effective date of worker job data rows on which the system will search and report.

Note. For *Termination* listings, you should enter the effective date of the job termination row. The system sets the announcement date on the printed list as the As Of Date minus 1 day, the same as the termination date on the worker's Employment Dates page.

Company Select your company code. Unlike for appointment notification, the company description does *not* appear by default in the Published by field.

Publish Date Enter a publish date. This date, which appears on the report, is the date that your organization wants as the official publication date of the appointment list.

Published by Enter a free-form description of the publishing department, such as your human resources department.

Refer to the Tree Manager Select this check box if you want the system to sort the listing by using the DEPT_SECURITY tree and, depending on the action and reasons, the SUPERVISOR_LEVEL tree.

This is how the system sorts the listing when you select this check box:

- For actions *Hire* and *Rehire,* the system uses only the DEPT_SECURITY tree.

Copyright © 1988-2006, Oracle. All rights reserved.

- For actions *Transfer* and *Termination,* the system uses both the DEPT_SECURITY tree and the SUPERVISOR_LEVEL tree.
- For action *Promotion,* the system sorts by salary plan, salary grade, and employee ID, whether the check box is selected or cleared.

  Trees have no effect.

If the Refer to the Tree Manager option is cleared, the system sorts the list by employee ID.

Note. Workers who do not have a supervisor level appear in the list by department, with the Supervisor Level column blank. They are sorted by employee ID, after all the workers who do have a supervisor level.

Action Select an action that you want to report on. You can only select *Hire, Rehire, Transfer, Promotion,* or *Termination.*

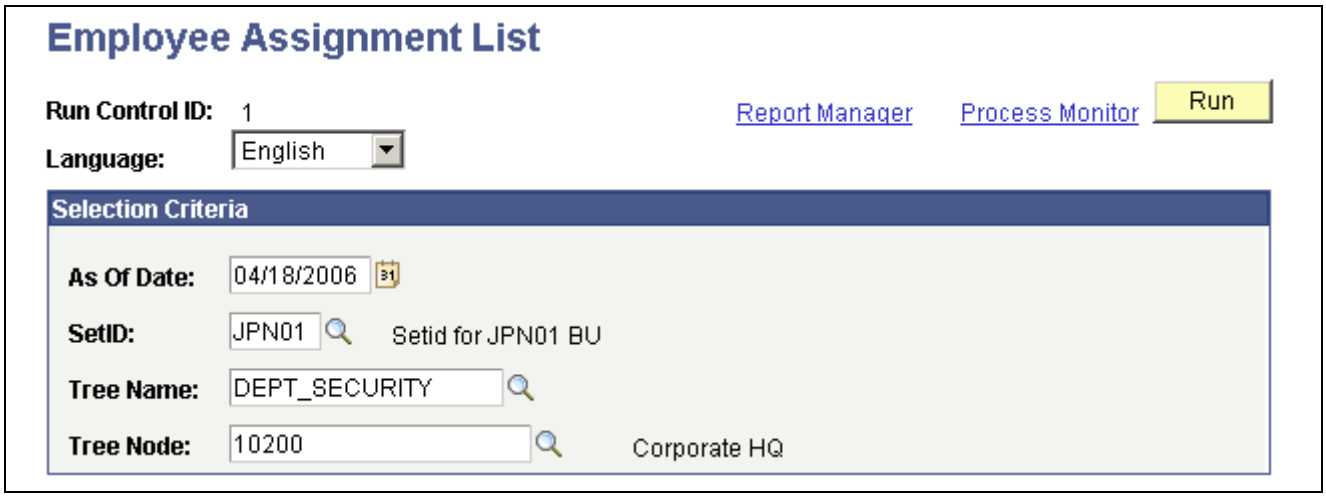
Use All Action Reasons Click this button unless you want to select individual reasons for the action that you entered in the Reason Code grid. Even if you have selected individual reasons in the grid, if you click this button, the system loads all reasons.

Note. You need to select reasons only for actions *Hire, Rehire,* and *Termination.* For actions *Transfer* and *Promotion,* the system automatically populates the Reason Code field. However, the process reports only job rows that have an action reason. If a job row has an action of *Transfer* or *Promotion,* but no action reason, the system does not report it.

Reason Code Select all the reasons for the action that you entered that you want the report to include. If you click the Use All Action Reasons button, you must enter at least one reason in this field. The system displays the description of each reason that you select. See the note above for the Use All Action Reasons field.

(JPN) Running the Employee Assignment List Report

Access the JPN Employee Assignment List page.



JPN Employee Assignment List run control page

This report lists workers by department and supervisor level, including workers with additional appointments.

Copyright © 1988-2006, Oracle. All rights reserved.

To run the report, at least one department tree must be created. For the purposes of department security, the DEPT_SECURITY tree usually already exists. You can either select this tree or create a new department hierarchy beneath the DEPARTMENT tree structure.

The report is sorted by department, and then by workers:

- With supervisor levels registered in the Supervisor Level tree, in tree order.
- With supervisor levels not registered in the Supervisor Level tree, in alphanumeric supervisor level order.
- Without supervisor levels, in alphanumeric employee ID order.

Note. The Supervisor Level tree that the system uses for sorting is the one used for the Appointment Notification and Appointment List reports. It must be named SUPERVISOR_LEVEL. If you have not defined a Supervisor Level tree with that name, sorting is in alphanumeric supervisor level order.

Viewing a Summary of All Job Records

This section lists the page used to view a summary of all jobs records held by a person.

Page Used to View a Summary of All Job Records

Page Name	Object Name	Navigation	Usage
Multiple Jobs	MULTIPLE_JOBS	Workforce Administration, Job Information, Review Job Information, Multiple Jobs Summary	View a summary of all jobs and changes in job status for people that have more than one employment record.

Refreshing Tables to Facilitate Reporting

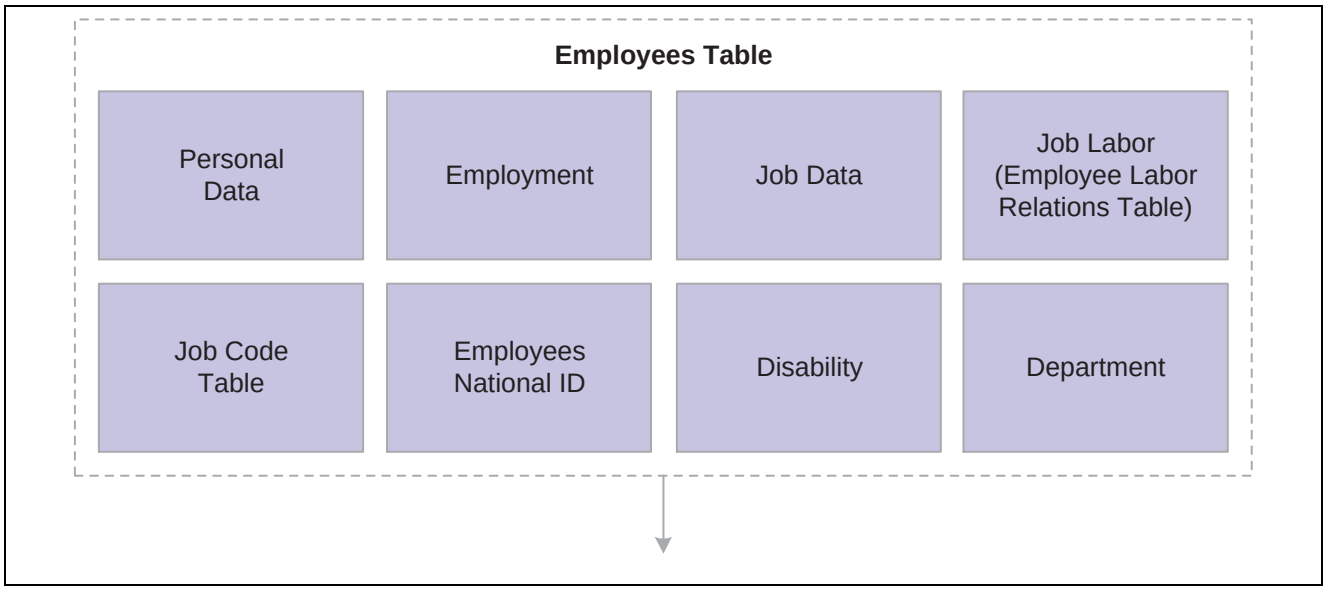
This section provides overviews of the process of refreshing the Employees table and the process of refreshing the Personal Data table, lists a common element, and lists the pages used to refresh tables to facilitate reporting.

Understanding the Process of Refreshing the Employees Table

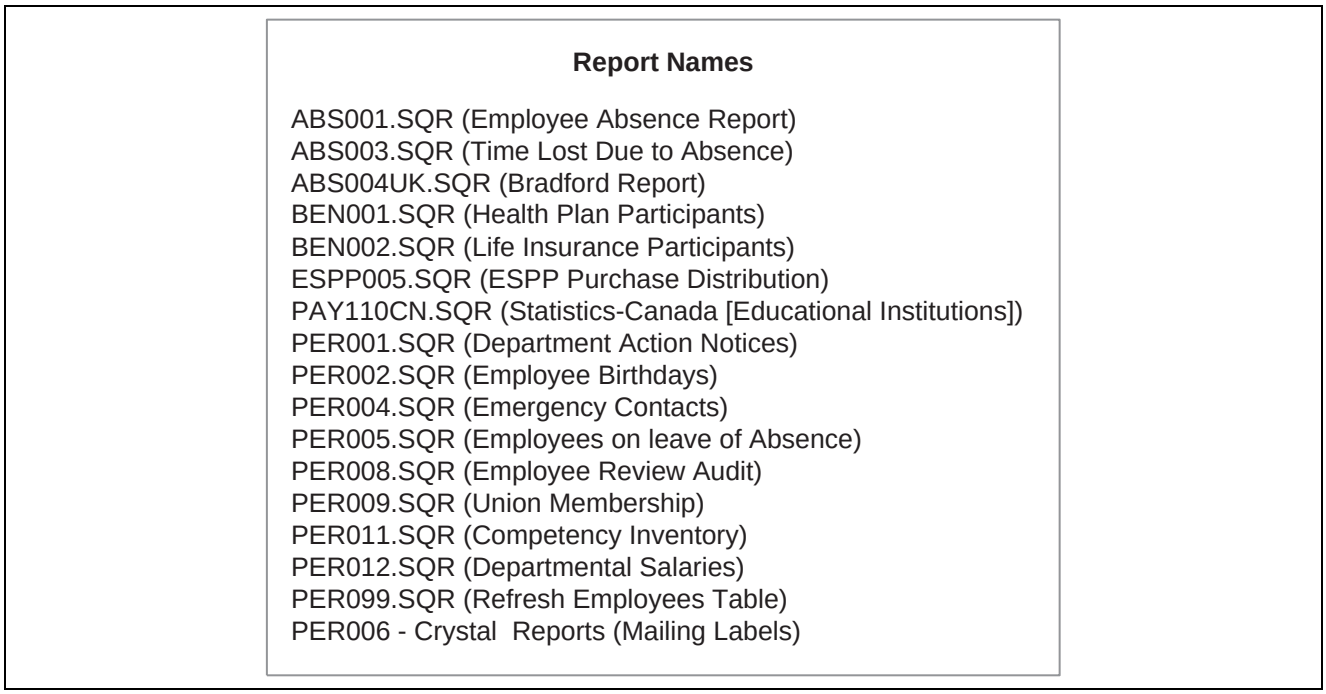
To generate standard PeopleSoft Enterprise Human Resources reports quickly, many human resources reports retrieve data from the Employees table (PS_EMPLOYEES). To make reporting in PeopleSoft Enterprise Human Resources more efficient, this table combines information from the following tables: PERSON, PERS_DATA_EFFDT, NAMES, ADDRESSES, PERSONAL_PHONE, Job (JOB), Employment Data (EMPLOYMENT), Job Code (JOBCODE_TBL), Department (DEPARTMENT_TBL), Employees National IDs (PERS_NID), Job Labor (JOB_LABOR), and Disability (DISABILITY) into an extract file. The extract file's sole purpose is as a report source. Because it isn't updated dynamically when you add people or job records to the system or update their data (doing so would have negative online processing impact), you must refresh the Employees table before running any reports.

When you run this process, the system updates the EMPLOYEES table with data that is valid before or on the as-of date that you specify. When retrieving data from setup components such as the Department component and Job Code pages, the system uses the effective date of the specific job data record that the data relates to.

Copyright © 1988-2006, Oracle. All rights reserved.



Updating the Employees table by using the Refresh Employees Table process (1 of 2)



Updating the Employees table by using the Refresh Employees Table process (2 of 2)

A useful feature of the Employees table is that you can refresh it to show a specific date, so you can report based on how things were at that time. This might be useful if an organization needed to reconstruct its organization over the last several years to research its promotion policies.

Update the Employees table using the Refresh Employees Table Application Engine process (PER099) before running any of these reports so that the report contains all changes made to your employee files.

Copyright © 1988-2006, Oracle. All rights reserved.

Understanding the Process of Refreshing the Personal Data Table

PeopleSoft Enterprise Human Resources reports also retrieve data from the Personal Data table. This table combines information from these tables: PERSON, PERS_DATA_EFFDT, NAMES, ADDRESSES, PERSONAL_PHONE. Like the Employees table, the Personal Data table is a report source only. It updates through the process described below. The Personal data table is synchronized with the online changes by using a Message Subscription process on the message PERSON_BASIC_SYNC. This means that any process that publishes the PERSON_BASIC_SYNC message causes the Personal Data table to be updated. You may want to refresh the Personal Data table before running reports, but the online process should keep it up to date. You can refresh the Personal Data table at any time without affecting the online updates.

Common Element Used in This Section

As Of Date Indicate the As Of Date to run the processes. The process selects the new data based on the date that you enter and populates the table. It includes only workers who are active, on leave of absence, or suspended. The process excludes any *terminated* workers.

Pages Used to Refresh Tables to Facilitate Reporting

Page Name	Object Name	Navigation	Usage
Refresh Employees Table - Parameters	RUNCTL_ASOFDATE	Set Up HRMS, System Administration, Database Processes, Refresh EMPLOYEES Table	Reflect back to a specific date or period for employee data reporting.
Refresh Personal Data	PRCSRUNCNTL	Set Up HRMS, System Administration, Database Processes, Refresh Personal Data	Update the Personal Data table.
Ad-Hoc Process Request	PRCSRUNCNTL	Workforce Administration, Workforce Reports, Request Ad-hoc Process	Run several or all Administer Workforce reports that do not require parameters.
As-of Date Request	RUNCTL_ASOFDATE	Workforce Administration, Workforce Reports, Create As-of Date Request	Run several or all Administer Workforce reports for which you specify an as of date.
Calendar Year Request	RUNCTL_CALENDARYR	Workforce Administration, Workforce Reports, Create Calendar Year Request	Run several or all Administer Workforce reports for which you specify a calendar year.
From/Thru Dates Request	RUNCTL_FROMTHRU	Workforce Administration, Workforce Reports, Create From/Thru Dates Request	Run several or all Administer Workforce reports for which you specify a from and through date range.

Copyright © 1988-2006, Oracle. All rights reserved.

Running Database Audits

Database audits monitor changes, additions, or deletions made to sensitive fields such as salary amounts.

Page Used to Run Database Audits

Page Name	Object Name	Navigation	Usage
Database Audit	RUNCTL_FROMTHRU	Workforce Administration, Workforce Reports, Database Audit	Run the Database Audit report (PER029).

Copyright © 1988-2006, Oracle. All rights reserved.

CHAPTER 16

Viewing Summary Workforce Information

This chapter discusses how to:

- View worker job history.
- (USF) View employee personal and job data.
- View other summary pages in PeopleSoft Enterprise Human Resources.

Viewing Worker Job History

Viewing worker job history provides a quick summary of important job details of current and historic work records.

This section discusses how to:

- View worker job history.
- View compensation information.

Pages Used to View Employee Job History

Page Name	Object Name	Navigation	Usage
Workforce Job Summary	WF_JOB_SUMMARY	Workforce Administration, Job Information, Review Job Information, Workforce Job Summary, Workforce Job Summary	View an employee's job history.
Job Summary JPN	JOB_SUMMARY_JPN	Workforce Administration, Job Information, Review Job Information, Job Summary JPN, Job Summary JPN	View a Japanese employee's job history.
Salary Components	COMP_JOB_SUMM_SEC	Click the Components link on the Compensation tab of the Workforce Job Summary page.	View compensation information.
Rate Code	WCS_RTCD_DETAILS	Click the Details link on the Controls tab of the on the Salary Components page.	Review the description, compensation rate type, and rate code class associated with the rate code.

Copyright © 1988-2006, Oracle. All rights reserved.

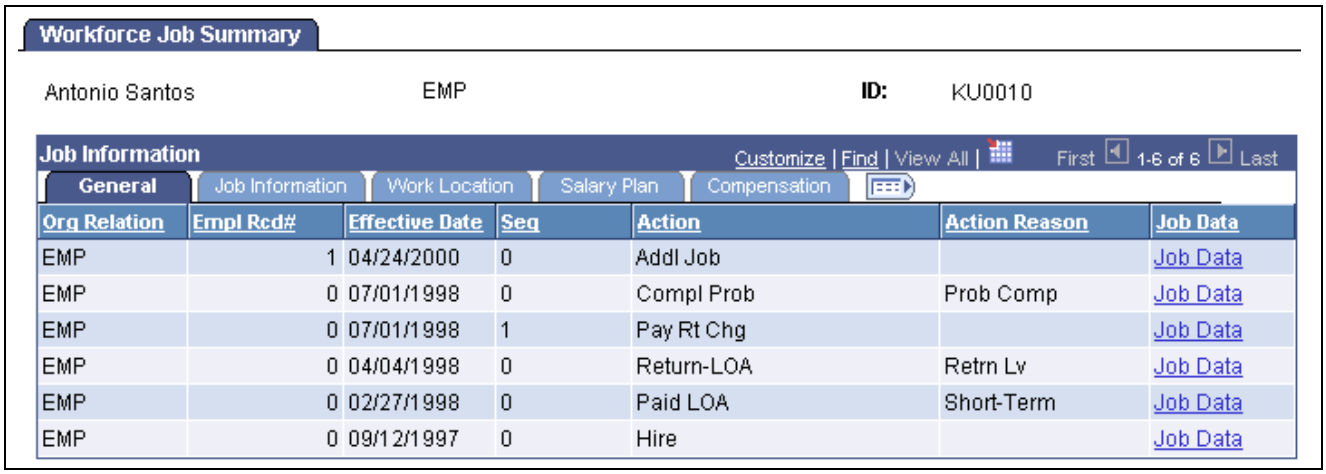
See Also

Chapter 5, "Adding a Person in PeopleSoft Human Resources," page 109

Chapter 18, "(USF) Processing Personnel Action Requests," page 621

Viewing Worker Job History

Access the Workforce Job Summary page.



Workforce Job Summary page

The Job Summary page displays the person's name, organizational relationship, and ID.

Common Page Information

Effective Date and **Seq** (sequence) — Displays the effective date and effective date sequence, if any, for each personnel action. The sequence tracks actions that occur on the same day.

Org Relation (organizational relationship) — Indicates the type of organizational relationship, *EMP* (employee), *CWR* (contingent worker), or *POI* (person of interest).

Empl Rcd# (employment record number) — The sequential number of the employment instance for the same ID.

General

Select the General tab.

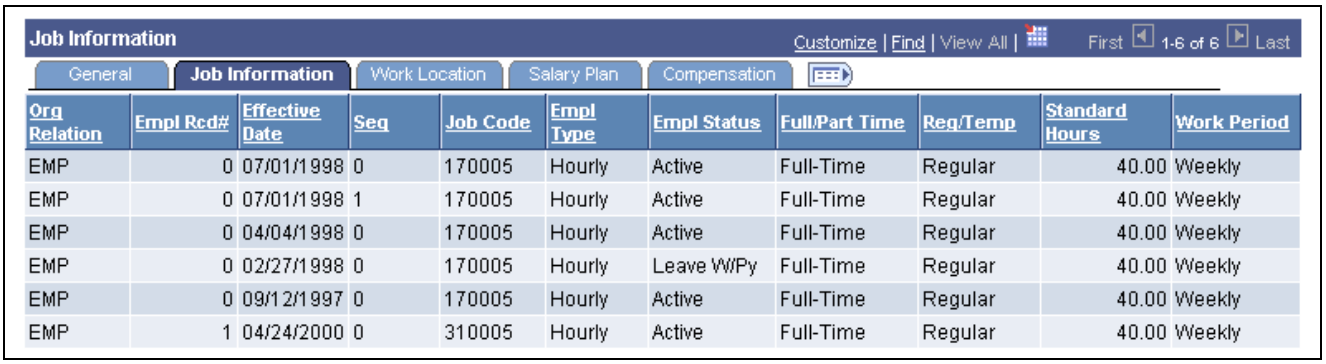
Action and **Action Reason** — Displays the action taken and reason for the row's existence.

Job Data — Click this link to display the Job Data component pages for a specific row.

Job Information

Select the Job Information tab.

Copyright © 1988-2006, Oracle. All rights reserved.



Job Information — Customize | Find | View All | First 1-6 of 6 Last

General | Job Information | Work Location | Salary Plan | Compensation

Org Relation	Empl Rcd#	Effective Date	Seq	Job Code	Empl Type	Empl Status	Full/Part Time	Reg/Temp	Standard Hours	Work Period
EMP	0	07/01/1998	0	170005	Hourly	Active	Full-Time	Regular	40.00	Weekly
EMP	0	07/01/1998	1	170005	Hourly	Active	Full-Time	Regular	40.00	Weekly
EMP	0	04/04/1998	0	170005	Hourly	Active	Full-Time	Regular	40.00	Weekly
EMP	0	02/27/1998	0	170005	Hourly	Leave W/Py	Full-Time	Regular	40.00	Weekly
EMP	0	09/12/1997	0	170005	Hourly	Active	Full-Time	Regular	40.00	Weekly
EMP	1	04/24/2000	0	310005	Hourly	Active	Full-Time	Regular	40.00	Weekly

Workforce Job Summary page: Job Information tab

Job Code Displays the job code information for this worker after each personnel action.

Empl Type (employee type) Displays the worker type after each personnel action.

Empl Status (employee status) Displays the worker's status after each personnel action.

Full/Part Time Indicates whether the worker is full or part time after each personnel action.

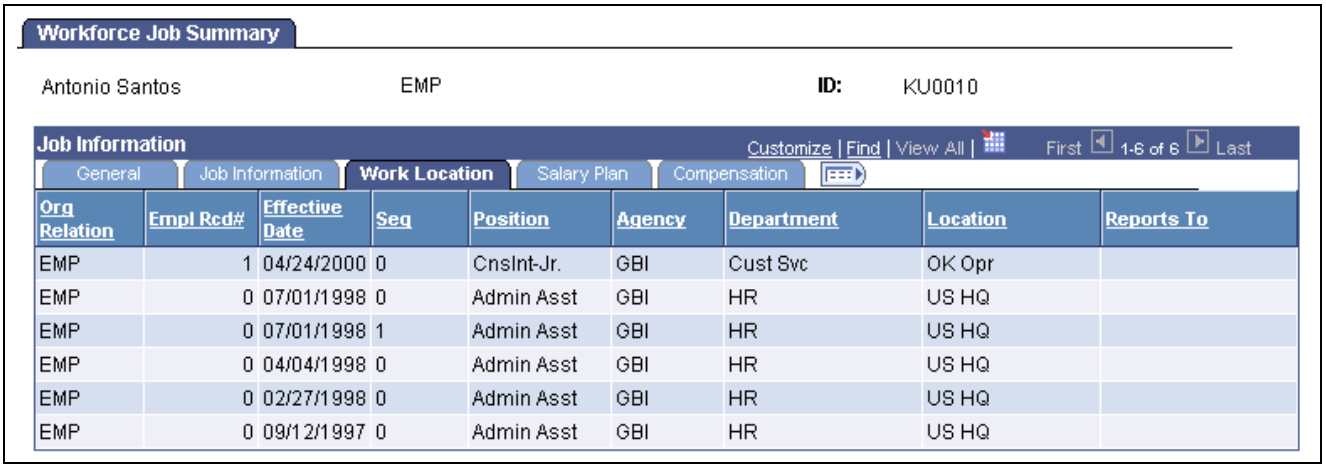
Reg/Temp Indicates whether the worker is regular or temporary after each personnel action.

Standard Hours Displays the standard hours per work period after each personnel action.

Work Period Displays the work period after each personnel action.

Work Location

Select the Work Location tab.



Workforce Job Summary

Antonio Santos EMP ID: KU0010

Job Information — Customize | Find | View All | First 1-6 of 6 Last

General | Job Information | Work Location | Salary Plan | Compensation

Org Relation	Empl Rcd#	Effective Date	Seq	Position	Agency	Department	Location	Reports To
EMP	1	04/24/2000	0	CnsInt-Jr.	GBI	Cust Svc	OK Opr	
EMP	0	07/01/1998	0	Admin Asst	GBI	HR	US HQ	
EMP	0	07/01/1998	1	Admin Asst	GBI	HR	US HQ	
EMP	0	04/04/1998	0	Admin Asst	GBI	HR	US HQ	
EMP	0	02/27/1998	0	Admin Asst	GBI	HR	US HQ	
EMP	0	09/12/1997	0	Admin Asst	GBI	HR	US HQ	

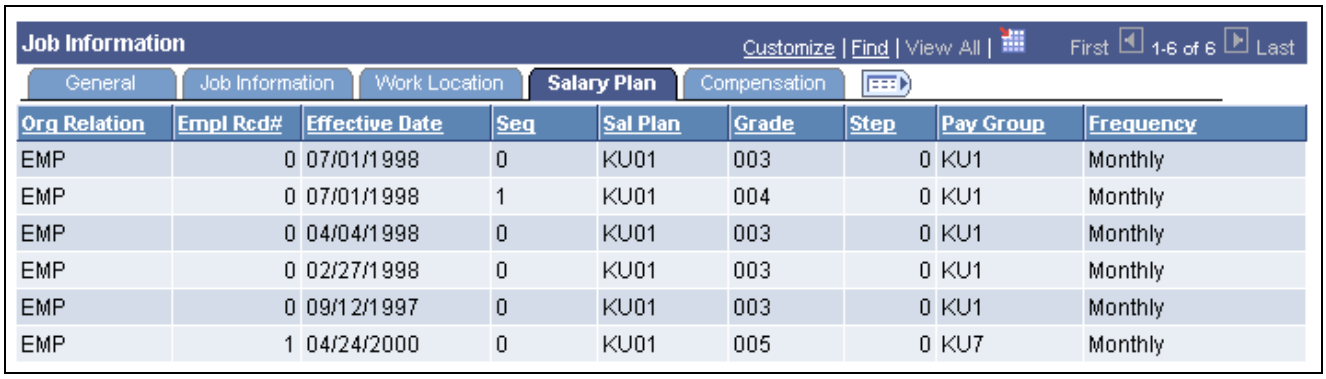
Workforce Job Summary page: Work Location tab

Position, Agency, Department, Location, Reports To The workers position, company code, department , location, and supervisor after each personnel action.

Salary Plan

Select the Salary Plan tab.

Copyright © 1988-2006, Oracle. All rights reserved.



Job Information — Customize | Find | View All | First 1-6 of 6 Last

General | Job Information | Work Location | **Salary Plan** | Compensation

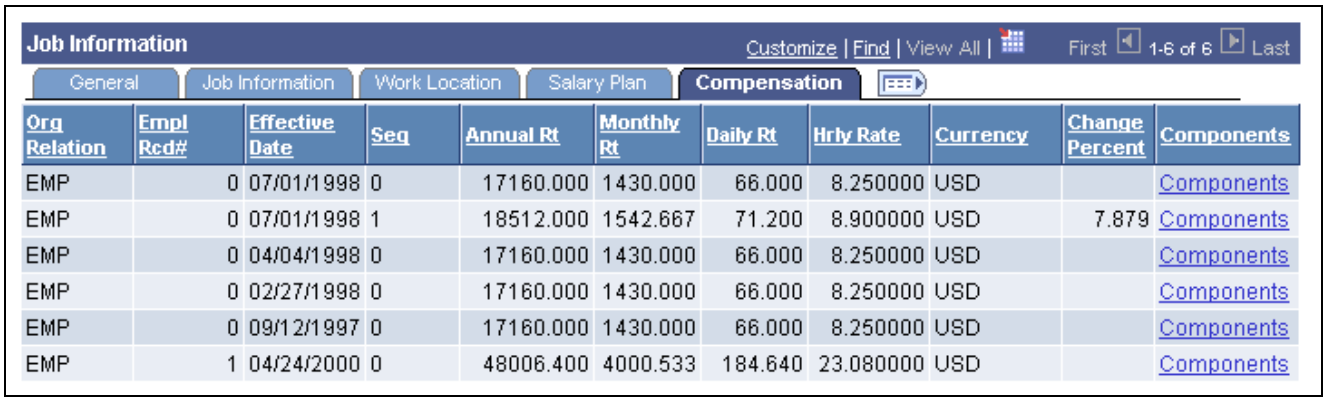
Org Relation	Empl Rcd#	Effective Date	Seq	Sal Plan	Grade	Step	Pay Group	Frequency
EMP	0	07/01/1998	0	KU01	003	0	KU1	Monthly
EMP	0	07/01/1998	1	KU01	004	0	KU1	Monthly
EMP	0	04/04/1998	0	KU01	003	0	KU1	Monthly
EMP	0	02/27/1998	0	KU01	003	0	KU1	Monthly
EMP	0	09/12/1997	0	KU01	003	0	KU1	Monthly
EMP	1	04/24/2000	0	KU01	005	0	KU7	Monthly

Workforce Job Summary page: Salary plan tab

Sal Plan (salary plan), **Grade, Step, Pay Group,** and **Frequency** — Displays the worker's salary plan, grade, step, pay group, and payment frequency after each personnel action.

Compensation

Select the Compensation tab.



Job Information — Customize | Find | View All | First 1-6 of 6 Last

General | Job Information | Work Location | Salary Plan | **Compensation**

Org Relation	Empl Rcd#	Effective Date	Seq	Annual Rt	Monthly Rt	Daily Rt	Hrly Rate	Currency	Change Percent	Components
EMP	0	07/01/1998	0	17160.000	1430.000	66.000	8.250000	USD		Components
EMP	0	07/01/1998	1	18512.000	1542.667	71.200	8.900000	USD	7.879	Components
EMP	0	04/04/1998	0	17160.000	1430.000	66.000	8.250000	USD		Components
EMP	0	02/27/1998	0	17160.000	1430.000	66.000	8.250000	USD		Components
EMP	0	09/12/1997	0	17160.000	1430.000	66.000	8.250000	USD		Components
EMP	1	04/24/2000	0	48006.400	4000.533	184.640	23.080000	USD		Components

Workforce Job Summary page: Compensation tab

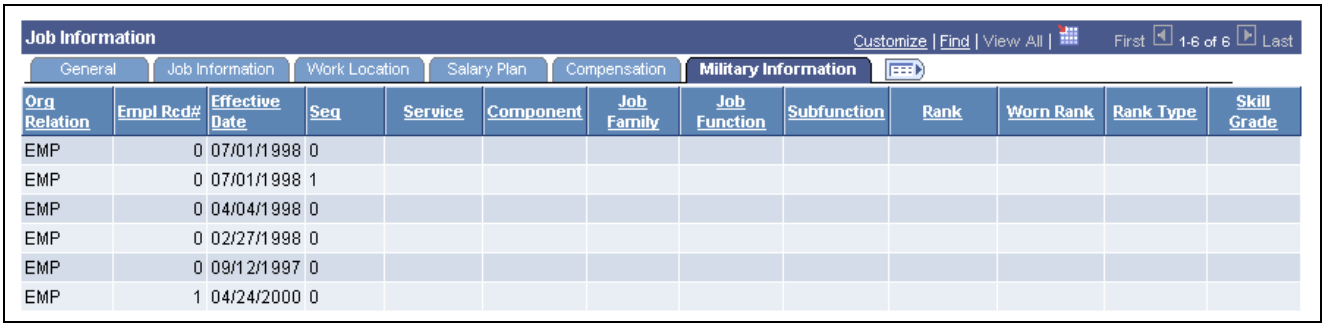
Annual Rt (annual rate), **Monthly Rt** (monthly rate), **Daily Rt** (daily rate), **Hrly Rate** (hourly rate), **Currency,** and **Change Percent** — Displays the worker's compensation rate in annual, monthly, daily, or hourly terms in the given currency. When there has been a change in the compensation rate for this employee, the system displays the percentage of change from the previous row.

Components — Click the link to access the Salary Components page.

Military Information

Select the Military Information tab.

Copyright © 1988-2006, Oracle. All rights reserved.



Org Relation	Empl Rcd#	Effective Date	Seq	Service	Component	Job Family	Job Function	Subfunction	Rank	Worn Rank	Rank Type	Skill Grade
EMP	0	07/01/1998	0									
EMP	0	07/01/1998	1									
EMP	0	04/04/1998	0									
EMP	0	02/27/1998	0									
EMP	0	09/12/1997	0									
EMP	1	04/24/2000	0									

Workforce Job Summary page: Military Information tab

Service The specific branch of armed forces (for example, Army, Navy, Air Force, Marines, and so forth)

Component The type of service (for example, Regular, Active Reserve, Inactive Reserve, Emergency Reserve, or Guard).

Job Family The job classification as defined in Job Profile Management (for example, Intelligence, Ammunitions, Medical, Aviation)

Job Function The function as defined in Job Profile Management (for example, Cryptography, Doctor, Nurse, Pilot)

Subfunction The subfunction as defined in Job Profile Management (for example, Surgeon, Pathology, Radiology, Light-wing pilot)

Rank Rank held permanently, as opposed to while serving in a particular post. When relieved of command, a holder of substantive rank remains at that rank.

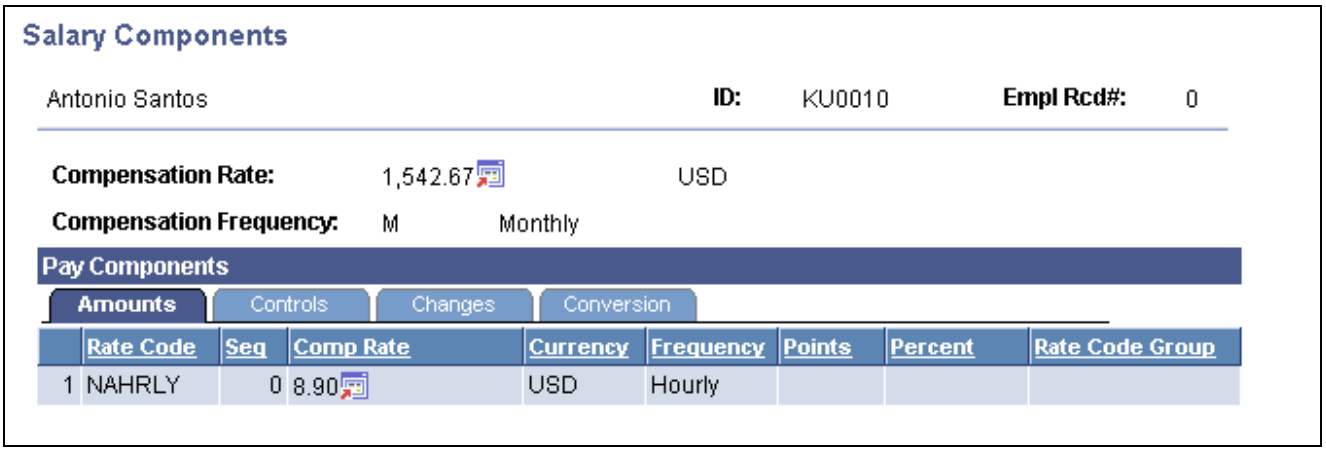
Worn Rank Actual or temporary rank held while serving in a particular post.

Rank Type The rank category (for example, Substantive, Temporary, Frocked, Acting, Acting Lacking, Honorary, Provisional, Probationary).

Skill Grade The overall evaluated grade level for the individual after the personnel action.

Viewing Compensation Information

Access the Salary Components page.



	Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1	NAHRLY	0	8.90	USD	Hourly			

Salary Components page

Copyright © 1988-2006, Oracle. All rights reserved.

Common Page Elements

Rate Code Rate codes are IDs for pay components. The system displays compensation information associated with this rate code in the compensation grid.

Seq (sequence) Indicates multiple occurrences of the same rate code.

Amounts

Select the Amounts tab.

Comp Rate (compensation rate) and **Currency** Displays the compensation rate for the pay component rate codes and the currency.

Frequency Displays the compensation frequency for the pay component's rate.

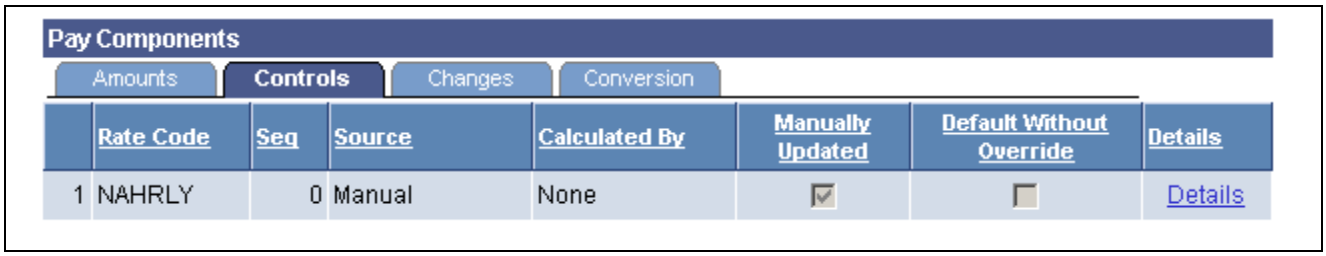
Points Displays the salary points associated with this rate code, if there are any.

Percent If the rate type for this rate code is percent, the system displays the percent to be applied to the job compensation rate or to a rate code group (if you are using rate code groups).

Rate Code Group A rate code group enables you to be more specific when calculating percentage-based components as part of your worker compensation package.

Controls

Select the Controls tab.



Salary Components page: Controls tab

Source Indicates how the pay component was assigned to the Compensation grid. *Manual* indicates that the pay component was added manually; *Salary Step* indicates that the pay component defaulted from the Salary Step; *Job Code* indicates that the pay component defaulted from the job code definition, and so on.

Calculated by Values are:

- *None:* The rate value is assigned by the Rate Code definition or manually entered.
- *Rate Matrix:* The rate value is determined by a rate code matrix.
- *Extended:* Not used.

Manually Updated Indicates whether the pay component's value was manually entered or the pay rate contains only defaulted values.

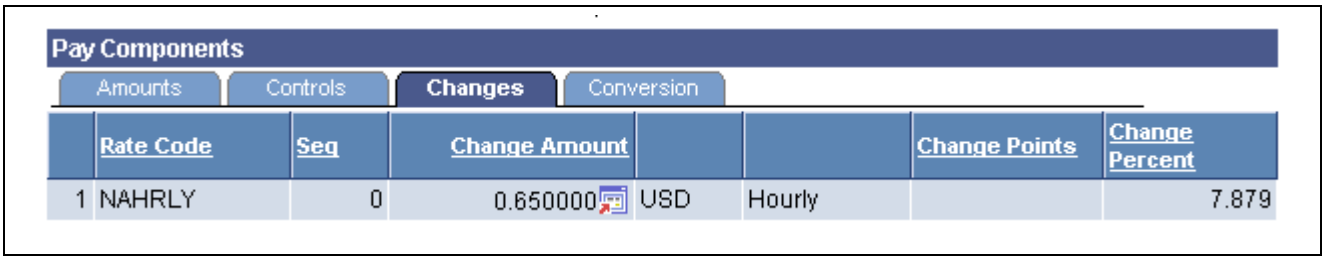
Default Without Override Indicates whether the default rate value of the pay component can be overridden.

Copyright © 1988-2006, Oracle. All rights reserved.

Details Click to access the Comp Rate Code page and review the description, compensation rate type, and rate code class associated with the rate code.

Changes

Select the Changes tab.



Salary Components page: Changes tab

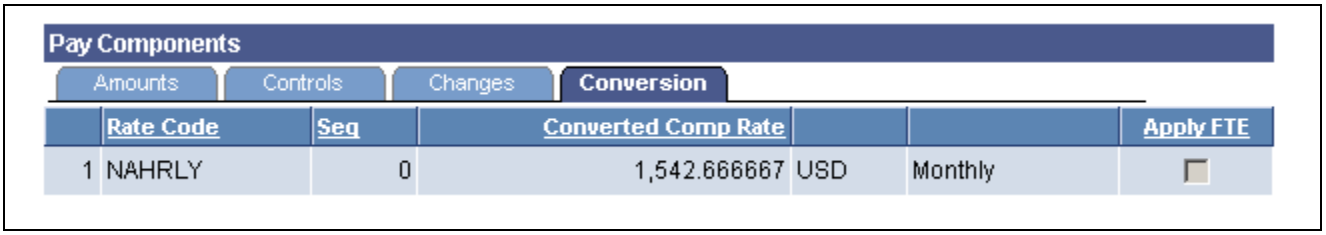
Change Amount Displays the overall change amount in this pay component rate relative to the previous Job Data row.

Change Points Displays the overall change amount (in points) for this pay component. This field is visible only if Salary Points is selected on the Installation Table page.

Change Percent Displays the overall change amount for this pay component. This field isn't available for rate codes that have a rate code type of percent or points.

Conversion

Select the Conversion tab.



Salary Components page: Conversion tab

Converted Comp Rate (converted compensation rate) Displays the converted compensation rate for this pay component. The system converts all base pay components to the currency and compensation frequency specified.

Apply FTE (apply full time equivalent) Indicates that the value associated with the rate code is to be multiplied by the FTE factor for annualization and deannualization. FTE is the percent of full time the employee should normally work in the corresponding job. This field isn't applicable for rate codes of type percent.

(USF) Viewing Employee Personal and Job Data

Use the Personal Data inquiry component to view employee personal and job data.

This section discusses how to:

Copyright © 1988-2006, Oracle. All rights reserved.

- View employee personal data.
- View employee job data.
- View employee benefit programs.

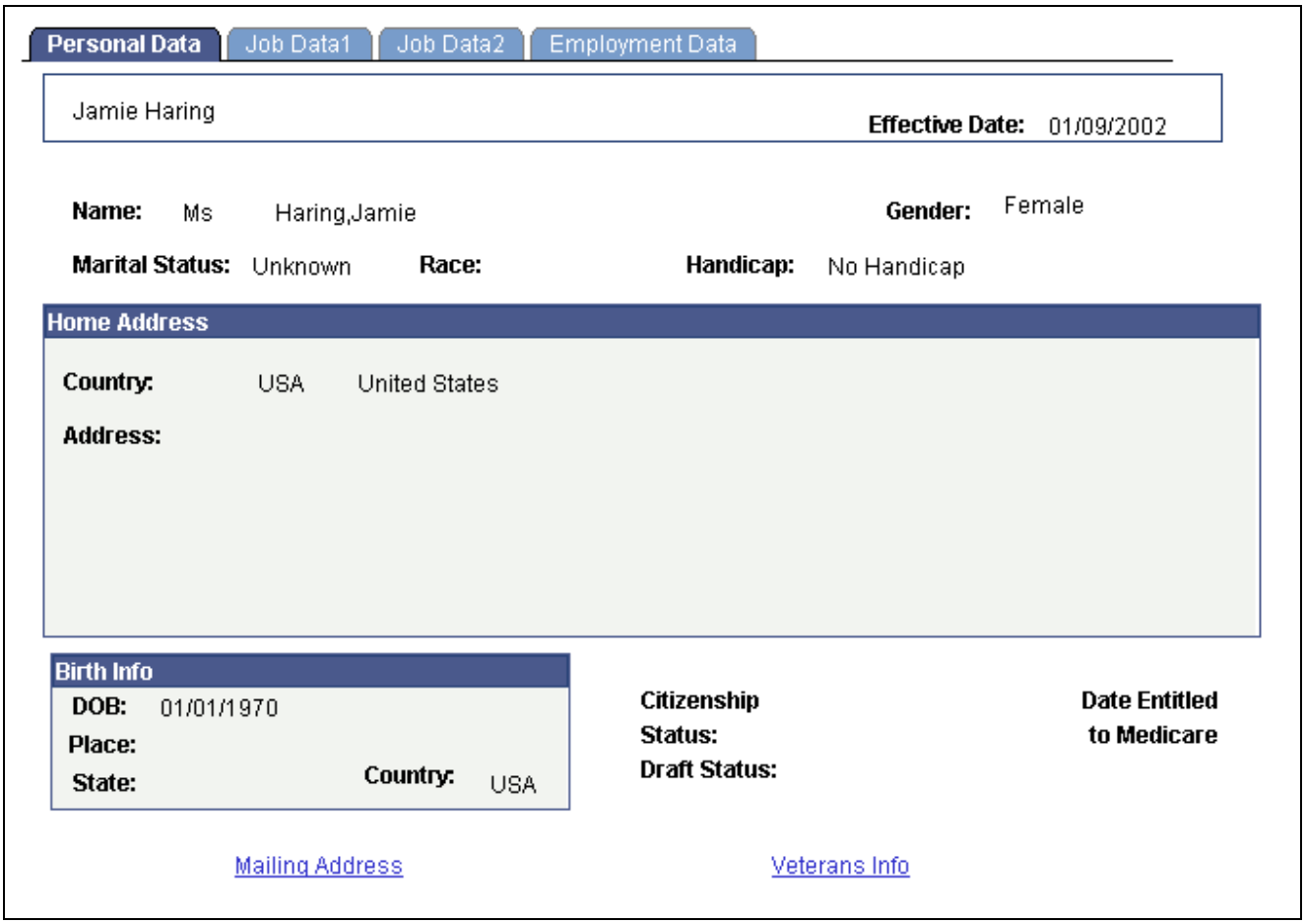
Pages Used to View Personal and Job Data

Page Name	Object Name	Navigation	Usage
Personal Data	GVT_PERS_INQ	Workforce Administration, Job Information, Review Job Information, Personal Data USF, Personal Data	View employee personal data.
Mailing Address	GVT_MAILADDR_SEC	Click the Mailing Address link on the Personal Data page.	View the employee's mailing address.
Veterans Info (veterans information)	GVT_VETINF_INQ_SEC	Click the Veterans Info link on the Personal Data page.	View veteran's information for this employee.
Job Data1	GVT_JOB_INQ	Workforce Administration, Job Information, Review Job Information, Personal Data USF, Job Data1	View employee job data.
Benefits/Retirement Data	GVT_BENDAT_INQ_SEC	Click the Benefits/FEHB Data link on the Job Data1 page.	View the benefit program in which the employee is enrolled for benefits in PeopleSoft Enterprise Human Resources or in PeopleSoft Enterprise Benefits Administration.
Job Data2	GVT_JOB_INQ2	Workforce Administration, Job Information, Review Job Information, Personal Data USF, Job Data2	View additional job data, including quoted pay and expected pay information.
Employment Data	GVT_EMPLOY_INQ	Workforce Administration, Job Information, Review Job Information, Personal Data USF, Employment Data	View employment data.

Viewing Employee Personal Data

Access the Personal Data page.

Copyright © 1988-2006, Oracle. All rights reserved.



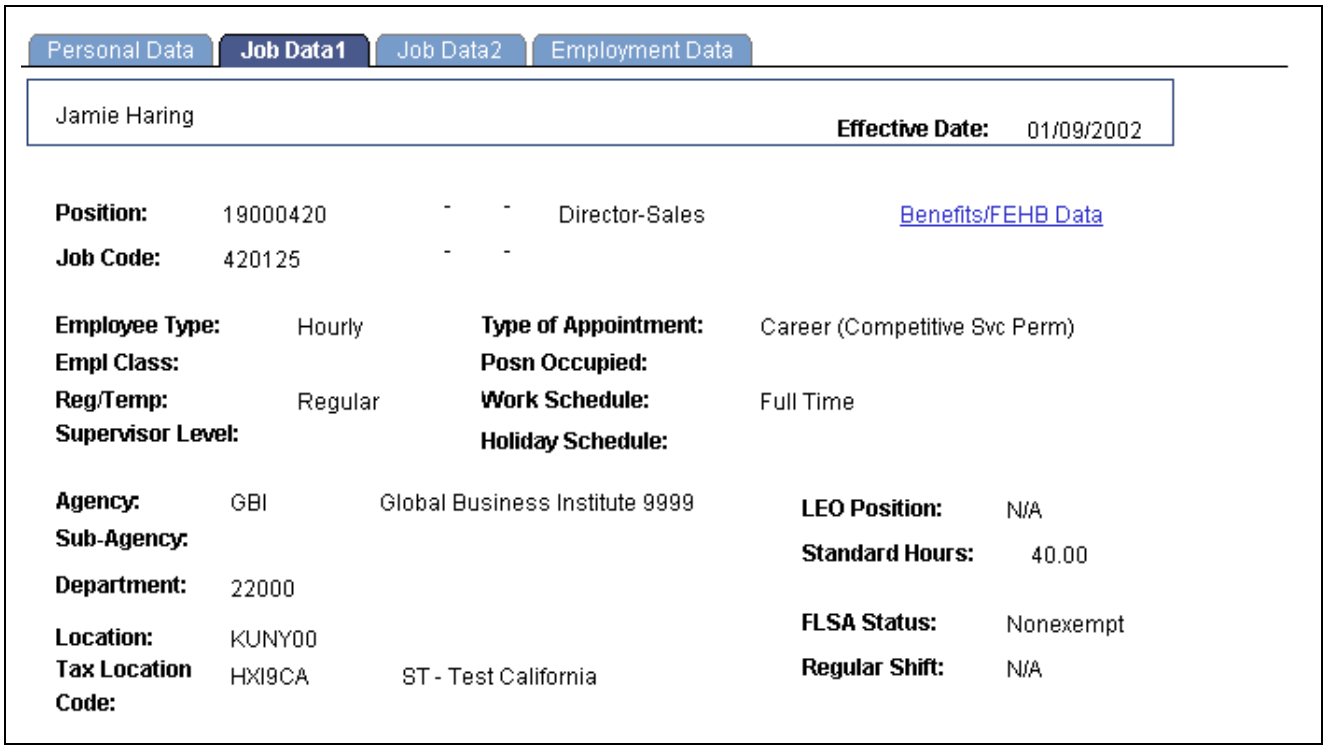
Personal Data page

The Personal Data page displays information on employee hire date, birth date, home address, marital status, birth information, citizenship, draft status, Medicare entitlement, race, and handicaps. Click the Mailing Address link to view the employee's mailing address. Click the Veterans Info link to view veteran's information for this employee.

Viewing Employee Job Data

Access the Job Data1 page.

Copyright © 1988-2006, Oracle. All rights reserved.



Personal Data - Job Data1 page

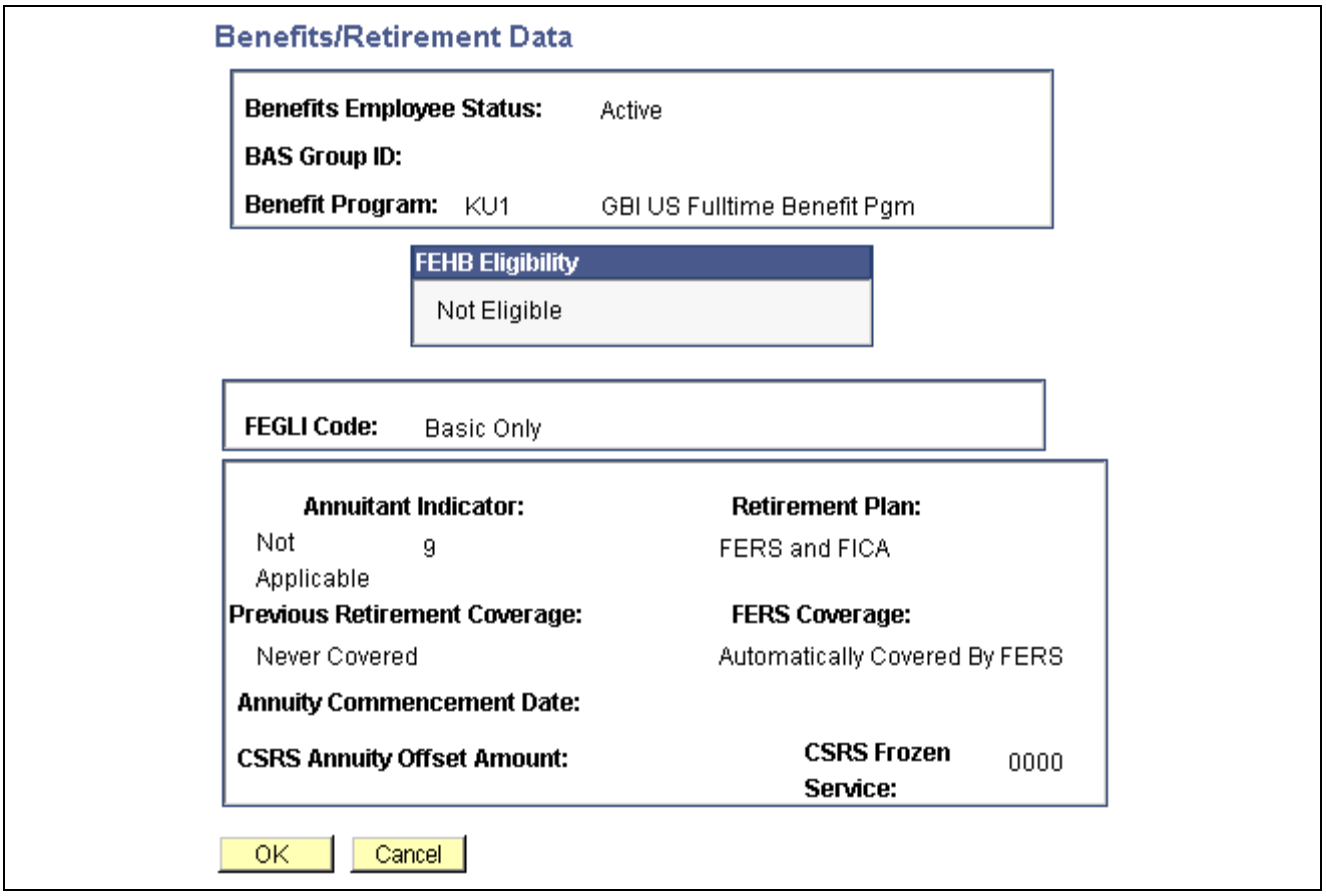
This page displays the employee's position number, job code, employee type, class, type of appointment, position occupied, work schedule, agency, subagency, department, location, tax location, LEO position, FLSA status, and other job-related information.

Click the Benefits/FEHB Data link to view information on this employee's benefits and retirement data.

Viewing Employee Benefit Programs

Access the Benefits/Retirement Data page.

Copyright © 1988-2006, Oracle. All rights reserved.



Personal Data - Job Data1: Benefits/Retirement Data page

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Benefits, "Setting Up Base Benefits Core Tables"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Benefits, "Enrolling Participants"

Viewing Other Summary Pages in PeopleSoft Enterprise Human Resources

Several other display-only pages summarizing employee data are available for you to review in PeopleSoft Enterprise Human Resources. Most of them derive information that you enter in other PeopleSoft Enterprise Human Resources business processes, such as Planning Compensation, Track Global Assignments, and Administering Training. However, you'll also find them useful for planning and analysis when you work in the Workforce Administration menu.

Following are some of the summary pages:

- Employee Data Summary: Displays information on employee current status, hire date, birth date, marital status, standard work hours, pay group, job code, and other job- and compensation-related information. Benefits, Employee/Dependant Information, Review HR/Job/Payroll Data.

Copyright © 1988-2006, Oracle. All rights reserved.

- Organizational Summary: Displays a summary of all the organizational relationships for a person. Workforce Administration, Personal Information, Person Organizational Summary.
- Career Assignment Summary: Displays the actual job path the employee has followed in the organization. By tracking employee movements through salary structures and manager levels, you'll get a feel for where the employee has been in your organization so far. Workforce Development, Career Planning, Review Career Summaries, Career Assignments.
- Compensation History: Displays the history of all pay rate changes the employee has received, which is particularly useful when you are planning new increases. Compensation, Base Compensation, Review Salary Information, Employee Compensation History. The Compensation History page is also in Workforce Development, Career Planning, Review Career Summaries.
- Immediate Family Summary: Lists all dependents that are a part of the employee's immediate family. Immediate family is defined as dependents that are the employee's spouse, son, or daughter. You'll find this page helpful for determining eligibility for various types of benefits your organization offers to employees, their spouses, and children. Benefits, Employee/Dependant Information, Review Dep/Ben Summary.
- Training Summary: Displays student training history, which is helpful when determining whether students are receiving adequate training to perform their current jobs, to see if they've taken all course prerequisites, and for career and succession planning. Enterprise Learning, Result Tracking, Review Training Summary.
- Injury Summary: Provides an overview of the health and safety incidents in which this individual has been involved, including injuries and illnesses and the nature of the incidents. Workforce Monitoring, Health and Safety, Obtain Incident Information, Review Employee Injury Summary.

Copyright © 1988-2006, Oracle. All rights reserved.

CHAPTER 17

(USF) Administering Personnel Action Requests

This chapter provides an overview of administering personnel action requests (PAR) and discusses how to:

- Track and route a personnel action request (PAR) through reviews and completion.
- Initiate and request personnel actions.
- Authorize and approve personnel actions.
- Process human resources personnel actions.
- Cancel or correct a personnel action request.
- Print Request for Personnel Action (SF-52) and Notice of Personnel Action (SF-50) reports.
- View summary pages.
- Generate a Personnel Actions History report.
- Generate a Wage and Separation report.

Understanding the Administering PAR System

The administering PAR system provides you with the power to process action requests quickly and easily. The system automatically routes a wide variety of requests directly to reviewing officials, and on to human resources, in the path your agency designates.

If anyone needs further information, the system automatically routes that inquiry back to the originator. All involved are included in the communication loop and always know that their requests are moving through a well-mapped review, authorization, and approval cycle.

Note. Keep in mind that the description and samples described throughout this book are illustrative, flexible models that you can adapt for your agency's personnel administration system. Your agency can set up the Administer Workforce system routing, security, accessing, processing, and many other features to meet your individual agency needs and requirements.

Using a streamlined menu structure, you can navigate quickly and easily through the whole process. Using PeopleSoft workflow, you indicate the level of authorization and the system routes the request through the process for you.

Significant features of the PAR system include:

- Flexible work-in-progress processing.
- Cancellation and correction functionality.
- Reviewed flag processing for retroactive personnel actions.

Copyright © 1988-2006, Oracle. All rights reserved.

- Enhanced navigation with pages.
- Issuing awards and bonuses.
- Detail assignment processing.
- Support for the personnel office identifier (POI) signature requirement.

Common Elements Used in This Chapter

PAR Status

The PAR status code automatically defaults to *Requested* for new actions. Leave this as a work-in-progress request with that status until you have complete data. After you have completed all the necessary information, keep the PAR status as *Requested* to send it on to human resources officials for approval and processing.

If you aren't ready to submit the request, change the status to *Initiated,* and keep working on it until you're done. Change the status to *Requested* to submit it.

After completing the HR Request pages and reviewing the data, assign a status of *Processed by HR* to approve and finalize this request.

Once you assign the status of *Processed by HR,* the request becomes an actual event and is posted in the system to interface with PeopleSoft Enterprise Payroll, Manage Base Benefits, or other related areas.

If the request is invalid or needs further information, assign a status of *Disapproved* or *Return to Sender.*

Prerequisites

Begin every personnel action request on the Data Control page. The first time you open the page, the most recent personnel action request appears automatically. Before creating a new request, you must insert a new row for all actions or changes.

In order to save time, the system assumes you want to continue viewing and updating information on the same employee, so when you move to a new page in the component, information for that same employee appears automatically.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "(USF) Setting Up Human Resources Management Tables"

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "(USF) Setting Up the Work-in-Progress Management System"

Chapter 7, "(USF) Adding an Employment Instance," Entering Information for the Employment Instance, page 245

 Copyright © 1988-2006, Oracle. All rights reserved.

Understanding Workflow

Many of the tasks you perform throughout the day are part of larger tasks that involve multiple steps and several people in your organization working together. PeopleSoft workflow tools help you build the larger process into your PeopleSoft Enterprise Human Resources system, automating vital business tasks. You can tie together the individual steps so that PeopleSoft can help coordinate the activities. Because the system has the big picture and knows what you are trying to accomplish, it can automatically start the next step in the workflow, following your organization's business rules.

Using workflow capabilities for administering personnel actions, the PAR status indicates the steps in routing and provides employees, supervisors, and human resources professionals easy access, surveillance, and security in the request management process. Workflow routes requests by sending personnel actions through a cycle to initiate, request, authorize, and approve requests, and provides options along the way for more time, further information, or returning to sender. Workflow then sends requests on to human resources for final processing. The automated workflow process ensures that the action request goes through all the reviews your agency needs until it becomes an actual event.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Delivered Workflows for PeopleSoft HRMS"

Tracking and Routing a PAR Through Reviews and Completion

The Employee Request, Supervisor Request, and HR Request components are identical. The only difference is in the type of data that is accessible to each group, according to security options and allowable actions.

Note. The information you need to track and route a PAR is the same type of information you enter to hire employees. Use the same pages for both.

Your agency determines the actions and data available to employees, supervisors, and human resources officials. Actions may include creating requests, issuing approvals and authorizations, and finalizing actions. Actions also include returning an action to the originator; asking for more information; or withdrawing, canceling, or correcting an action. Decisions on these issues are implemented using the Approval Flow component (GVT_WIP_ACTIVITY).

Employees may request only their allowable actions; therefore, a user sees only certain options, such as Family/Benefits Change or Retirement. Supervisors may request, approve, and authorize those and other specific actions. When a supervisor opens the pages, their list reflects whatever your agency designates, such as promotion, demotion, detail assignment, reassignment, bonuses and awards, and others. They may also return an action to the originator for more information, or disapprove a request and render it inactive.

Human resources officials have the authority to initiate, approve, and finalize all possible actions. Therefore, human resources officials, along with hiring, tenure changes, and other actions that an employee or supervisor wouldn't usually initiate, can access *all* of the personnel actions in any phase of the cycle. For *finalized* actions that have already completed the processing cycle, human resources has the exclusive right to cancel and correct.

The PAR processes provide both flexibility and modification capacity. You can process new personnel actions that are effective-dated prior to existing personnel actions and define the codes for requests in a truly user-defined environment.

Copyright © 1988-2006, Oracle. All rights reserved.

See Also

Chapter 7, "(USF) Adding an Employment Instance," Adding an Employment Instance, page 239

Adding and Updating Data

For U.S. Federal Government customers, to add, update, or change any employee data, you create a PAR. To submit and route and track a PAR automatically through the approval process, assign a PAR work-in-progress status code that indicates its position in the request cycle and determines where to send it.

Automatically Routing the PAR

By changing the request status and saving the page, reviewers acknowledge receipt and approval, and send a PAR forward through workflow. Each review level serves as verification that the information is complete and that the necessary documents are attached. The reviewers may also enter their own comments. Your agency can set up and route request cycles for each type of request from creation through various reviews, including as many or few reviews as desired, and on to final Human Resources completion.

Selecting a PAR Status

If you want to open a request, fill in partial data and then complete it later, open a request and assign a PAR status of *Initiated.* While you gather additional information, the request stays within your own domain and control. You can revisit it as often as needed until you are ready to submit it for review.

When your request data is complete and you want to proceed with the automatic routing review cycle, submit the request by assigning a PAR status of *Requested.* By doing so, you make the request official. Once the originator submits a *Requested* action, workflow retrieves it and automatically routes it to others who are involved in the processing, and the authorizing and approving officials review its merits. It may go through a review cycle that includes *1st Authorized* and *2nd Authorized* by specific supervisors and managers, *Approved/Signed* by second-level managers, and finally to the status of *Processed* (processed by HR), according to your agency's requirements.

If clarification or additional information is needed, a reviewer can choose the status of *Returned for More Information.* Returning it to the originator restarts the process. A reviewer can also disapprove a request by assigning the *Disapproved* status, which stops the process altogether. During the review cycle, the originator can also withdraw a request while it is still in a work-in-progress state.

Only the originator can cancel or change and resubmit a request that is in progress. Because other supervisors, managers, and human resources officials don't have the ability to change request data, if a request needs to be *Canceled,* you must return it to the originator.

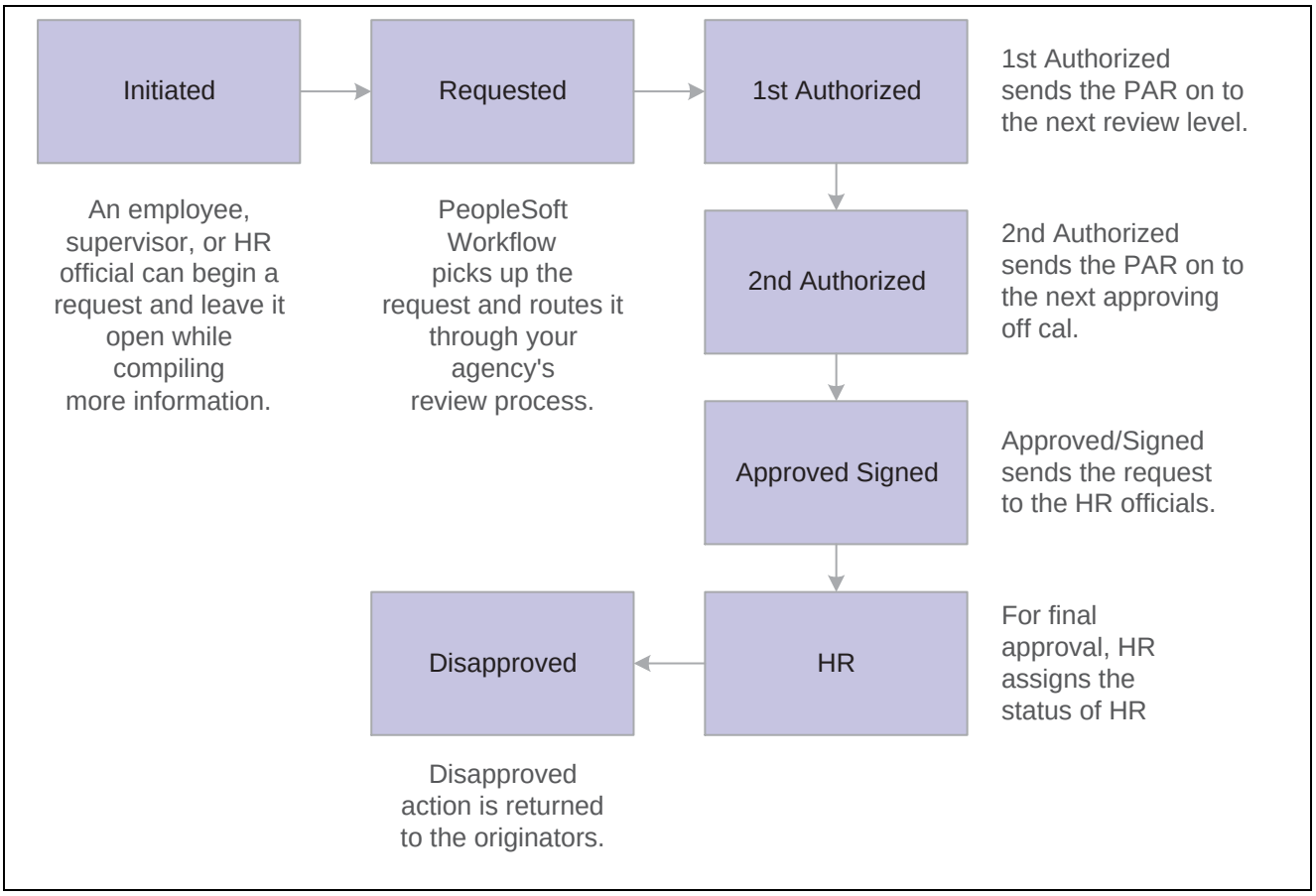
When a user chooses a work-in-progress status and assigns a PAR status code, this code indicates the request's status and position and enables workflow to route and monitor it through the approval cycle.

We provide a general example of the review cycle, though your agency can set it up differently if necessary.

An Overview of PAR

This illustration shows an overview of a sample process:

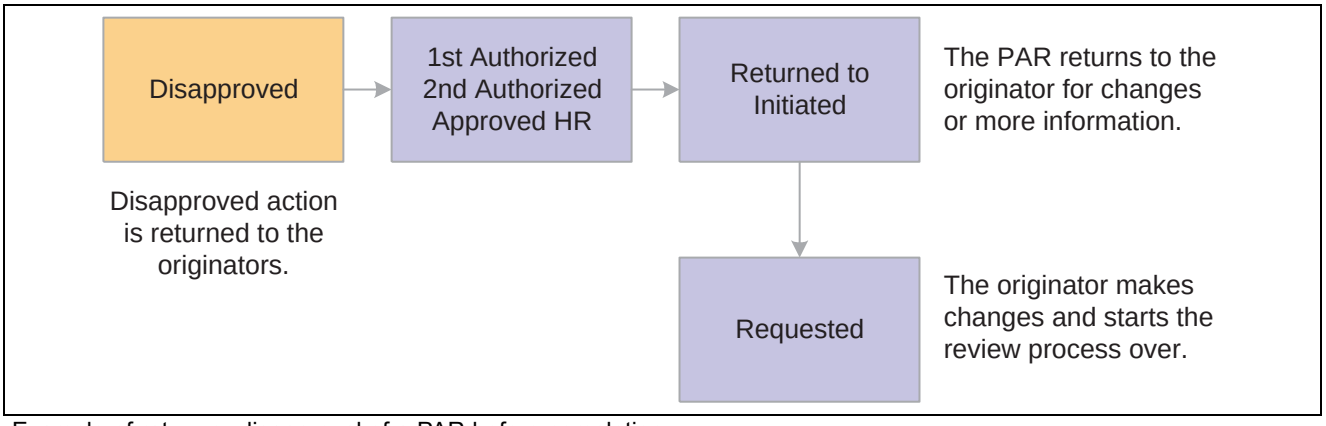
 Copyright © 1988-2006, Oracle. All rights reserved.



An example of the process of approving a PAR

Disapproving or Returning a Request

This illustration shows an overview of a sample process disapproving or returning a request:



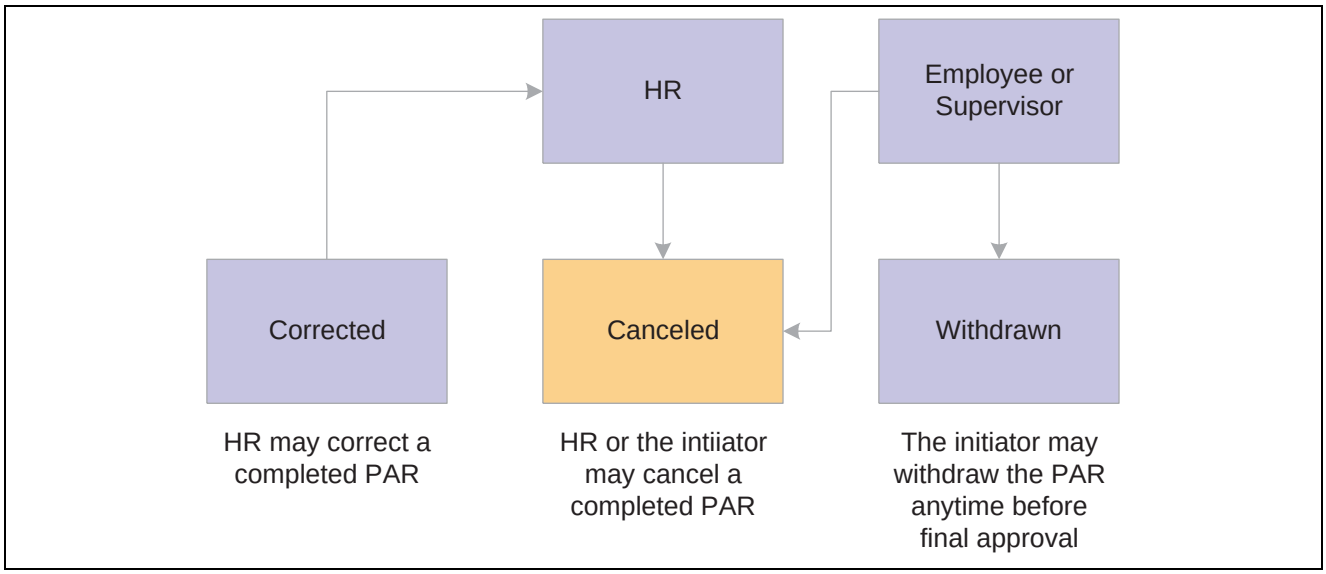
Example of return or disapproval of a PAR before completion

Note. Although a status of Returned/Disapproved is delivered, workflow isn't part of this feature.

Cancellation, Correction, or Withdrawal of a Request

This illustration shows an overview of a sample process canceling, correcting, or withdrawing a request:

Copyright © 1988-2006, Oracle. All rights reserved.



Example of cancellation, correction, or withdrawal of a PAR

Identifying PAR Status Codes

Following are definitions for each work-in-progress status and PAR status code that are set up in the sample data delivered with your system:

Work-In- Progress Status	PAR Status Code	Definition
Initiated	INI	Indicates an action is open, but not yet submitted as a request. For various reasons, originators may begin a request and then find they need additional time or data before completing their work on that action. By assigning a status of *Initiated,* originators can leave the request open until it is ready to submit. Supervisors may need extra time to develop supporting documentation, such as job codes, and can assign a status of *Initiated* to designate that their work is in progress.
Requested	REQ	To submit a request, assign a status of *Requested.* Most requests then go automatically to the first-level supervisor for approval. An exception is the request for family/benefits change; you may want to set the system up to send this type directly to a human resources (HR) official to be processed. Or when a request originates in the HR department, it may go directly to an HR official to be processed.
1st Authorized	1st	The first-level reviewer assigns a status of *1st Authorized* to send a request forward to the next review level.
2nd Authorized	2nd	A first-level reviewer sends a request forward to the next review level by assigning a status of *2nd Authorized.*

Copyright © 1988-2006, Oracle. All rights reserved.

Work-In- Progress Status	PAR Status Code	Definition
Approved/Signed	SIG	A second-level reviewer sends a request forward to an HR official to be processed by assigning a status of *Approved/Signed.*
Processed By Human Resources	PRO	Only human resources officials can assign the status of *Processed By Human Resources*. They first review and complete the request and may add the appropriate nature-of-action code, legal authorities, and remarks. They indicate final approval by assigning the status of PRO. The request then becomes an actual event. A status of PRO is final and can't be changed by anyone. Once a request becomes an actual event, it is then available for further consideration and processing by payroll, benefits, interface reports, and other areas.
Return for More Information	RET	Anywhere in the process, a reviewer can request more information or clarification by assigning a status of *Returned for More Information* and can include a comment such as, "I need further information." The request goes back to the originator. When originators get the returned request, they add the information, reassign a status of *Requested,* and the process begins again.
Withdrawn	WTH	The original creators of the request may withdraw a request if it is sent back to them for any reason. Human resources may withdraw a request when it is proven invalid or for some reason no longer is needed. Note that a request cannot be withdrawn after it has been either processed or disapproved.
Disapproved	DIS	At any point in the process, a reviewer can disapprove a request by assigning a status of *Disapproved* and entering the reason in the Comments field. This causes the request to be sent back to the originator either for cancellation or for the originator to change and resubmit it.
Corrected	COR	Only a human resources official has the authority to perform a correction after a request has completed the approval cycle and been finalized.
Canceled	CAN	A human resources official has the authority to perform a cancellation after a request has completed the approval cycle and been finalized. The *Canceled* status removes the request from the active request system, leaving only the tracking record history. Or if the originator receives a returned request, the originator may assign a status of *Canceled.*

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Delivered Workflows for PeopleSoft HRMS"

Copyright © 1988-2006, Oracle. All rights reserved.

Processing of PAR Actions

The PeopleSoft Enterprise Human Resources USF functionality has separate tables for managing PAR, and these tables hold data until each action has been approved and completed by human resources. Any records held in the separate tables haven't completed the PAR process and don't exist to the rest of the system. After completion, the data is automatically updated to system tables to enable other processes, such as those in PeopleSoft Enterprise Payroll, Benefits Administration, and Time and Labor.

To support the PAR processing concept, all of these records have been effective-dated and have been tied together with common keys. Because the three records (GVT_JOB, GVT_PERS_DATA, and GVT_EMPLOYMENT) work as one, a row is inserted into all three records when a user inserts a row on the Data Control page.

Once a PAR has successfully worked its way through the approval process, is processed by human resources as completed, and has become an actual event, it is ready to be copied into the three counterpart records (JOB, PERS_DATA_EFFDT, and EMPLOYMENT). The process is accomplished instantly, and the user is unaware of the updates to the other tables.

However, if the PAR action has an effective date that is later then the system date, only JOB is updated when the action is saved. PERSONAL_DATA and EMPLOYMENT are updated only when the date of the action is equal to the system date. This is because the counterpart to GVT_JOB, which is JOB, is effective-dated. Therefore, it receives the future effective-dated action and ignores it until that date.

Initiating and Requesting Personnel Actions

Most of the various PARs are created in a similar way. A good representative example is a family/benefits change request, which is reviewed in this chapter. Other chapters of this book cover other examples of the most highly used requests, such as hiring, awards and bonuses, leave with or without pay, data changes, and termination.

The only significant differences between submitting the various requests are the action and reason codes that you assign and the data that is entered. Most of the requests involve similar steps: You begin on the Data Control page, insert a new row and indicate the desired action, and then tab to another data page in the same group to enter further information, if necessary.

For example, when you initiate a request for changing benefit choices, enter data on the Data Control page and then move to the Personal Data page. For some requests, such as a leave without pay action, however, you enter data *only* on the Data Control page.

You can always view data on other pages, and view summary pages, for decision-support purposes.

See Also

Chapter 7, "(USF) Adding an Employment Instance," Adding an Employment Instance, page 239

Chapter 18, "(USF) Processing Personnel Action Requests," page 621

Authorizing and Approving Personnel Actions

Once a request has been submitted, the PeopleSoft workflow system automatically routes the request to designated supervisors and managers for authorizations and approvals.

 Copyright © 1988-2006, Oracle. All rights reserved.

Supervisors and human resources officials can approve and authorize requests that cover many possible actions involving hire, return to duty, leave with or without pay, suspension, promotion, bonus, award, change in pay, and others. They can also return a request and ask for more data or disapprove it so that it is returned to the originator and its cycle ended.

If you are a designated reviewer, you see the request item in your worklist if you are using the PeopleSoft Navigator display. To authorize or approve a request, click Work It!, and the system automatically transfers you to the 1st Rqst Authorization, 2nd Rqst Authorization, or Approve Request component. You can also access the request from the Workforce Administration, Job Information menu.

You see the same page on which the initiator entered data, beginning with the Data Control page. However, the information you see is display only and unavailable for entry. Review the data on the Data Control page, including the PAR Remarks and Tracking Data, as well as data on any other page that is relevant to the request. To approve the request, change the PAR Status code on the Data Control page to the appropriate choice, such as *1st Authorized, 2nd Authorized,* or *Approved/Signed.* The request is then routed to human resources officials for completion and processing.

If you need more information or want to disapprove the request, change the PAR Status code to *Return for More Information* or *Disapproved.*

The authorization process works exactly the same way regardless of what the request is, such as data change, award, bonus, or recruitment. Once the authorizing officials have completed their work and entered a new PAR status code, the request goes automatically to the next level in the process.

Processing Human Resources Personnel Actions

Once a Personnel Action request (PAR) has been through the initiation and request process and has passed the authorization and approval processes, it goes to the human resources office for final processing. A human resources official can submit human resources-specific actions and review and finalize personnel actions that have already been requested, authorized, approved, and are ready to become actual events.

The HR Processing pages are reserved specifically for the human resources officials and as a result contain overviews, controls, and additional navigational capacity. The HR Processing pages enable you to *access* personnel actions, *view* data, *finalize* actions, and *print* reports.

The HR Processing (USF) component is similar to the Supervisor Request, 1st Rqst Authorization, and 2nd Rqst Authorization components, however the HR Processing (USF) component contains additional PAR Status options.

Canceling or Correcting a Personnel Action Request

Once a request has the PAR status *Processed by HR,* it remains as a record in the system. However, it is possible to correct or cancel it by, essentially, creating a new action that references the initial request and gives it a new status. Only human resources officials may perform a correction or cancellation.

Only processed rows are available for correction or cancellation. If an employee has an unprocessed transaction, you will be unable to correct or cancel a previous transaction until all of the employee's unprocessed rows have been successfully processed.

To access a processed request that you want to correct:

Copyright © 1988-2006, Oracle. All rights reserved.

1. Open a new request in the Data Control page of the Correct Personnel Action USF component.
2. Click the Insert Row button to insert a new row, and enter the correct data.

   The system automatically enters a PAR Status of *COR*.
3. If you insert a row and a more current transaction exists, the Reviewed check box is displayed and is highlighted in blue. This check box serves to alert you to review the additional transaction for errors and to select the check box after you review or change it. An error message is displayed if you try to save the page without first selecting the Reviewed check box.

   Note. The Reviewed check box is also displayed on the Data Control page of the HR Processing USF component.

Note. Be careful when updating data using correction mode, particularly on processed personnel actions. Federal business process specifies that if corrections are made to existing data rows, a Correction SF50 is required. In this case, do not use HR Processing USF component, but rather the Correct Personnel Action USF component.

To access a processed request that you want to cancel:

1. Open a new request in the Data Control page of the Cancel Personnel Action USF component.
2. Click the Insert Row button or press F7 to insert a new row.

   The system automatically enters a PAR Status of *CAN*.

See Also

Chapter 7, "(USF) Adding an Employment Instance," Adding an Employment Instance, page 239

Printing Request for Personnel Action (SF-52) and Notice of Personnel Action (SF-50) Reports

Employees and supervisors can print an action request (SF-52) anytime. Human resources officials can also review a personnel action request report (SF-50) that summarizes various aspects of employee and job request data in printed form.

This section discusses how to:

- Print an action request (SF-52).
- Run the Personnel Action Report.

 Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Print a Request for Personnel Action /Notice of Personnel Action

Page Name	Object Name	Navigation	Usage
Data Control	GVT_JOB0	• Workforce Administration, Job Information, Add Employment Instance USF, enter a Person ID and click the Add the Relationship link, Data Control • Workforce Administration, Job Information, Employee Request USF, Data Control • Workforce Administration, Job Information, Supervisor Request USF, Data Control • Workforce Administration, Job Information, HR Processing USF, Data Control • Workforce Administration, Job Information, Correct Personnel Action USF, Data Control • Workforce Administration, Job Information, Cancel Personnel Action USF, Data Control	Print an action request (SF-52).
Parameters , Request Personnel Action USF - Parameters	RUNCTL_PAR	• Workforce Administration, Job Information, Reports, Notice of Personnel Action USF, Parameters • Workforce Administration, Job Information, Reports, Request Personnel Action USF, Parameters	Print the official Notification of Personnel Action form used to notify employee and payroll office of the action, record the action in the Official Personnel Folder, and provide a chronological record of actions that have occurred.
Select Data , Request Personnel Action USF - Select Data	RUNCTL_PAR2	• Workforce Administration, Job Information, Reports, Notice of Personnel Action USF, Select Data • Workforce Administration, Job Information, Reports, Request Personnel Action USF, Select Data	After filtering the data with the parameters defined on the Parameters page, use the Select Data page to select employee data for printing PARs.

Copyright © 1988-2006, Oracle. All rights reserved.

Printing an Action Request (SF-52)

Access the Data Control page.

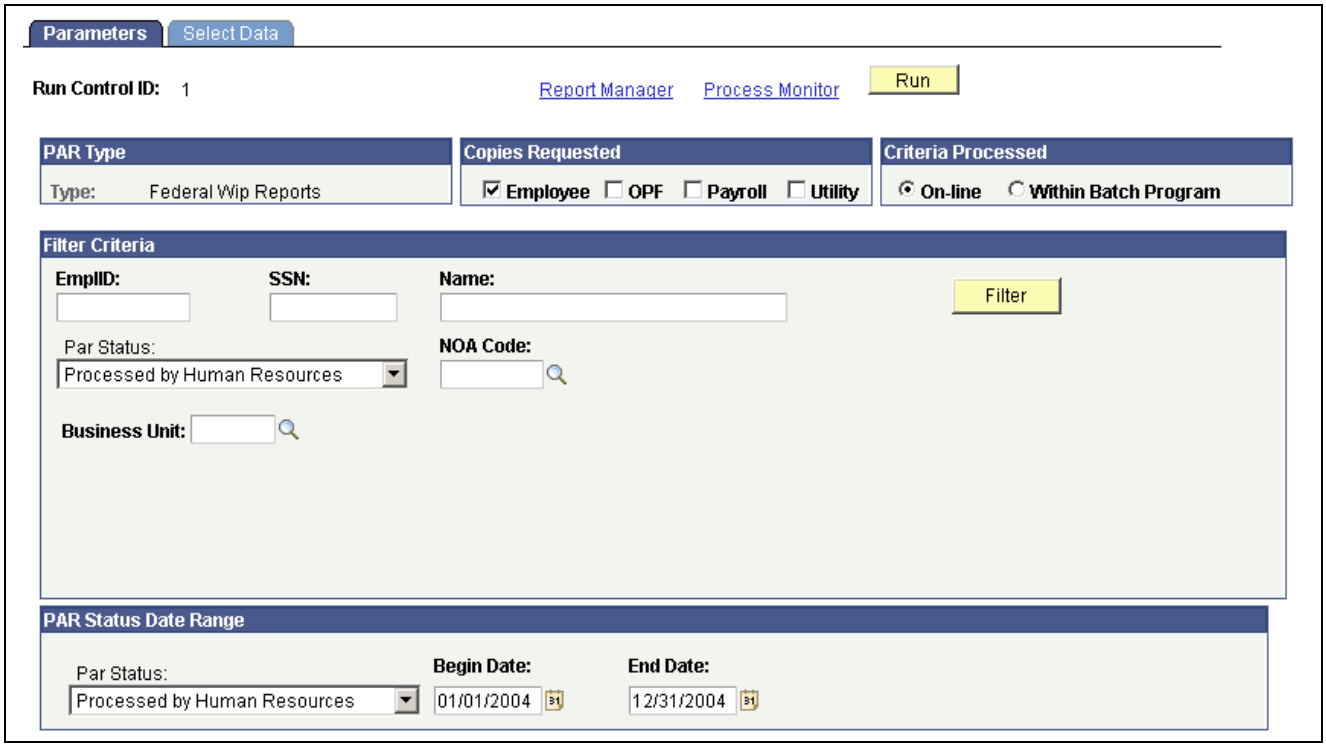
To produce a printed Request for Personnel Action form (SF-52), click the Print SF-52 button. The system asks whether to print the SF-52 to the Web or to a file. If you choose File, you must specify the file location.

Before saving and printing this request, ensure that the employee ID is the one you want to appear on the form. An assistant processing an action on an authorized official's behalf, who wants that official's information to appear on the SF-52 and become part of the official audit trail for this action, should select the Override Opr EmplID check box and enter the employee ID and employee record number of the official for the action on the Job Tracking Info page.

If you want to print to a file, specify the name of the output file (including the drive and directory names). Once you enter these parameters, the system runs a Structured Query Report (SQR) to create the SF-52 for you. You can print an SF-50 only when the action has a status of *Processed by HR*.

Running the Personnel Action Report

Access the Notice of Personnel Action USF - Parameters page or Request Personnel Action USF - Parameters page.



Parameters page

PAR Type (personnel action request) — This field is available for entry only if you selected the Request for Personnel Action menu item. Select the type of PAR that you want to print.

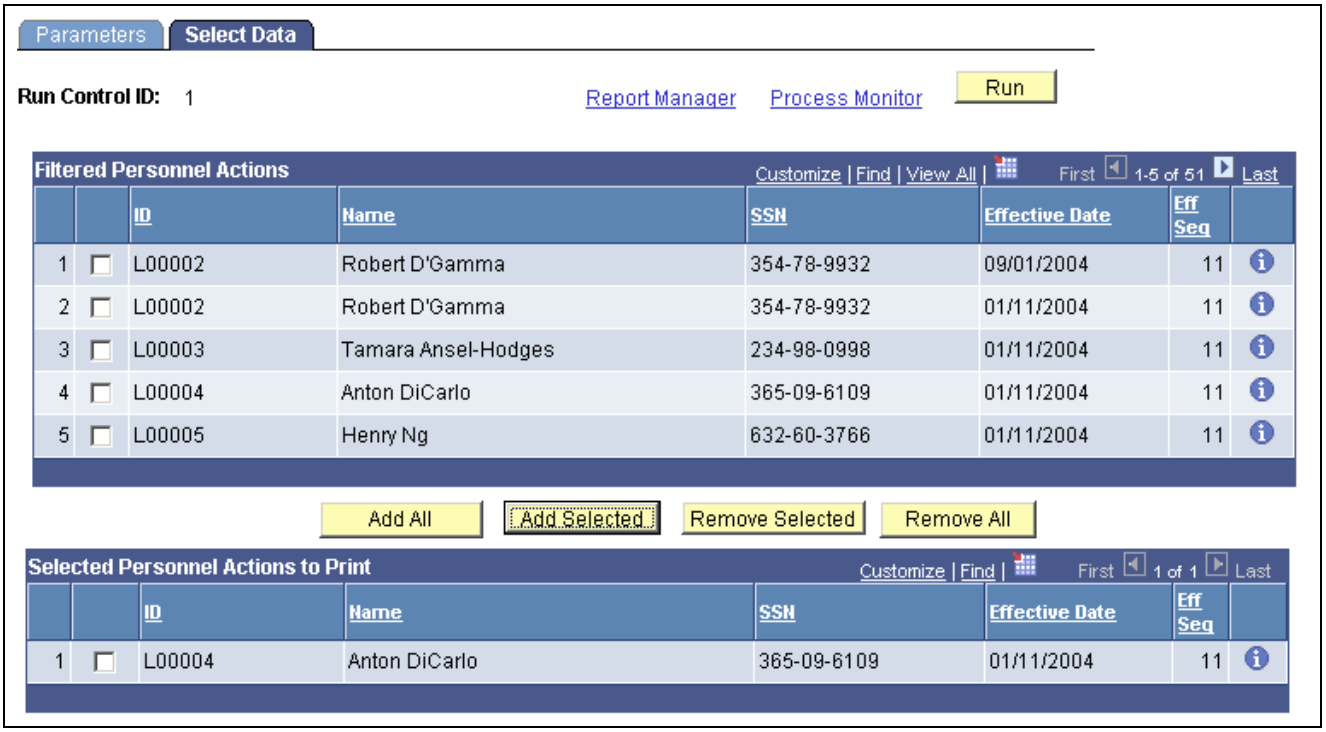
Copies Requested — This group box is available for entry only if you selected the Notification of Personnel Action menu item. Select the copies that you want to print. Available values are Employee, OPF, Payroll, and Utility.

On-line — Select if you want to immediately print the PARs you select.

Copyright © 1988-2006, Oracle. All rights reserved.

Within Batch Program	Select if you want to save your filtering criteria for later processing.
EmplID (employee ID), **SSN** (social security number), **Name, PAR Status, NOA Code** (nature of action), and **Business Unit**	Filter actions by employee ID, employee social security number, PAR status, NOA code, or business unit.
PAR Status	To filter by PAR status, select a status. The Begin Date and End Date fields become available when you select a PAR status.
Filter	When you click this button, the system selects the records that match your filter criteria and displays them on the Select Data page.

Access the Notice of Personnel Action USF - Select Data page or Request Personnel Action USF - Select Data page.



Select Data page

The system displays information about the PARs that it filtered based on the parameters you specified on the Parameters page. Use the check box at the beginning of each data row to select individual PARs and add them to the list in the Selected Personnel Actions to Print group box when you click the Add Selected button. Click the Add All button to add all of the PARs to the list without selecting any check boxes. These PARs print when you run the report.

If you want to remove any of the PARs in the Selected Personnel Actions to Print group box, select the check box at the beginning of each data row and click the Remove Selected button. Click the Remove All button to remove all PARs without selecting the check box on any row.

	Click this button to view the values of all of the filter criteria for this PAR.
Add All	Click this button to add all PARs that are in the Filtered Personnel Actions group box to the Selected Personnel Actions to Print group box.

Copyright © 1988-2006, Oracle. All rights reserved.

Add Selected	Click this button to add the selected PARs from the Filtered Personnel Actions group box to the Selected Personnel Actions to Print group box.
Remove Selected	Click this button to remove selected PARs from the Selected Personnel Actions to Print group box.
Remove All	Click this button to remove all PARs from the Selected Personnel Actions to Print group box.

Viewing Summary Pages

To view a summary of employee data, use the dynamic inquiry pages and display-only pages that summarize data entered in other pages throughout the system, including Job Summary, Personal Data, Job Data 1 and 2, and Employment Data pages.

See Also

Chapter 16, "Viewing Summary Workforce Information," page 589

Generating a Personnel Action History Report

This section discusses how to generate the Personnel Actions History report.

The Personnel Actions History report (FGHR017) lists all employees affected by each of the job actions you enter on the Run Control page. It prints the following information:

- Employee name.
- Department.
- Effective date.
- Reason for the action.

For each employee the report lists:

- Original hire date.
- Total years of service.
- Employee type.
- Regular/temporary.
- Full/part-time.
- Job code and title.
- Salary grade.
- Compensation rate associated with the action.
- Supervisor's name.

 Copyright © 1988-2006, Oracle. All rights reserved.

Page Used to Run the Personnel Actions History Report

Page Name	Object Name	Navigation	Usage
Action History Report	RUNCTL_FGHR017	Workforce Administration, Job Information, Reports, Personnel Actions History USF	Run the Personnel Actions History report (FGHR017).

Generating a Wage and Separation Report

Periodically, Federal agencies are required to generate a Form ES-931 report (Request for Wage and Separation Information). State agencies use the information in this report to determine benefit eligibility for each claimant filing claims for Unemployment Compensation for Federal Employees (UCFE).

The generation of the ES-931 report is a two-part process.

1. Use the Setup Wage/Separation USF component to enter setup information.
2. Use the Print Wage/Separation USF component to generate the actual report.

This section discusses how to:

- Enter ES-931 employee identification information.
- Enter ES-931 annual leave information.
- Enter ES-931 severance pay information.
- Generate the ES-931 report.

Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Set Up and Run the ES-931 Wage and Separation Report

Page Name	Object Name	Navigation	Usage
Setup Wage/Separation USF - Identification	GVT_UCFE_PG	Workforce Administration, Job Information, Reports, Setup Wage/Separation USF, Identification	Enter ES-931 identification information for the wage and separation report. **Note.** The pages in the Setup Wage/Separation USF component pre-populate the fields for which data is already available and those pre-populated fields are inaccessible. Enter data for the remaining fields since data is required in all of the fields.
Setup Wage/Separation USF - Annual Leave	GVT_UCFE_PAY_PG	Workforce Administration, Job Information, Reports, Setup Wage/Separation USF, Annual Leave	Enter ES-931 annual leave information for the wage and separation report.
Setup Wage/Separation USF - Severance Pay	GVT_UCFE_SEV_PG	Workforce Administration, Job Information, Reports, Setup Wage/Separation USF, Severance Pay	Enter ES-931 severance pay information for the wage and separation report.
Print ES-931	GVT_PRINT_ES931	Workforce Administration, Job Information, Reports, Print Wage/Separation USF, Identification, click the Print ES931 link, Print ES-931.	Run the Print Wage/Separation report (ES931).

Entering ES-931 Employee Identification Information

Access the Setup Wage/Separation USF - Identification page.

Copyright © 1988-2006, Oracle. All rights reserved.



Setup Wage/Separation USF - Identification page

Request Date Enter the date the information was transmitted.

Local Office Enter the numerical ID of the requesting/record holding office.

Claim Date Enter the effective date of the claim.

Print ES931 Click to access the Print Wage and Separation component.

Does this person perform "Federal Civilian Service?" Select if the employee performs Federal Civilian Service.

If No If the employee does not perform Federal Civilian Service, enter an explanation.

Is payroll office address based on SF-8? Select if the payroll office is based on an SF-8.

If No, has claimant received an SF-8? Select if the payroll office is not based on an SF-8.

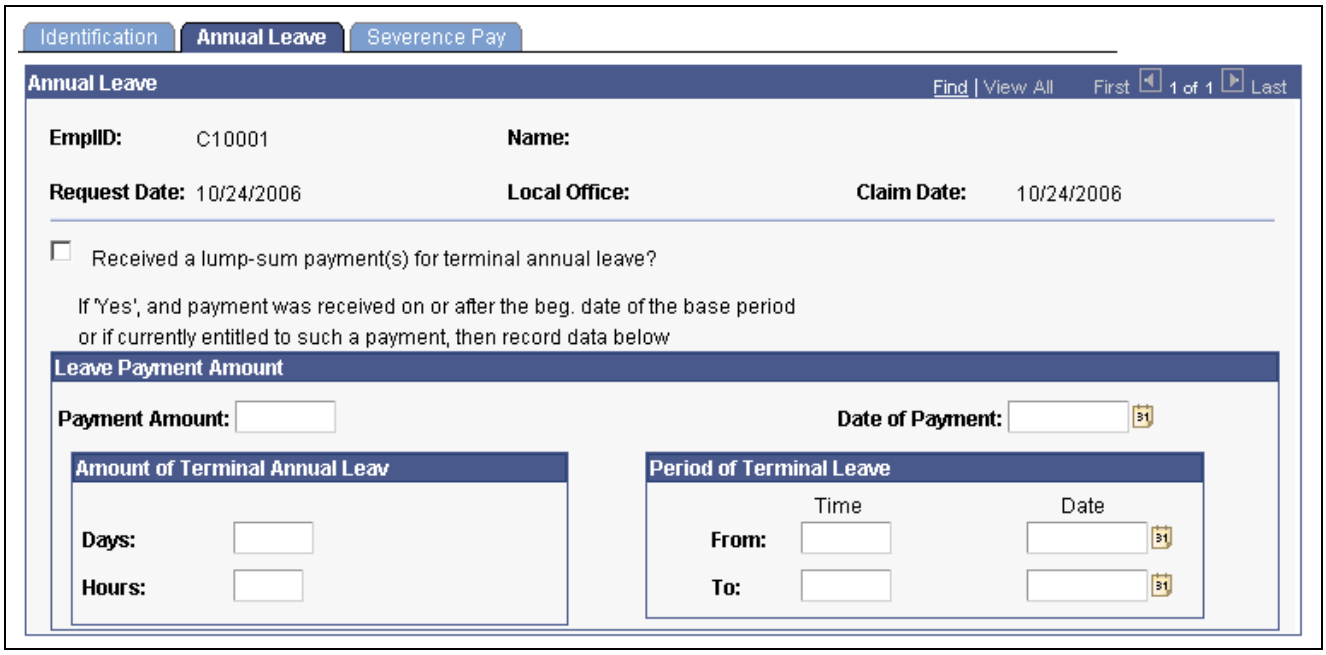
Defaulted Data

The information in this group box is pre-populated from existing data, if that data exists. If you need to change a value in a field that was pre-populated, you can click the Edit Information link to make the fields accessible for edit.

Entering ES-931 Annual Leave Information

Access the Setup Wage/Separation USF - Annual Leave page.

Copyright © 1988-2006, Oracle. All rights reserved.

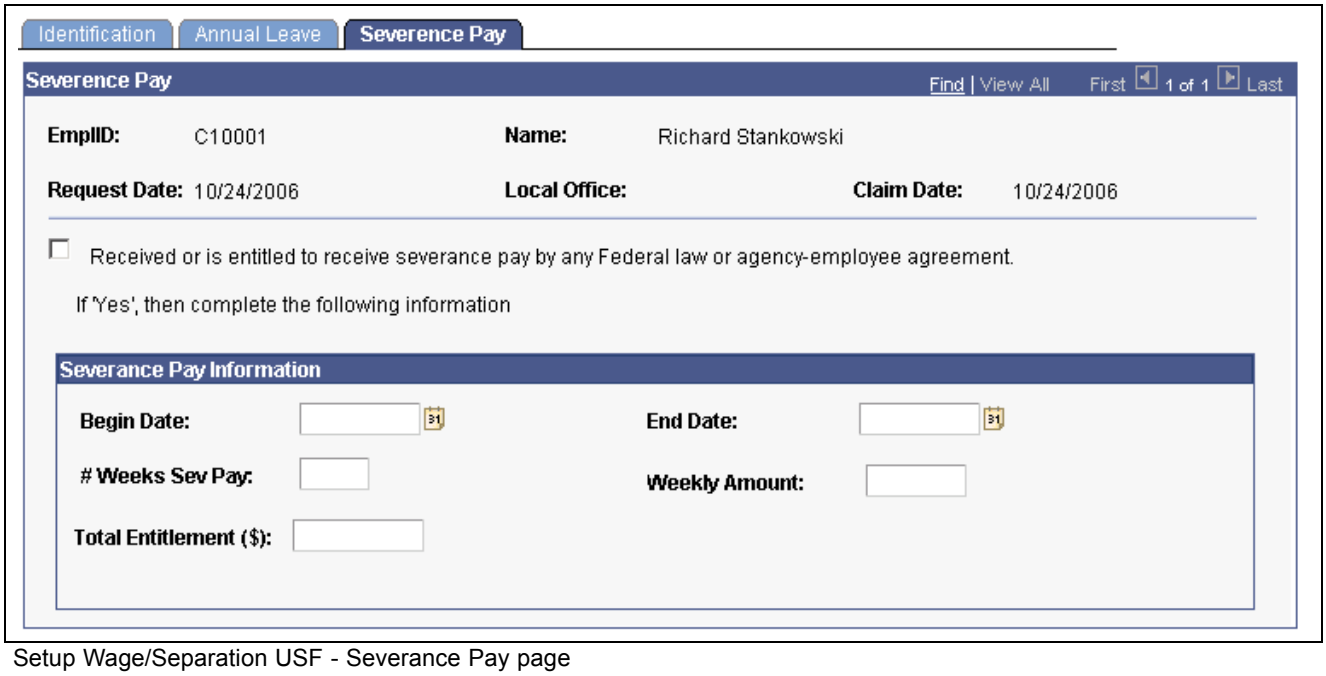


Setup Wage/Separation USF - Annual Leave page

If the employee received a lump-sum payment for terminal annual leave, select *Received a lump-sum payment(s) for terminal annual leave?*. If selected, and the payment was received on or after the beginning date of the base period, or if the employee is currently entitled to such a payment, enter the related data in the Leave Payment Amount group box.

Entering ES-931 Severance Pay Information

Access the Setup Wage/Separation USF - Severance Pay page.



Setup Wage/Separation USF - Severance Pay page

Copyright © 1988-2006, Oracle. All rights reserved.

If the employee has received or is entitled to receive severance pay, select *Received or is entitled to receive severance pay by any Federal law or agency-employee agreement.* If selected, enter the related data in the Severance Pay Information group box.

Generating the ES-931 Report

Access the Print ES-931 page.

Once you have completed the necessary setup, run the Print Wage and Separation report (ES931). This prints an ES-931 Request for Wage and Separation Information report.

Copyright © 1988-2006, Oracle. All rights reserved.

 Copyright © 1988-2006, Oracle. All rights reserved.

CHAPTER 18

(USF) Processing Personnel Action Requests

This chapter provides an overview of personnel action requests (PARs) and discusses how to perform common personnel actions.

Note. PeopleSoft delivers a database providing a sample setup of PAR data. All discussions, overviews, and examples in this book are based on the sample setup. Your agency may choose a similar setup or vary the processes to reflect its own system and operational procedures.

Understanding PARs

This section discusses:

- PARs.
- Sample setup of pages used by employees and supervisors.
- Personnel actions and employee status.
- The importance of effective dates.
- Multiple actions with the same effective date.

Personnel Action Requests

An employee's history with an agency usually involves many job changes, such as promotions, leaves of absence, layoffs, retirement, pay rate changes, awards, and so on. To maintain both current records and a complete history of employee job data, your employees, supervisors, and human resources officials will regularly submit PARs for these changes in PeopleSoft Enterprise Human Resources. (Before requesting personnel actions, verify that you've selected the Multiple Jobs Allowed check box on the Installation Table - Product Specific page.)

Note. The information you need to maintain your employees' career histories is the same type of information you enter to hire employees. Use the same pages for both.

Requests for updates you want to make to employee job data begin in the Workforce Administration, Job Information menu. Depending on whether you are an employee requesting a change for yourself, a supervisor requesting a change on behalf of someone in your department, or a human resources official, choose Employee Request USF, Supervisor Request USF, or HR Request USF, where the system prompts you for an employee ID. Go to the Data Control page to begin the request for a new action, and then go to other pages to enter additional information for the personnel action that you're requesting.

The differences between employee, supervisor, and human resources requests are the types of requests available and the workflow routing of the requests after being submitted. Human resources officials may request any of the actions.

Copyright © 1988-2006, Oracle. All rights reserved.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Installing PeopleSoft HRMS," Setting Up Implementation Defaults

Chapter 7, "(USF) Adding an Employment Instance," page 237

Sample Setup of Pages Used by Employees and Supervisors

The following table lists a sample setup of the pages employees and supervisors can use to enter requests and where those requests can be routed.

Request Type	Page	Submitted By	Routed To
Accounting information	Compensation	Supervisors	Authorization
Agency transfer	Job	Supervisors	Authorization
Agency/subagency	Job	Supervisors	Authorization
Appointment/expiration data	Employment 1	Supervisors	Authorization
Awards	Data Control	Supervisors	Authorization
Benefits/retirement	Job	Supervisors	Authorization
Department reassignment	Job	Supervisors	Authorization
Departmental hierarchy (view only)	Job	Supervisors	Authorization
Draft status	Personal Data	Employees/Supervisors	HR department
Earnings	Compensation	Supervisors	Authorization
Employee type	Position	Supervisors	Authorization
Expected pay (view only)	Compensation	Supervisors	Authorization
FLSA status	Position	Supervisors	Authorization
Holiday schedule	Position	Supervisors	Authorization

Copyright © 1988-2006, Oracle. All rights reserved.

Request Type	Page	Submitted By	Routed To
Job code #	Job	Supervisors	Authorization
LEO position	Position	Supervisors	Authorization
Locality/LEO adjustment	Compensation	Supervisors	Authorization
Location	Job	Supervisors	Authorization
Marital status	Personal Data	Employees/supervisors	HR department
Medicare entitlement date	Personal Data	Employees/supervisors	Authorization
Military status	Personal Data	Employees/supervisors	Authorization
Name/address/birth/phone	Personal Data	Employees/supervisors	Authorization
Nonpay data	Employment 2	Supervisors	Authorization
Other pay information	Compensation	Supervisors	Authorization
PAR remarks	Data Control	Supervisors	Authorization
Pay group/frequency	Position	Supervisors	Authorization
Pay plan/table/grade/step	Compensation	Supervisors	Authorization
Permanent/RIF/tenure	Employment 2	Supervisors	Authorization
POI	Position	Supervisors	Authorization
Position #	Job	Supervisors	Authorization
Probation dates	Employment 2	Supervisors	Authorization
Quoted pay data	Compensation	Supervisors	Authorization
Reports to position	Job	Supervisors	Authorization

Copyright © 1988-2006, Oracle. All rights reserved.

Request Type	Page	Submitted By	Routed To
Retained grade	Employment 2	Supervisors	Authorization
Review date	Employment 1	Supervisors	Authorization
Service computation dates	Employment 1	Supervisors	Authorization
Service conversion dates	Employment 1	Supervisors	Authorization
SF-50/SF-52	Data Control	Supervisors	Prints reports
SF-113G ceiling	Position	Supervisors	Authorization
Shift details	Position	Supervisors	Authorization
Tax location	Job	Supervisors	Authorization
Tracking (job) data	Data Control	Supervisors	Authorization
Union information	Employment 2	Supervisors	Authorization
Veteran's Info	Personal Data	Employees/supervisors	Authorization
Within-grade-increase data	Employment 1	Supervisors	Authorization
Work schedule	Position	Supervisors	Authorization

Personnel Actions and Employee Status

When you request a personnel action to make changes to employee job data, the employee status often changes. For example, when you select *Retirement,* the employee status changes from *Active* to *Retired.* Similarly, if you terminate an employee due to death, the employee status changes from *Active* to *Deceased.* The employee status is based on either the personnel action, or in a few cases, the reason for the action, such as death. The system sets employee status as follows.

Copyright © 1988-2006, Oracle. All rights reserved.

When you select the personnel action	The system sets the employee status to
Hire. Applicant hire. Rehire. Concurrent appointment. Detail assignment. End of detail. Terminate detail assignment. Return from LWOP. Return from disability (LWP). Recall from suspension/furlough. Intnl assignment.	*Active*
Leave with pay. Short-term disability. Long-term disability.	*Leave of Absence*
Paid leave of absence. Short-term disability with pay. Long-term disability with pay.	*Leave with Pay*
Retirement with pay.	*Retired with Pay*
Terminated with benefits. Terminated with pay.	*Terminated with Pay*
Furlough. Suspension.	*Suspended*
Retirement.	*Retired*
Intl assignment completion. Termination.	*Terminated*

Copyright © 1988-2006, Oracle. All rights reserved.

When you select the personnel action	The system sets the employee status to
Termination (reason of death).	*Deceased*
Pay rate change. Change to lower grade. Data change. Earnings distribution change. Job reclassification. Position change. Probation. Completion of probation. Promotion Extension of NTE date. Award-monetary. Award-nonmonetary. Bonus. Reassignment/conversion. Family benefits change.	The system sets the employee status to the same status that's in the previous data row. If no previous data row exists, the system sets the status to *Active.*

When an employee status is set to *Active, Leave with Pay, Retired with Pay,* or *Terminated with Pay,* the system triggers payroll processing in PeopleSoft Enterprise Payroll and PeopleSoft Enterprise Payroll Interface.

If your agency uses PeopleSoft Enterprise Payroll for North America, payroll paysheets aren't generated for employees whose status is *Retired* or *Terminated.* You may need to pay employees for a partial pay period or for a time after they leave the agency, however, so use either the personnel action *Retired with Pay* or *Terminated with Pay* to ensure that this occurs.

A change in employee status can affect PeopleSoft Enterprise Human Resources Manage Base Benefits, PeopleSoft Enterprise Benefit Administration, and PeopleSoft Enterprise Payroll processing. Specifically for benefits, you may need to suspend coverage during a leave of absence or a suspension. In addition, a promotion or a job reclassification might affect an employee's benefit coverage.

Changes in an employee's status can also impact pension administration.

Importance of Effective Dates

You usually update employee job data in PeopleSoft Enterprise Human Resources for U.S. Federal Government by adding effective-dated data rows to the employee records. When you insert a new row on the Data Control page, the system copies the contents of the previous row into the new row so that you don't have to retype the information that stays the same. (So before you insert a new row, ensure that you're on the data row that you want to copy.) The only new information you see is the effective date, which defaults to the system date, usually today's date, which you can change.

If you want to work on the Employment 1 or 2 pages, for example, first insert a new data row on the Data Control page, and then access the appropriate Employment page to enter changes.

 Copyright © 1988-2006, Oracle. All rights reserved.

Effective dates enable you to maintain a complete chronological history of all your data and tables, whether you changed them two years ago or want them to go into effect in two months. With all this information at your fingertips, you can roll back your system to a particular time to analyze position data or employee records. Or you can roll forward and set up tables and data before they take effect.

The system also uses effective dates to compare pages and tables to ensure that the prompt tables list only the data that is valid as of the effective date of the page where you are working. For example, let's say you create a new department code with an effective date of May 1, 1997. If, on the Job Data pages, you enter a new data row for an employee or update an existing row that has an effective date *before* May 1, 1997, then when you select a department, you won't see the new code as a valid choice because it isn't in effect yet.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "(USF) Setting Up Human Resources Management Tables"

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "(USF) Setting Up the Work-in-Progress Management System"

Multiple Actions with the Same Effective Date

On occasion, you may need to enter more than one personnel action that takes effect on the same day. Entering two actions with the same effective date is particularly common when you need to track annual pay adjustments and career promotions that take effect on the same day. Use effective sequence numbers to combine multiple actions and specify which one to process first. On the Data Control page, enter an actual effective date and assign the action, and the system automatically assigns a transaction number/sequence for each personnel action: The first on that date as *1/1* and the second as *2/1*.

For example, an employee received a pay rate change and a promotion on the same day. As a result of this pay rate change, that employee's salary was raised by about 2.5 percent. A promotion from a GS-07 position to a GS-09 position produced an additional 7.9 percent increase in salary.

Note. The sequence number for a request is always *1* unless you are canceling or correcting a request that has already been completed and processed. In this case, the system would assign a sequence number of *2* for that action.

To enter multiple personnel actions with the same effective date:

1. Open the Data Control page for the employee whose data you're requesting to update.
2. For the first personnel action, insert a new data row.
3. Enter a new actual effective date.

   Because it is the first action processed for this actual effective date, the Transaction #/Seq # field is *1/1*.
4. Enter any other information required to implement the action, either here or in other pages in the component.
5. Change the PAR Status on the Data Control page to *Requested* so that you can continue on to enter the next action.
6. To enter the second action, such as *Promotion,* insert another data row.
7. Enter the same actual effective date as the first action.

   The system enters a Transaction#/Seq of *2/1*.
8. Continue the same steps required for the first action, entering a new action each time.

Copyright © 1988-2006, Oracle. All rights reserved.

Note. If two name changes are submitted for the same person on the same day and a Personnelist logs on and navigates to Worklists, two entries are displayed (one for each name change request), but both link to the most recent request on the PAR pages. If the Personnelist approves and processes the second one but leaves the first one in REQ status, a warning message is displayed that indicates that the Reviewed check box should be selected before processing the request. This warning message alerts the Personnelist to review the possible impact of processing one request before others that are scheduled to take effect on the same day or in the future.

Employee Data Security Considerations

When you reassign employees from one department to another using a data row containing an effective-date sequence number, the system currently allows users with security access to the old or new department to have access to all the employee data. PeopleSoft delivers the system this way because implementing security in system views specific to the function Max (effseq) on PS_JOB would adversely affect online response time.

For example, when you reassign an employee from department one to department two and give the employee a promotion on the same day, because an effective-date sequence number is in the reassignment data row, users with access to either department one or two have access to the employee data.

If you want to modify the system to prevent this, change the security views for the PeopleSoft applications you use. Bear in mind, however, that making the change affects system performance.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Performing Common Personnel Actions

This section discusses how to:

- Grant performance awards.
- Enter promotional information.
- Request departmental reassignments.
- Request a leave of absence.
- Enter terminations and retirement requests.
- Request a supplemental or correction individual retirement record.
- Request terminations due to death.
- Request to rehire an employee.

 Copyright © 1988-2006, Oracle. All rights reserved.

Page Used to Grant Performance Awards

Page Name	Object Name	Navigation	Usage
Award Data	GVT_AWD_DATA	Workforce Administration, Job Information, HR Processing USF. Add a new row on the Data Control page. Enter *BON* (bonus) in the Action field and enter an associated value in the Reason Code field. (These steps activate the Award Data link.) Click the Award Data link.	Assign an award to a federal employee and enter award, informational, and payroll details.

Granting Performance Awards

Recognizing and rewarding employee performance is a critical component of attracting and keeping top talent. PeopleSoft Enterprise Human Resources handles the complexity of this human resource area by making it easy to establish, record, track, and grant employee awards and bonuses.

Begin the process to grant an award by submitting a request to issue a bonus or award. The data is automatically sent through the approval process, tracked, approved, recorded, and issued to the employee.

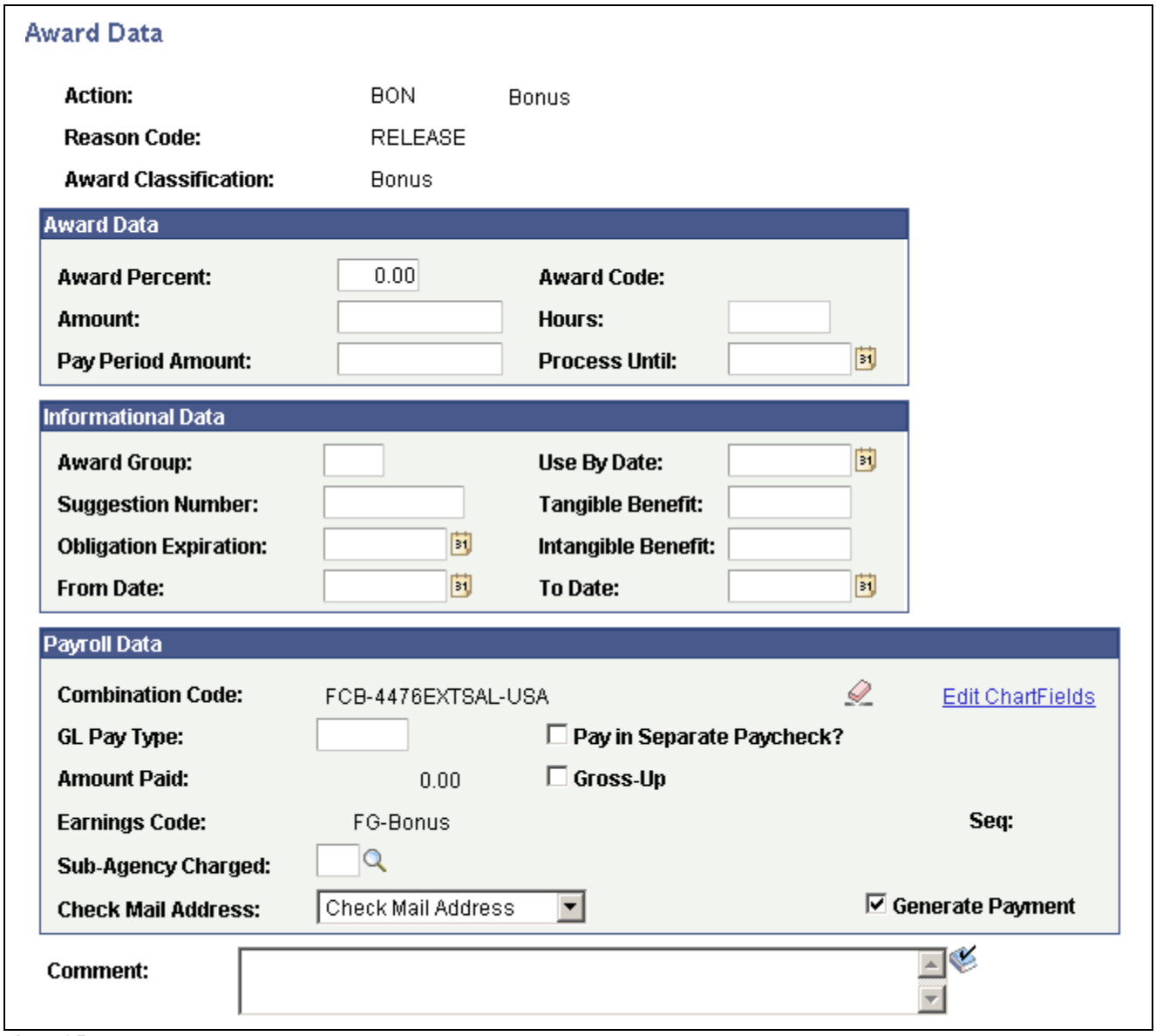
To issue an award:

1. Set up the Award Action Data page to define monetary and nonmonetary award types.
2. Request an award or bonus for your employee on the Data Control page.

   Submit your request the same as you would for other personnel actions.
3. Define the award setup using the Supervisor Request - Data Control page.

Access the Award Data page.

Copyright © 1988-2006, Oracle. All rights reserved.



Award Data page

Award Data

Award Percent Percent of pay to be paid as an award.

Award Code NFC award code defaults from the Award Action definition.

Amount Award amount granted.

Hours Hours granted as an award.

Pay Period Amount and **Process Unitl** Award amount paid each pay period until a specified date.

Informational Data

From Date Award begin date (NFC only).

Copyright © 1988-2006, Oracle. All rights reserved.

To Date Award end date (NFC only).

Payroll Data

Combination Code, GL Pay Type, Amount Paid, Earnings Code, Pay In Separate Paycheck, Gross Up The information in these fields defaults from the Award Action definition.

Sub Agency Charged The accounting station charged for cash award if not the employee's accounting station (NFC Only).

Check Mail Address Indicator Specify where NFC should mail an award check. For example, the award may not get mailed to the employee's address, but instead to an office for a ceremony (NFC Only).

Generate Payment Select to generate the award payment (NFC Only).

Note. When you save this page, payroll data is written to the Additional Pay table for Payroll for North America customers only.

Entering Promotional Information

When an employee changes pay grades or moves to a new job, salary changes are typically part of that personnel action.

To enter promotional information:

1. Insert a new data row on the Supervisor Request - Data Control page, and complete all fields.
2. When you are ready to submit the request, ensure that the PAR Status is *REQ*.

   The workflow system then picks up this information and routes it through the process. After that, you can still change, withdraw, or deny the information up until the point that the action has been finalized and has a status of *Processed.* To correct or cancel the request after it has been completed and has a status of *HR Processed,* go to the Cancellation or Correction pages.

   The information you change on the Data Control page and other pages varies according to the data for the former job and the new job. You usually select a new job code or a new position number by moving to the Job page. But all of the other entries on this page could also conceivably change in the event of a promotion.

   Again, the information you change on the Job page may vary, but you usually select a new pay plan, table, grade, or step and enter (or generate) a new base pay.
3. Once you've completed all the changes caused by the promotion, if necessary, access other pages to enter relevant information.

   For example, access the Personal Data page to enter new business phone numbers. Or access the Position page to change the pay group or employee type, or to enter other relevant position details.
4. Change the position as necessary on the Supervisor Request - Job page.
5. Select a pay rate determinant on the Supervisor Request - Compensation page.
6. Set the options in the Within-Grade Increase Data group box on the Supervisor Request - Employment 1 page as follows:

Copyright © 1988-2006, Oracle. All rights reserved.

Actions	Impact
Promotion (nature of action 702) WIGI (NOA 893) GM WIGI (NOA 891)	Sets the WIGI status to *waiting.* Sets the WIGI due date to the pay begin date, which is the first pay begin date after the employee has satisfied his or her next increase waiting period. Sets the LEI date and last increase date to the effective date of the action.
Quality step increase (QSI) (NOA 892)	Sets the WIGI status to *waiting.* Sets the WIGI due date to the pay begin date, which is the first pay begin date after the employee has satisfied his or her next increase waiting period. The WIGI due date is based on the last equivalent increase date, not the effective date of the action. Sets the last increase date to the effective date of the action. (Has no effect on the LEI Date.)
Change to lower grade (NOA 713)	Issues a warning message "Warning -- Change to Lower Grade Personnel Action may have an impact on WGI Due Date -- Adjust accordingly." Always review current or future-dated records and make manual adjustments that may be required for any change to lower grade action.
Temporary promotion (NOA 703)	Sets the WIGI status to *NA*. Sets the WIGI due date to *Blank.*

Requesting Departmental Reassignments

The description given here is for reassigning employees among departments. Agency-to-agency transfers are processed as hires and terminations.

To enter a reassignment request when a person is assigned to a new department without changing job codes:

1. Use the Data Control page to enter reassignment requests.

   Reassignments usually imply that there is no change in pay grade or compensation.
2. If this action is to occur on the same day as another action, insert an Action# in the Action#/Sequence field.
3. Enter the action of *Reassignment/Conversion.*
4. Enter the reason code, such as *Employee Request* or *Manager Request*.
5. Complete all other necessary changes, such as NOA Code and Authority (1) and (2).
6. Access the Job page to enter additional changes for the employee being reassigned.

Copyright © 1988-2006, Oracle. All rights reserved.

Change the position number, job code, agency, and any other details that will change with the employee reassignment. When you select a new department for the employee, the system automatically enters a new location and tax location if you've associated a location with the department in the Department table.

7. Access other pages to enter any other employment or job information applicable to the reassignment.

   For example, you may need to go to the Personal Data page to enter a new phone number. On the Personal Data page, click the Personal Phone Numbers button, and on the Personal Phone Numbers page, enter a new business phone number. On Employment 2, change the supervisor ID to the manager of the new department. Access other pages, such as the Position page to change the pay group, employee type, or other relevant position details.

Security Considerations

PeopleSoft Enterprise Human Resources enables users to assign employees into departments that they can't access for updates. If you want to prevent users from reassigning an employee into a department for which they don't have access, PeopleSoft Enterprise Human Resources contains a view (DEPT_TBL_ACCESS) that displays only those department IDs that users can access based on their user security profiles.

If you choose to use this view, you must create a class of users who have access to all departments so that they can perform reassignments.

See Also

Chapter 6, "Increasing the Workforce," page 133

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Requesting Leave of Absence

At some point in their careers, many employees take leaves of absence. For example, when an employee or an employee's wife has a baby, the new parent may request a maternity or paternity leave.

To enter a leave of absence:

1. Access the Data Control page to submit a request for the employee who is temporarily leaving the agency.
2. Access the Non Pay Data page to enter leave of absence data for an employee.

   In the Last Date Worked field, enter the last date the employee worked. When you process the PAR to return the employee to pay status, you must update the other fields (SCD Hours, Probation Hours, and Career Tenure Hours), as appropriate.
3. When an employee returned from leave, return to the Data Control page to change that employee's status to *active*.
   a. In the Action field, select *RFL* (return from leave without pay).
   b. In the Reason Code field, select *RFL* (return from leave).
   c. In the PAR Status field, select *Requested* or leave it as *Initiated* in case the return date changes for any reason.
   d. Access any other pages to make needed changes.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Copyright © 1988-2006, Oracle. All rights reserved.

Entering Terminations and Retirement Requests

When employees leave the agency permanently, you render their records and their statuses inactive by registering them as *Terminated* or *Retired.* The processes for entering terminations and retirements are almost identical; the primary difference is the action you select on the Data Control page.

To enter termination and retirement requests:

1. Request a termination for an employee who has left the agency using the Data Control page.

   The Actual Effective Date field defaults to the system date, usually today's date, which you can change.

   Normally, the system uses the effective date to represent the *beginning* of an action; however, when an employee terminates or retires, the system treats the effective date you enter as the close of business of the day of the termination.

   For example, if an employee's last day of employment is September 1, the effective date is September 1 because the termination is effective at the close of business that day.

2. In the Action field, select one of the following: *Termination, Terminated with Pay, Terminated with Benefits,* or *Retirement,* and then select a reason code for the departure, if applicable.

   Depending on the action you selected, the system changes the employee status from *Active* to *Terminated, Terminated with Benefits or Pay,* or *Retired.*

3. If the employee is suitable for rehire, save this page.

   When you request a termination or retirement, the system generates an individual retirement record (IRR) control record for this employee.

Note. The IRR process is used by agencies using PeopleSoft Enterprise Payroll. Payroll detail earnings and deductions for the fiscal history are used in the IRR process.

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "(USF) Generating IRR and ROST Reports," Understanding the IRR Process

Requesting a Supplemental or Correction Individual Retirement Record

After you process an employee's IRR, you may find that you need to supplement or make corrections to that IRR. This requires that you create another PAR using the Workforce Administration, Job Information, Supplement to IRR or Correct IRR Supplement menu.

When you create the new PAR, the system creates an IRR control record with an IRR type of *C* (correction) or *S* (supplemental).

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "(USF) Generating IRR and ROST Reports," Generating Supplemental or Correction IRRs

Requesting Terminations Due to Death

To request termination due to death:

1. Open the Data Control page for the deceased employee.

 Copyright © 1988-2006, Oracle. All rights reserved.

2. In the Action field, indicate that the employee is *Terminated.*
3. In the Reason Code field, select *Death* as the reason for termination.

   The system automatically changes the Employee Status field from *Active* to *Deceased.*

Requesting to Rehire an Employee

When you request to hire an employee who worked for your agency in the past, enter a *Rehire* action. Information on a rehired employee is already in PeopleSoft Enterprise Human Resources unless the employee data was deleted or archived. If employee records aren't in the system, follow the new hire process described in "Hiring Your Workforce."

You can rehire only employees whose employee status is *Terminated, Terminated with Pay, Terminated with Benefits, Retired,* or *Retired with Pay.* If you rehire an employee whose records already exist in the system, you may want to ensure that the personal, employment, and job data for that person is current.

If you want to rehire an employee whose previous job was in a department (organizational entity) for which you don't have security access, give at least one user performing rehires security access to all departments.

To request to rehire an employee into the system:

1. Open the Data Control page for the employee and request a rehire.
2. Access the other employee data pages to enter additional information.

Copyright © 1988-2006, Oracle. All rights reserved.

 Copyright © 1988-2006, Oracle. All rights reserved.

CHAPTER 19

(USF) Processing Automatic Actions for Probation, Tenure, and WGIs

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

- Perform automatic actions.
- Administer probation termination automatic actions.
- Administer tenure conversion automatic actions.
- Administer within-grade increases (WGIs).

Understanding Automatic Action Processing

This section lists prerequisites and provides an overview of processing automatic actions.

Prerequisites

For the Automatic Actions process to work as described, you must first activate workflow and set up supervisors in the workflow process. Consult your system administrator for information.

Before you can administer automatic actions for your employees, you must have already entered them into the system using one of the components in Workforce Administration.

You should designate one or more employees, perhaps from your human resources or payroll office, to administer the Automatic Actions processes. As delivered, the system sends supervisor notifications to the employee's supervisor's worklist based on WGI, tenure, and probation information already in your system. This information, most of which you entered during the hire process, initiates the automatic action processes. Run the Automatic Action processes regularly, as determined by your organization's needs. If necessary, manually change employee records to process special cases.

Before implementing Automatic Actions, decide how often your agency should run each process. For example, within-grade increases generally take effect on the first day of a pay period, so you might choose to process step increases only once per pay period. On the other hand, if supervisors review notices every Thursday morning, you should run 60-day notification processes weekly. Some agencies run the notification processes nightly to accommodate multiple supervisors and to allow for maximum time to verify upcoming employee record changes.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Delivered Workflows for PeopleSoft HRMS"

Chapter 7, "(USF) Adding an Employment Instance," Adding an Employment Instance, page 239

Copyright © 1988-2006, Oracle. All rights reserved.

Processing Automatic Actions

Your agency's human resources personnel have many tasks to oversee: recruiting new employees, making hiring decisions, administering reviews, and tracking changes in employees' personal data, among others. Unfortunately, much of their time can be spent processing routine, tedious data. PeopleSoft Enterprise HRMS USF functionality automates some of these routine tasks, leaving your professionals free to spend time on other projects that require their professional insight and skills.

The PeopleSoft Enterprise Human Resources Administer Workforce business process offers an Automatic Actions process to administer these routine tasks:

- Probation termination.
- Tenure conversion.
- WGIs.

If you activate workflow, PeopleSoft Enterprise Human Resources alerts you of upcoming waiting period terminations or step increases and then automatically updates employee records without user intervention. After you assign supervisors to review automatic action notices, you won't forget these important dates.

The procedure is identical for all three automatic actions:

1. Run a process to identify employees with upcoming probation terminations, tenure conversions, or within-grade increases in the next 60 days.

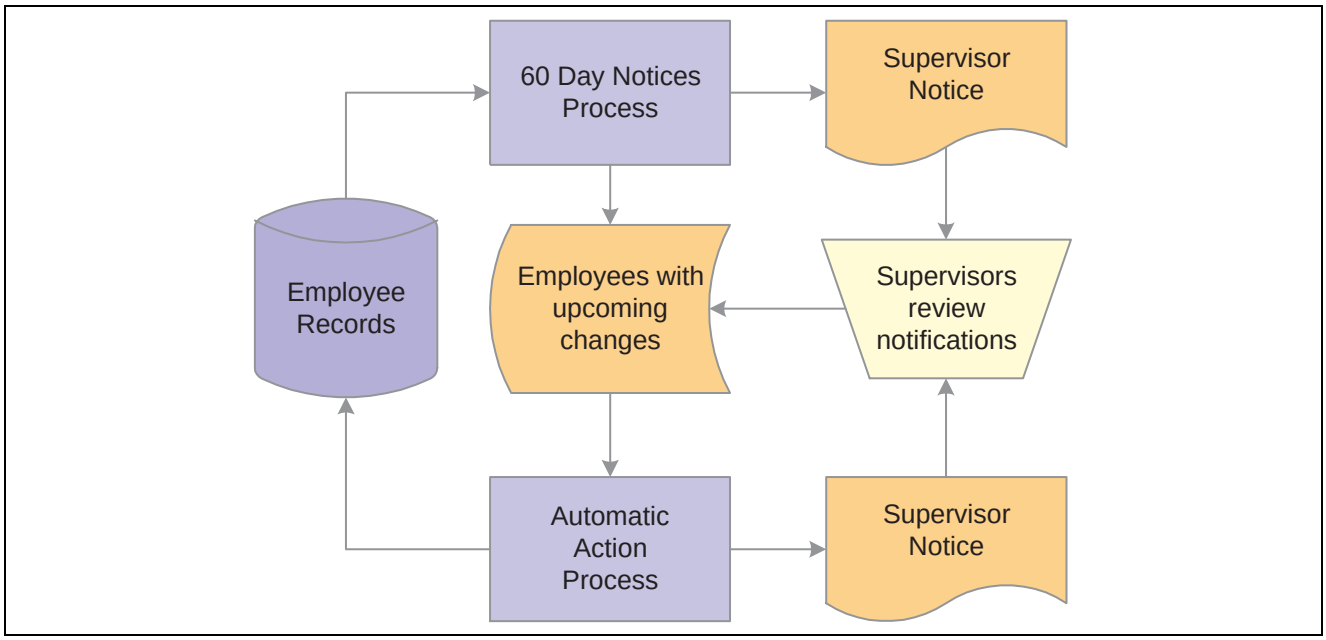
   The system creates online notifications of upcoming changes and sends them to the worklist of designated supervisors.

2. Review online notifications and make any necessary changes to employee records.

   Unless you change status or date fields in the employee's records to stop the update from occurring, the respective process updates the employee's records.

3. Run a process on the specified date to change employee records.

   This process also creates notices and sends them to supervisor worklists.



Processing Automatic Actions

Copyright © 1988-2006, Oracle. All rights reserved.

Performing Automatic Actions

To set up Automatic Action messages, use the Automatic Action Msgs (GVT_AUTOACTNMSG_TB) component.

This section provides an overview of the menus and pages used for each Automatic Action process and discusses how to:

- Process automatic actions.
- Run the Load Within Grade Increases process.

Understanding the Menus and Pages Used for Each Automatic Action Process

The following table provides an overview of the menus and pages used for each automatic action process. However, this table does not include manual setup and verification. Run all of these processes from the Workforce Administration, Collective Processes menu.

Step	Function	Navigation	Option to select in PeopleSoft Process Scheduler	Process Type and Name
1	Identify employees, create notices, and send notices to supervisor worklists.	Process Automated Actions USF	60 Day Probation Term Notices	Application Engine FGHR003A
			Or 60 Day Tenure Notices	Application Engine FGHR004A
			Or 60 Day WGI Notices	Application Engine FGHR002A
2	Update employee records and send notices to supervisor worklists.	Process Automated Actions USF	Process Probation Terminations	Application Engine FGHR003B
			Or Process Tenure Conversions	Application Engine FGHR004B
		Or Process WGI Auto Action USF	Load Within Grade Increases	Application Engine FGHR002B

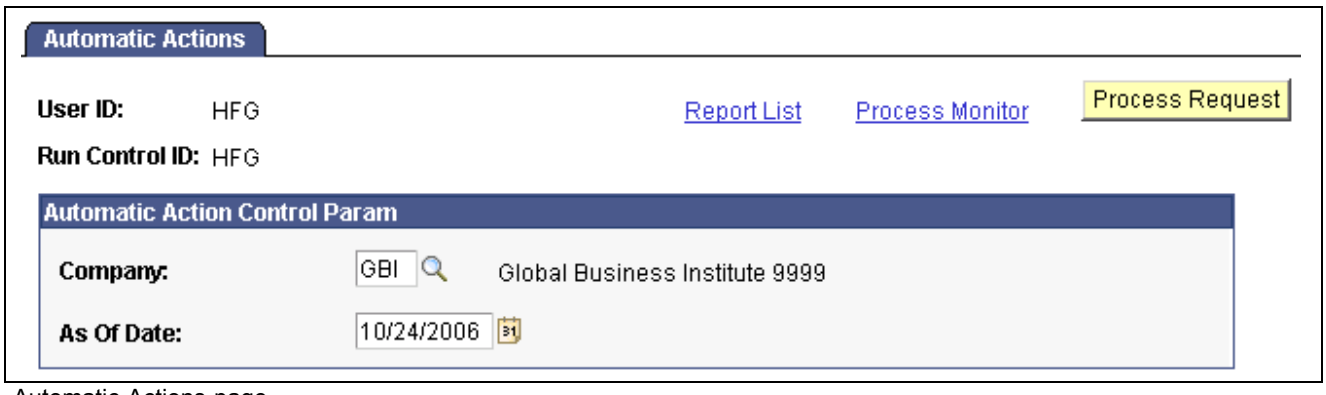
Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Perform Automatic Actions

Page Name	Object Name	Navigation	Usage
Automatic Action Message Table	GVT_AUTOACTMSG_TBL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Automatic Action Msgs, Automatic Action Message Table	Define Automatic Action messages.
Automatic Actions	RUNCTL_AUTO_ACTNS	Workforce Administration, Collective Processes, Process Automated Actions USF, Automatic Actions	Specify automatic action run control parameters for the probation termination and tenure conversion processes.
WGI Action	RUN_FGHR002B	Workforce Administration, Collective Processes, Process WGI Auto Action USF, WGI Action	Specify automatic action run control parameters for processing WGIs.
60 Day Prob Term (60 day probation term)	GVT_PROB_END_NOTE	Workforce Administration, Collective Processes, Probat Term-Supv Notif USF, 60 Day Prob Term	View impending probationary period termination notifications online.
60 Day Ten Conv (60 day tenure conversion)	GVT_TEN_END_NOTICE	Workforce Administration, Collective Processes, Tenure Conversion Notice USF, 60 Day Ten Conv	View 60-day tenure notifications online.
WGI Notice (within-grade increase notice)	GVT_WGI_NOTICE	Workforce Administration, Collective Processes, Within Grade Incr Notice USF, WGI Notice	View impending WGI notifications online.

Processing Automatic Actions

Access the Automatic Actions page.



Automatic Actions page

Company Enter the company for which you would like to identify employees and create notifications.

Copyright © 1988-2006, Oracle. All rights reserved.

As Of Date The as of date is set by default to the system date. The process identifies all rows with a probation date within 60 days in the future from this date.

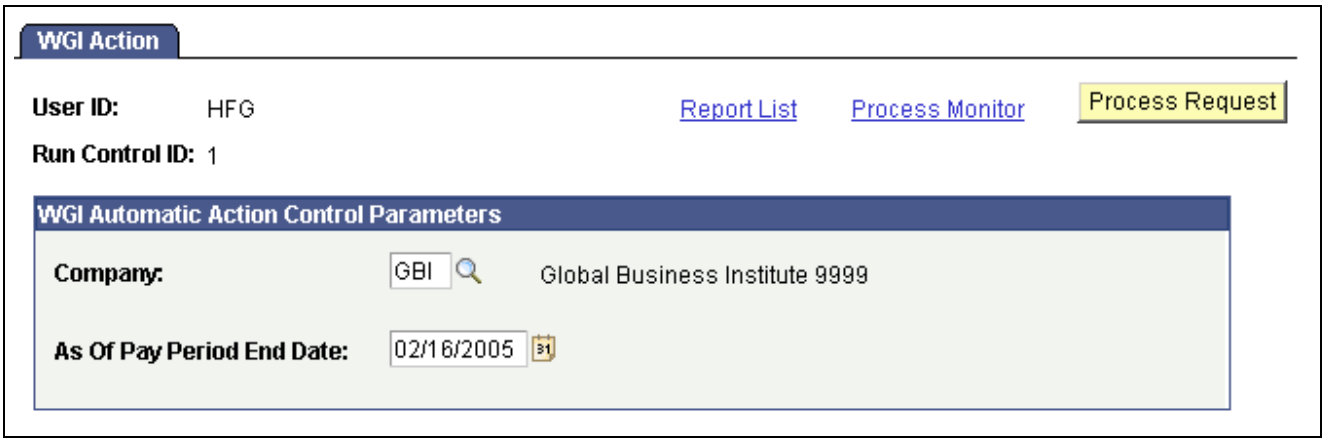
Process Request Click to run this request. PeopleSoft Process Scheduler runs the Automatic Actions process at user-defined intervals.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Running the Load Within Grade Increases Process

Access the WGI Action page.



WGI Action page

Company Enter the company for which you would like to process WGIs.

As Of Pay Period End Date This field is set by default to the system date, but you must change it to a valid pay period end date for the pay calendar you have created. The system processes within-grade increases for employees with a WGI due date before this date, usually the begin date for the same pay period. However, the system also processes WGIs due before this pay period-retroactive WGIs.

Administering Probation Termination Automatic Actions

When you first hire an employee, your agency usually imposes a probation period; most new regular federal employees have one-year probation periods. Supervisory or managerial employees and Senior Executive Service (SES) employees often have different probation periods, which you track separately.

The probation termination automatic action, like other automatic actions, identifies employees who will reach their probation termination date within 60 days. After you have activated workflow, the system sends messages to employee supervisors who are designated to process automatic actions. After the supervisors approve the probation termination, run the process to perform the actual changes to employee records, blanking out employee probation dates, indicating that they have met the probation period. Finally, you can send notices of completed probation periods to the designated supervisors' worklists.

This section discusses how to run the probation termination automatic action.

Copyright © 1988-2006, Oracle. All rights reserved.

Running the Probation Termination Automatic Action

To run the probation termination automatic action:

1. Verify all of the data required for automatic probation termination processing.
    a. Verify the employee's probation waiting period (Probation Date) and the position to which the employee reports (Reports To Position) on the Employment 2 page, accessed from the HR Request menu.

       If the employee has multiple data rows, verify only the current row.

    b. Verify accumulated non-pay hours that affect the employee's probation termination date on the Non Pay Data page.
2. Run the 60 Day Probation Term Notices process from the Automatic Actions page.

   During this process, the system performs the following functions:

   - Identifies employees who have a probation termination within the next 60 days, and then creates supervisor notifications. After the notices are created, the supervisor has until the probation termination date to request an extension of the probation period. The system processes the probation termination if the supervisor doesn't respond in time.
   - Adds a row to the automatic action control table (GVT_AUTO_ACTN), which records the employee ID, employee record number, automatic action type, and automatic action date.

     The system differentiates among the three probation termination types: standard, supervisor, and SES. This table also indicates whether the notification was sent to the specified worklist, whether the action was processed, and whether notification of the processed action was sent to the specified worklist.
3. Run the Process Probation Terminations process from the Automatic Actions page.

   The automatic action process updates the records of all employees previously identified in the 60 Day Probation Term Notices process unless the supervisor has extended their probation periods. The probation termination automatic action performs the following functions on the probation termination date:

   - Edits the applicable row in the automatic action control table (GVT_AUTO_ACTN) to indicate that the probation termination was processed.

     This row was created during the 60-Day Probation Term Notices process.
   - Clears the probation date on the employee's current Employment 2 page.
   - Creates a supervisor notice indicating that the probation termination was processed.
4. View notices of upcoming probation terminations on the 60 Day Prob Term page.

   Supervisors and human resources officials can view 60-day notifications online. After viewing these online messages of impending probationary period termination, they should verify that the employee will fulfill all of your agency's requirements by the specified date. To extend the probation period, the supervisor should request a personnel action to change the probation date on the employee's Employment 2 page. If the employee's probation date isn't changed, the probation termination will occur on the date indicated.

See Also

Chapter 7, "(USF) Adding an Employment Instance," Assigning Employees to Positions, page 279

Chapter 7, "(USF) Adding an Employment Instance," Adding an Employment Instance, page 239

 Copyright © 1988-2006, Oracle. All rights reserved.

Administering Tenure Conversion Automatic Actions

Most of your conditional and career-conditional new hires are subject to tenure conversion waiting periods. If you specify this period when you first hire the employee, the tenure conversion automatic action alerts you of upcoming tenure conversion dates and changes employee records to reflect the tenure conversion.

The tenure conversion automatic action, like other automatic actions, identifies employees who will reach their tenure conversion dates within 60 days. After you activate workflow, the system sends messages to the supervisors you have designated to process automatic actions. After the supervisors approve the tenure conversion, run the process to perform the actual changes to employee records—clearing tenure conversion dates and changing tenure types. Finally, you can send notices of tenure conversions to the designated supervisors' worklists.

This section discusses:

- Running the tenure conversion automatic action.
- Changes made to employee records during tenure conversion.

Running the Tenure Conversion Automatic Action

To run the tenure conversion automatic action:

1. Verify all of the data required for automatic tenure conversion processing.
    a. Verify the employee's service conversion dates, tenure status, and the position to which the employee reports (Reports To Position) on the Employment 2 page, accessed from the HR Request menu.
    b. Verify accumulated non-pay hours that may affect tenure conversion waiting periods on the Non Pay Data page.
2. Run the 60 Day Tenure Notices process from the Automatic Actions page.

    During this process, the system:

    - Identifies employees who will reach their tenure conversion date within 60 days, and then creates supervisor notifications.

      After the notices are created, the supervisor has until the tenure conversion date to request an extension of the waiting period. The system processes the tenure conversion if the supervisor doesn't respond.

    - Adds a row to the automatic action control table (GVT_AUTO_ACTN).

      This table records the Employee ID, Employee Record Number, automatic action type, and automatic action date. The system differentiates between the two types of tenure conversions, career and career-conditional. This row also indicates whether the notification was sent to the specified worklist, whether the action was processed, and whether notification of the processed action was sent to the specified worklist.
3. Run the Process Tenure Conversions process from the Automatic Actions page.

    In this process, the system updates records of employees previously identified in the 60 Day Tenure Notices process, unless the supervisor extended the tenure conversion date. The tenure conversion automatic action performs the following functions on the tenure conversion date:

    - Edits the applicable row in the automatic action control table (GVT_AUTO_ACTN) to indicate that the tenure conversion was processed.

      This row was created during the 60-Day Tenure Notices process.

Copyright © 1988-2006, Oracle. All rights reserved.

- Inserts an employee data row with updated or deleted tenure conversion dates and changed tenure type.
- Creates a supervisor notice indicating that the tenure conversion was processed.

4. View notices of upcoming tenure conversions on the 60 Day Ten Conv page (60 day tenure conversion page).

   Supervisors and Human Resources officials can view 60-day notifications online. After viewing online messages of impending tenure conversion, they should verify that the employee will fulfill all of your agency's requirements by the specified date. To extend the tenure conversion period, the supervisor should request a personnel action to change the date on the employee's Employment 1 page, as described previously. If they don't change the employee's tenure conversion date, the tenure conversion will occur on the date indicated.

See Also

Chapter 7, "(USF) Adding an Employment Instance," Assigning Employees to Positions, page 279

Chapter 7, "(USF) Adding an Employment Instance," Adding an Employment Instance, page 239

Understanding Changes Made to Employee Records During Tenure Conversion

To understand the changes made to employee records during the Tenure Conversion process, let's look at an example of an employee's data rows.

Effective Date	NOA	Conv Begin Date	Career Conv Date	Career-Cond Conv Date	Tenure
January 1, 1999 = old Career Conv Date	880 = Change in Tenure Status				Permanent
January 1, 1996 = old Career-Cond Conv Date	880 = Change in Tenure Status	January 1, 1996 = current effective date	January 1, 1999 = Conv Begin Date + 3 years		Conditional
January 1, 1994	101 = Career Conditional Appointment	January 1, 1994		January 1, 1996	None

As the table demonstrates, the system inserts a row with an effective date equivalent to the career conversion date or career-conditional conversion date and a nature of action code *880*.

For career-conditional conversions, the system performs the following actions on the new row:

- Blanks out the career-conditional conversion date.
- Changes the conversion begin date to the effective date of the current row.
- Inserts a career conversion date three years in the future.

  You can change this date.

 Copyright © 1988-2006, Oracle. All rights reserved.

- Changes the tenure type from *None* to *Conditional.*

For career conversions, the system performs these actions on the new row:

- Blanks out the career conversion date.
- Blanks out the conversion begin date.
- Changes the tenure type from *Conditional* to *Permanent.*

Administering WGIs

Keeping track of WGIs for all of your agency's employees can be a time-consuming, labor-intensive process. Using workflow, which you activate and set up, PeopleSoft Enterprise Human Resources automates the entire process, from identifying upcoming step increases to updating employee records after the increase has occurred. All employees who meet minimum performance standards will receive the proper step increase and concurrent pay raise at the end of the step waiting period.

This section provides an overview of 60 day WGI notices and of the load within grade increases process and discusses:

- Running the WGI automatic action.
- Entering data that affects WGI automatic actions.

Understanding the 60 Day WGI Notices

The system identifies and differentiates among employees who have a WGI Status of *Waiting* or *Approved* and a WGI Due Date up to 60 days in the future, but do not meet all automatic WGI criteria. Employees are classified into four different WGI automatic action types.

Automatic Action Type	Explanation
Within Grade Increase	These employees receive an automatic WGI within 60 days.
Manual WGI	You need to process these employees' WGIs manually. For example, employees with intermittent or seasonal work schedules require manual WGI processing.
Retroactive WGI	These employees have a WGI status of *Waiting,* but were due a WGI in a previous pay period.
WGI W/O Min. Performance	These employees have an overall review rating below *Satisfactory* or do not have a review within the last fifteen months.

Different supervisor notifications are sent for each of these types. However, the system processes WGIs automatically for only the first and third types listed previously, Within Grade Increase and Retroactive WGI.

Copyright © 1988-2006, Oracle. All rights reserved.

Understanding the Load Within Grade Increases Process

To understand the within-grade increase automatic action, consider what happens to an employee with this current row:

Effective Date	NOA	Step	WGI Due Date	WGI Status	Last Increase Date	LEI Date
January 1, 2001	Any	1	May 18, 2001	Waiting		

In March, the notification process identified this employee's upcoming WGI, after which you sent a notification to the supervisor. The supervisor approved the increase and didn't need to change any data.

On May 18, 2001, the WGI due date, the system processes this employee's within-grade increase. It changes the WGI Status in the old row and inserts a new row as follows:

Effective Date	NOA	Step	WGI Due Date	WGI Status	Last Increase Date	LEI Date
May 18, 2001 = old WGI due date	893 = WGI	2	Pay period begin date after Step 2 waiting period	Waiting	May 18, 2001 =old WGI due date	May 18, 2001 =old WGI due date
January 1, 2001	Any	1	May 18, 2001	Created		

As you can see, the system performs six actions during the within-grade increase process:

- Changes the WGI Status to *Created* in the row that was current when the WGI process occurred.

  If the employee has multiple rows with the same WGI due date, the system changes the status of all the rows to *Created.* Only the system enters a status of *Created.*
- Inserts a new row with nature of action code *893* and effective date equal to the old WGI due date.
- Increments the step by one in the new row, and updates step-dependent pay information.
- Calculates the WGI due date for the new row.

  This date corresponds to the beginning of the pay period following the waiting period for the new step.
- Sets the WGI status on the new row to *Waiting.*
- Sets both the last increase date and LEI date on the new row to the old WGI due date.

WGI increases take effect only at the beginning of a pay period. If the WGI due date is the beginning of a pay period, the pay increase occurs on that date—the employee receives the increased pay for the entire period. However, if the WGI due date falls between the beginning and ending dates of a pay period, the pay increase takes effect at the beginning of the following pay period.

Copyright © 1988-2006, Oracle. All rights reserved.

In addition to changing employee records, the system edits the applicable row in the Automatic Action Control table (GVT_AUTO_ACTN) to indicate that the WGI was processed. It also creates a notice indicating that the WGI was processed.

Running the WGI Automatic Action

To process automatic within-grade increases:

1. Verify all of the data required for automatic WGI processing.

   To enable the system to run WGI automatic actions, you must first set up required position and employee data. You may have already entered the necessary information when hiring the employee. Now, verify information throughout your PeopleSoft Enterprise Human Resources system, at both the table level and the employee level. If the employee has multiple data rows, you only need to verify the current row. All of the following conditions must be met for the system to process an automatic within-grade increase:

   a. Selected the Pay Plan is Eligible for Auto Within Grade Increase check box on the Pay Plan Table page.

   b. Defined pay calendars for the current year plus the next three years on the Pay Calendar Table page.

   c. Ensured each step has a next step increment value in the Weeks column on the Salary Step Table page.

   d. Set the overall review rating to *Satisfactory* or better within last 15 months on the Employee Appraisal 1 page.

   e. Selected a work schedule of *Full Time, Baylor Plan,* or *Part Time* on the Position page.

   f. Set WGI status to *Waiting* or *Approved* on the Employment 1 page.

   g. Ensured that the Reports To Position field contains a valid entry on the Employment 2 page.

   h. Verified that the step isn't the highest in grade on the Compensation Data page.

   Note. If you are using the Manage Positions business process, the Report To Position field on the Employment 2 page is unavailable for data entry. To edit the field, select the Position Override check box on the Position Data page and change the position this employee reports to. You can also identify the reports to position on the Position Data – Description page. To do this, select Organizational Development, Position Management, Maintain Positions/Budgets, Update Position Info.

   ---

2. Run the 60 Day WGI Notices process from the Automatic Actions page.

   This process identifies employees with a WGI due date within the next 60 days and a WGI status of *Waiting* or *Approved.* The system:

   - Adds a row to the automatic action control table (GVT_AUTO_ACTN).

     This table records the employee ID, employee record number, automatic action type, and automatic action date. This table also indicates whether the notification was sent to the specified worklist, whether the action was processed, and whether notification of the processed action was sent to the specified worklist.

Copyright © 1988-2006, Oracle. All rights reserved.

- Identifies employees who will receive a within-grade increase within 60 days and creates supervisor notifications.

  After the notices are created, the supervisor has until the WGI due date to deny or postpone the increase. If the supervisor doesn't respond, the system processes the step increase. To prevent the automatic within-grade increase from occurring, the supervisor must change the WGI status to *Denied, Postponed,* or *N/A* on the current row and insert a new row with the new WGI due date and WGI status of *Waiting* or *Approved.* The system also creates notices for employees who have a condition preventing automatic WGI processing.

- Changes the WGI status on the employees' current Employment 1 pages to *Approved,* if the employees meet all of the WGI criteria.

- Sends upcoming WGI notices to supervisor worklists.

3. Run the Load Within Grade Increases process from the WGI Action page.

   In this process, the system updates records of employees previously identified in the 60-Day WGI Notices process, unless you have denied or postponed their increases.

4. View notices of upcoming WGIs on the WGI Notice page.

   After viewing these online messages of impending WGI due dates, verify that the employee will fulfill all of your agency's requirements by the specified date. To prevent the WGI from occurring, you must change the employee's WGI status to *Denied, Postponed,* or *N/A* on the current Employment 1 page. Also, insert a new row with an updated WGI due date and WGI status of *Waiting.* You can also view notices for employees who do not receive automatic WGIs or for whom you must manually process a WGI.

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "(USF) Setting Up Additional U.S. Federal Payroll Functionality," Establishing Pay Plans

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up Pay Calendars," Creating Pay Calendars and FLSA Calendars

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Compensation and Budgeting, "Setting Up Base Compensation and Budgeting," Setting Up Salary Plans, Grades, and Steps

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Employee Reviews, "Managing Employee Reviews"

Chapter 7, "(USF) Adding an Employment Instance," page 237

Entering Data That Affects WGI Automatic Actions

Because the automatic WGI process obtains information from many pages, be aware of entering information that might affect some of the data the system uses.

- Creating a PAR for a Change to a Lower Grade.

  When you create a PAR with nature of action code *713*, the system updates the WGI due date to reflect the change. However, the change may affect the WGI due date and status in many ways. You need to verify that the information entered is correct for your specific circumstances. To remind you, the system displays a warning message.

- Changing the WGI due date.

  When you change the WGI due date, the system checks that the date you entered is the beginning of a pay period. If it isn't, it issues a warning message.

 Copyright © 1988-2006, Oracle. All rights reserved.

- Based on the WGI due date you entered, the system suggests the beginning of the pay period in which your date falls and the beginning of the next pay period.

  You can enter one of these or keep your original date. If you decide to keep the date you've entered, the WGI process still identifies this employee as eligible for a step increase. However, if you enter a WGI due date in the middle of a pay period, the pay increase takes effect only at the beginning of the following pay period.

- Adding historical rows.

  When you insert a row with an effective date earlier than an automatic WGI that has already occurred, the system assigns a WGI status of *Waiting*. You probably do not want the system to process this row in an automatic WGI and should change the WGI status to *N/A*. Depending on the nature of action, you might need to check other information, for example step, on this and subsequent pages.

- Inserting a row with an effective date equivalent to the current WGI due date.

  The system processes the WGI after all other actions with the same effective date. It increments the sequence number of the WGI row it adds.

- If a user creates a manual WGI (NOA = 893) PAR row, any preceding rows that have a WGI status of *Waiting* or *Approved* are updated to a status of *Manual* to indicate that a manual WGI has been inserted.

Copyright © 1988-2006, Oracle. All rights reserved.

 Copyright © 1988-2006, Oracle. All rights reserved.

CHAPTER 20

(USF) Managing Leave

This chapter provides an overview of leave administration and discusses how to:

- Administer automatic leave enrollment.
- Set up leave transfer programs.
- Administer leave donations.
- Administer leave recipients.
- View leave transfer data.
- Report on leave transfer programs.

Understanding Leave Administration

This section lists prerequisites and discusses:

- Automatic leave enrollment administration.
- Leave transfer management.

Prerequisites

Set up Earnings codes and Earnings Accrual Classes.

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Defining Earnings Codes and Earnings Programs"

Automatic Leave Enrollment Administration

Use automatic leave enrollment functionality to enroll an employee automatically in an earnings accrual class with personnel action request (PAR) activity or approval to participate in a leave program. The system automatically populates the employee's leave enrollment record with default enrollment values based on the leave class rules you set up. You can manually override the defaults.

Here are the steps in administering automatic leave enrollment:

1. Set up the Leave Class Rules template (one-time set up).
2. Set up Leave Class Rule criteria (one-time set up).
3. Process PAR activity or approval to participate in a leave program.
4. Run the Auto Leave Enrollment process.

Copyright © 1988-2006, Oracle. All rights reserved.

5. Review the results of the Auto Leave Enrollment process.
6. Adjust enrollments as necessary.

Leave Transfer Management

Each Federal Government agency may establish and administer procedures to permit the voluntary transfer of annual leave between Federal Government employees in a time of crisis. A crisis can be a personal medical emergency or a situation deemed as an emergency of the agency.

There are three types of programs in which employees may donate or receive annual leave hours. These programs have similar but slightly different eligibility or usage rules. Employees may participate in more than one program.

Voluntary Leave Transfer Program (VLTP)	Employees donate and receive annual leave hours directly from each other.
Emergency Leave Transfer Program (ELTP)	Employees donate and receive hours through an agency-managed emergency bank that has been created to deal with a specific emergency.
Leave Bank	Employees donate and receive hours through an agency-managed leave bank.

Administering Automatic Leave Enrollment

To set up leave class rules, use the Leave Class Rules Criteria USF (GVT_LVCLSRUL_TMPLT) and Leave Class Rules USF (GVT_LV_CLS_RULES) components.

This section discusses how to:

- Set up the leave class rules template.
- Set up leave class rules criteria.
- Process automatic leave enrollment.
- Review automatic leave enrollment.
- Manually enter or adjust leave enrollment.

 Copyright © 1988-2006, Oracle. All rights reserved.

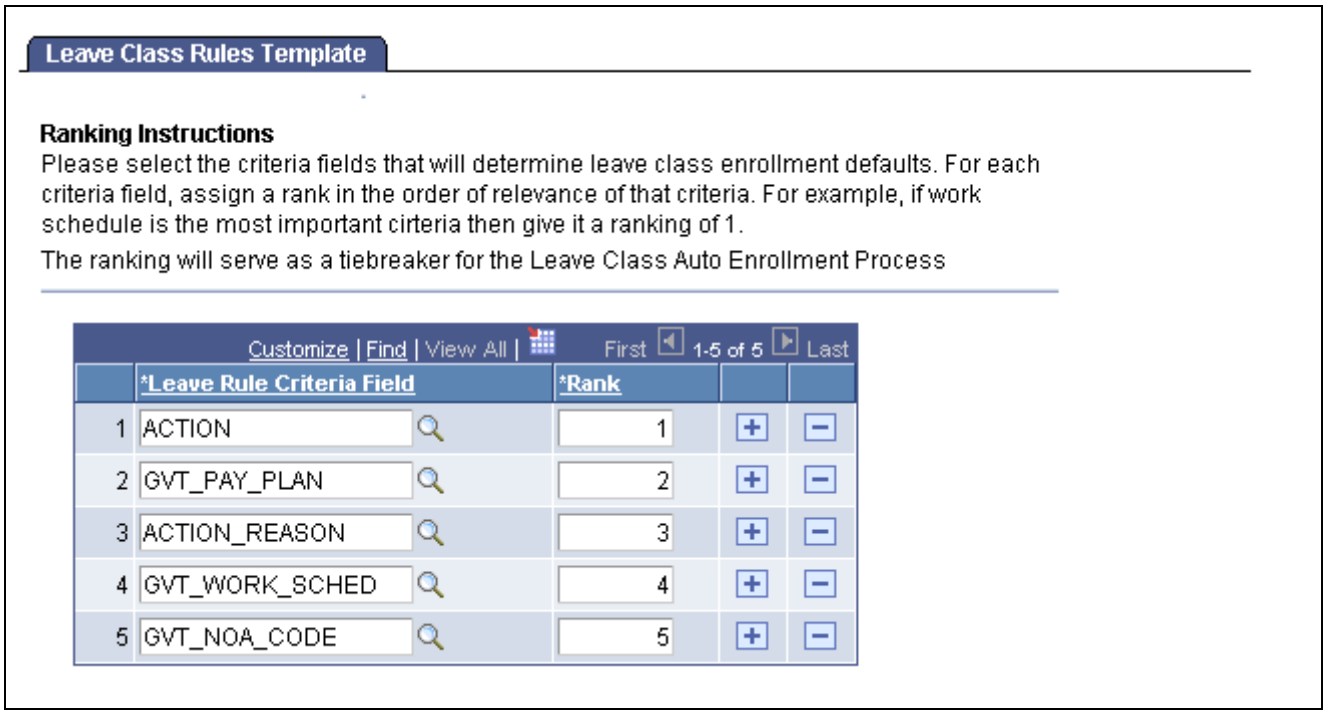
Pages Used to Administer Automatic Leave Enrollment

Page Name	Object Name	Navigation	Usage
Leave Class Rules Template	GVT_LVCLSRUL_TMPLT	Set Up HRMS, Product Related, Workforce Administration, Absence, Leave Class Rules Criteria USF, Leave Class Rules Template	Rank five rules criteria for the purpose of breaking ties if an employee qualifies under more than one leave class rule.
Leave Class Rules	GVT_LV_CLS_RULES	Set Up HRMS, Product Related, Workforce Administration, Absence, Leave Class Rules USF, Leave Class Rules	Define your organization's rules for enrolling or terminating an employee from an earnings (leave) accrual class.
Automatic Leave Enrollment	RUNCTL_FGASOFDT	Workforce Administration, Leave Administration USF, Manage Leave Information, Request Auto Leave Enrollment, Automatic Leave Enrollment	Run the process that automatically enrolls employees in earnings accrual classes based on the PAR or leave program activity and the leave class rules.
Leave Class Auto Entry Audit	GVT_LVCLS_TRGR	Workforce Administration, Leave Administration USF, Manage Leave Information, Track Auto Leave Enrollment, Leave Class Auto Entry Audit	Review the results of the Leave Class Auto Enrollment process.
Employee Accruals	GVT_ACCR_PLAN	Workforce Administration, Leave Administration USF, Manage Leave Information, Employee Accruals Enrollment, Employee Accruals	Adjust employee enrollment in earnings accrual classes if there is a reason to override the automatic enrollment. If your organization does not use the automatic leave enrollment process, use this page to enroll employees in accrual classes.

Setting Up the Leave Class Rules Template

Access the Leave Class Rules Template page.

Copyright © 1988-2006, Oracle. All rights reserved.



Leave Class Rules Template page

Set up the Leave Class Rules template only once.

Leave Rule Criteria Field Select the PAR criteria and rank them on this page. These criteria correspond to the PAR Criteria fields on the GVT Leave Class Rules page, where you select values for each criterion. The criteria that you select and rank are:

ACTION: action

ACTION_REASON: action/reason.

GVT_NOA_CODE: nature of action code.

GVT_PAY_PLAN: pay plan.

GVT_TYPE_OF_APPT: type of appointment.

GVT_WORK_SCHED: work schedule.

Rank Rank each criterion in order from 1 to 5, with 1 being the highest rank. The single rule where the employee transaction meets the highest-ranking criteria is the rule the system uses as a tiebreaker if an employee qualifies under more than one rule.

Example of Tie Breaking

The following example illustrates how the system uses ranking to resolve situations where the employee qualifies under two different Leave Class Criteria rules.

Copyright © 1988-2006, Oracle. All rights reserved.

Rule 1 Definitions	Rule 2 Definitions
PAR Criteria: Action: HIR Work Schedule: Full-time Pay Plan: GS	PAR Criteria: Action: HIR Work Schedule: Full-time NOA code: 170
Default Enrollments: Annual Leave Sick Leave	Default Enrollments: Annual Leave Sick Leave Home Leave

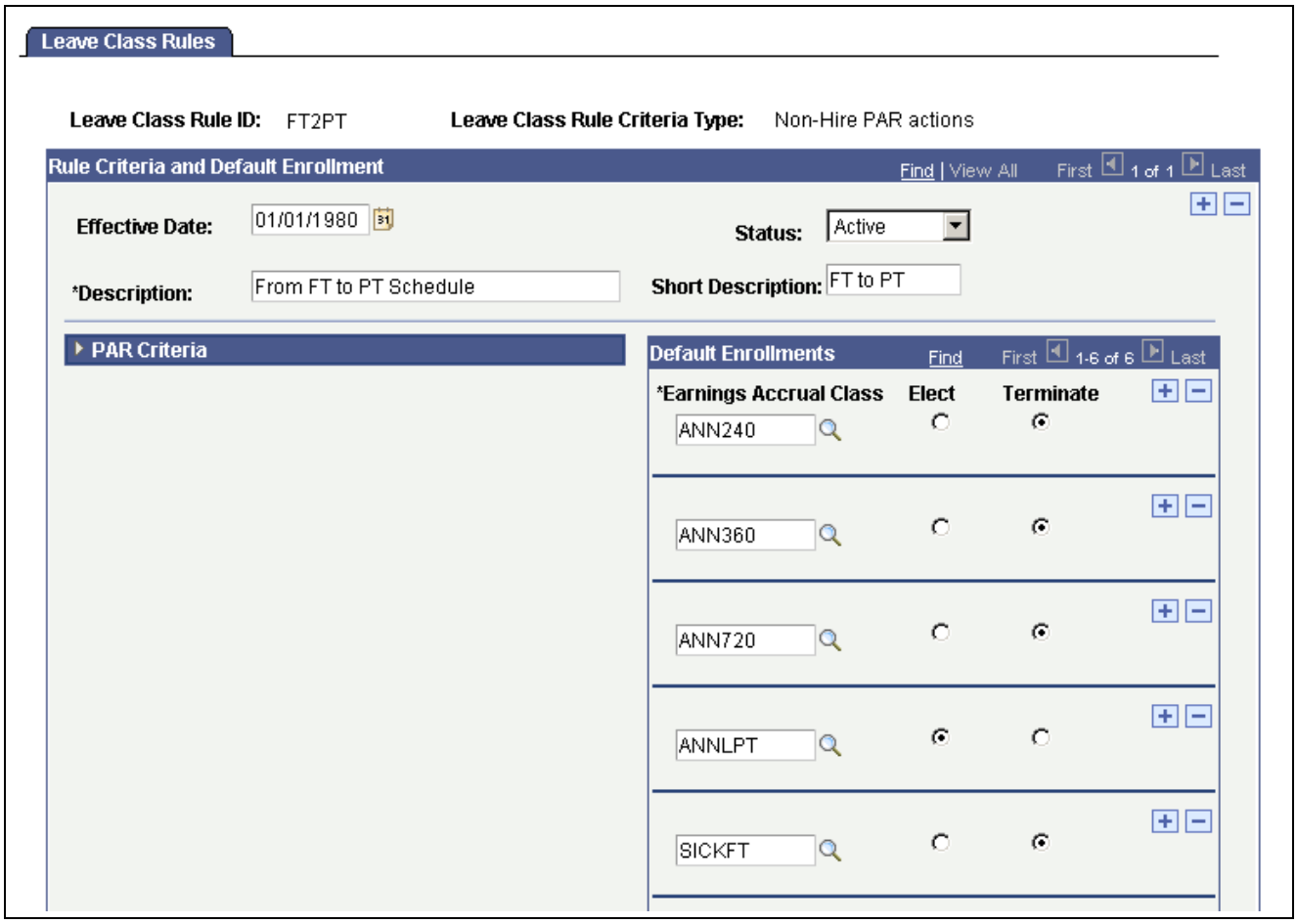
The employee meets all criteria for both rules. The Action and Work Schedule criteria are the same in both rules.

- If pay plan is ranked higher than NOA code on the Leave Class Rules template, the system uses the first rule to enroll the employee in leave classes.
- If NOA code is ranked higher than pay plan on the Leave Class Rules template, the system uses the second rule to enroll the employee in leave classes.

Setting Up Leave Class Rule Criteria

Access the Leave Class Rules page.

Copyright © 1988-2006, Oracle. All rights reserved.



Leave Class Rules page

Note. You do not need to set up a Leave Class Rule for terminating employees. The PeopleSoft Enterprise Payroll for North America Final Check Process requires that the employee stay enrolled to determine how much pay they are eligible for upon their separation. Once an employee has *Terminated* status, normal payroll calculations in PeopleSoft Enterprise Payroll for North America no longer process that employee.

Leave Class Rule ID Identify each leave class rule you create.

Leave Class Rule Criteria Type Assign a type to each new rule when you first enter the page. This value determines which additional fields are available on the page. Values are:

Hire/Rehire: for rules associated with hire or rehire actions.

Leave Program Status: for rules associated with leave bank and transfer processing.

Non-Hire PAR actions: for rules associated with PAR actions that are not hire or rehire.

The value you select in the Leave Class Rule Criteria Type field affects which group boxes appear on the page.

Copyright © 1988-2006, Oracle. All rights reserved.

Leave Class Rule Criteria Type	Group Boxes
Hire/Rehire or *Non-Hire PAR actions*	PAR Criteria Default Enrollments
Leave Program Status	Leave Program Default Enrollments

PAR Criteria

Only the criteria you selected and ranked on the Leave Class template appear in this group box. Select a value for a criterion if you want to process leave enrollment based on a designated value for that criterion under this rule. The system processes enrollments based on the value of this field in the employee's PAR transaction.

Default Enrollments

Earnings Accrual Class Select the earnings accrual classes that apply to this rule.

Elect Select to enroll employees in the earnings accrual class by this rule's criteria.

Terminate Select to terminate employees from the earnings accrual class by this rule's criteria.

Leave Program

Leave Program Type If an employee has been approved as a recipient of one of the leave transfer programs, you can define which accruals to enroll or terminate. Select the type of leave transfer program *Bank, Emergency,* or *Voluntary.*

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "(USF) Setting Up Additional U.S. Federal Payroll Functionality," Defining Earnings Accrual Classes

Chapter 20, "(USF) Managing Leave," Administering Leave Donations, page 666

Processing Auto Leave Enrollment

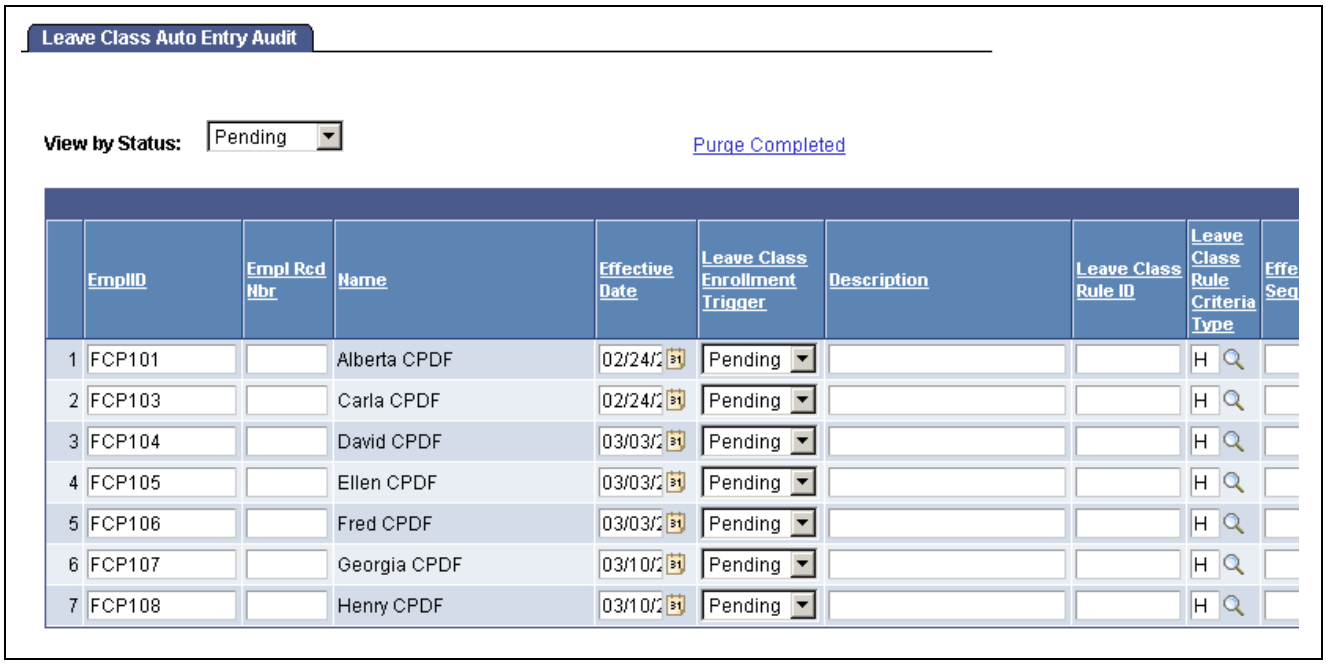
After you set up the Leave Class Rules template and the Leave Class Rule Criteria, you process any hire, PAR transaction, or leave program approval as you normally would through the Workforce Administration, Job Information menu.

When you are ready to enroll employees in earnings accrual classes, access the Automatic Leave Enrollment page. *As Of Date* is the run parameter. The Leave Class Auto Enrollment process (FGHR036) compares the PAR transactions and leave program approval against the leave class rule criteria and enrolls employees in the appropriate earnings accrual classes. You can set this process to run automatically or on demand.

Reviewing Auto Leave Enrollment

Access the Leave Class Auto Entry Audit page.

Copyright © 1988-2006, Oracle. All rights reserved.



Leave Class Auto Entry Audit page

Note. Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

Use this page to view the outcome of each transaction that was processed by the Leave Class Auto Enrollment process.

View by Status Select a value to sort the data by status (Leave Class Enrollment Trigger). Values are: *Completed, Error,* or *Pending.*

The system records employees on this table with the status of *Pending* as soon as a PAR action is completed or the employee is approved into a leave program.

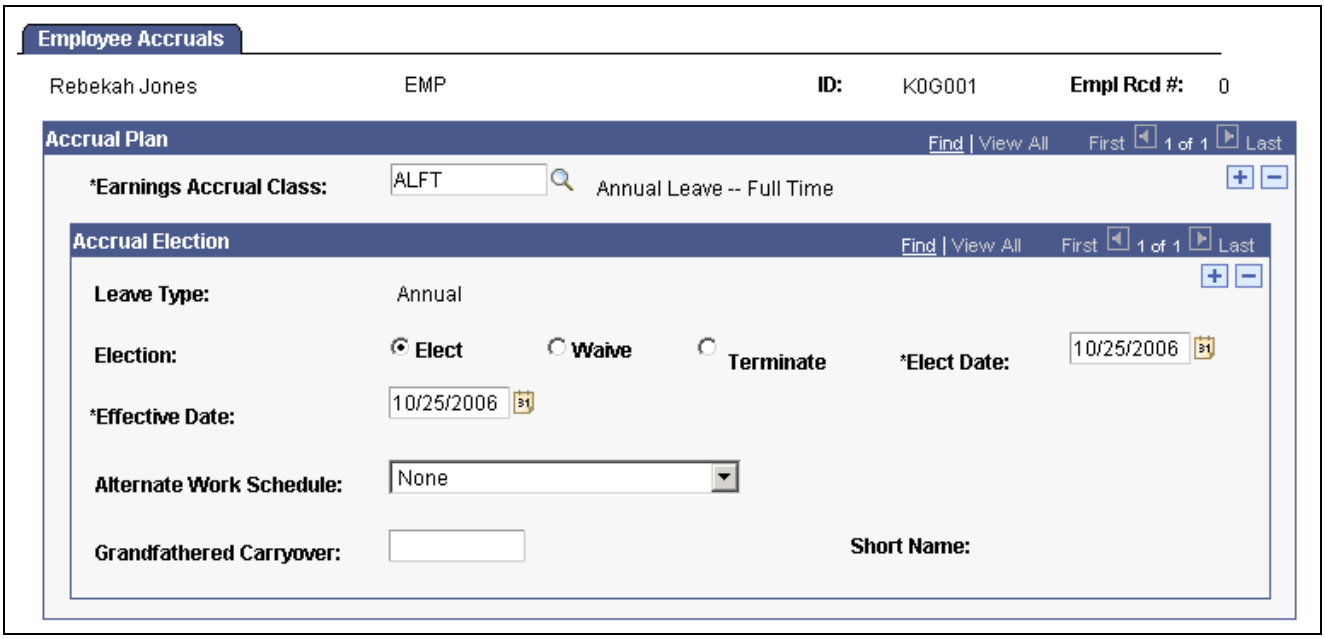
The status changes to *Completed* when the auto enrollment process is complete.

Purge Completed Click to delete all data rows with the status (Leave Class Enrollment Trigger) of *Completed.*

Manually Entering or Adjusting Leave Enrollment

Access the Employee Accruals page.

Copyright © 1988-2006, Oracle. All rights reserved.



Employee Accruals page

Accrual Plan

Earnings Accrual Class Select an earnings accruals class. The classes you created on the Earnings Accruals Class table are displayed.

Accrual Election

Leave Type The leave type defaults from the accrual calculation box on the Earnings Accruals − Class Page.

Election Select the enrollment status.

Select *Elect* to enroll the employee in a class.

Select *Waive* to waive a leave just like a regular benefit.

Select *Terminate* to end the employee's enrollment in a class.

Elect Date Enter the date on which the accrual election change occurs.

Effective Date Select a date to specify when this accrual election becomes effective and the employee will be in the new earnings accrual class.

Alternate Work Schedule The purpose of the alternate work schedule is for those employees on the Credit Leave Accrual. When the employee's work schedule changes, the system creates an additional pay record for them to pay out their current balance.

Grandfathered Carryover Enter the grandfathered carryover here, if applicable. A grandfathered carryover is when an employee has a balance greater than the new earnings accrual-ceiling amount. For example, an employee who carried an annual leave balance of 360 hours in a previous class can transfer to a new class that has a ceiling of 240 hours. The difference of 120 hours between the new ceiling amount and the current balance of 360 is called the *Grandfathered Carryover.*

Copyright © 1988-2006, Oracle. All rights reserved.

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "(USF) Setting Up Additional U.S. Federal Payroll Functionality," Defining Earnings Accrual Classes

Setting Up Leave Transfer Programs

To set up leave transfer programs, use the Denial Code (GVT_DENIAL_CD_TBL), Leave Program Type Table (GVT_LV_XFR_TYP_TBL), Leave Bank Details (GVT_LV_BANKMEM_SEC), and Emergency Leave Transfer Details (GVT_LV_DON_TGT_SEC) components.

To set up leave transfer programs, you must define the programs and the earnings codes and accrual classes used for processing.

This section discusses how to:

- Set up denial codes and denial notification letter text.
- Set up leave transfer programs.
- Set up earnings codes for leave transfer.
- Set up earnings accrual classes for leave transfer.
- Set up leave class rules for leave transfer.

Pages Used to Set Up Leave Transfers

Page Name	Object Name	Navigation	Usage
Denial Code	GVT_DENIAL_CD_TBL	Set Up HRMS, Product Related, Workforce Administration, Absence, Leave Denial Codes USF, Denial Code	Set up denial reasons and specify the text to be printed in denial notifications.
Leave Program Type Table	GVT_LV_XFR_TYP_TBL	Set Up HRMS, Product Related, Workforce Administration, Absence, Leave Program Type Table, Leave Program Type Table	Set up leave transfer programs, specify the program type, and indicate limits on donations and balances.
Leave Bank Details	GVT_LV_BANKMEM_SEC	Click the Leave Bank Details button on the Leave Program Type Table page	Enter Leave Bank board members.
Emergency Leave Transfer Details	GVT_LV_DON_TGT_SEC	Click the Emergency Leave Transfer Dtl (emergency leave transfer details) button on the Leave Program Type Table page	Enter the number of donation hours targeted.

Copyright © 1988-2006, Oracle. All rights reserved.

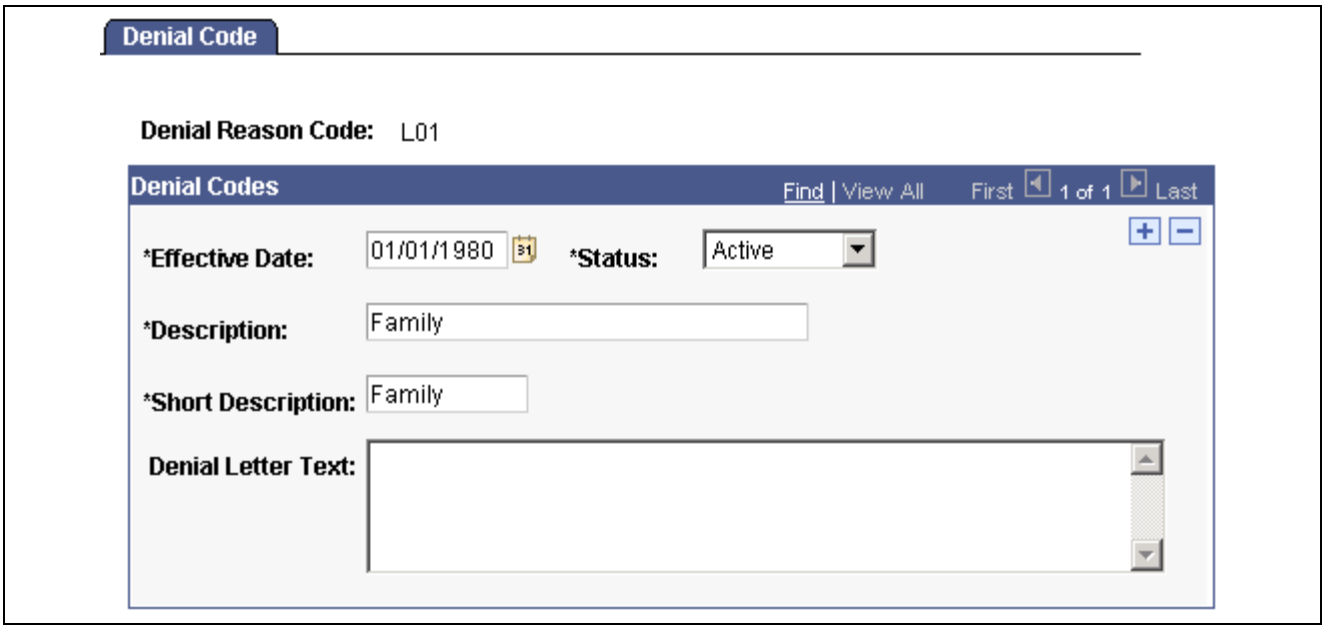
See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "(USF) Setting Up Additional U.S. Federal Payroll Functionality," Defining Earnings Accrual Classes

Chapter 20, "(USF) Managing Leave," Setting Up Leave Class Rule Criteria, page 655

Setting Up Denial Codes and Denial Notification Letter Text

Access the Denial Code page.



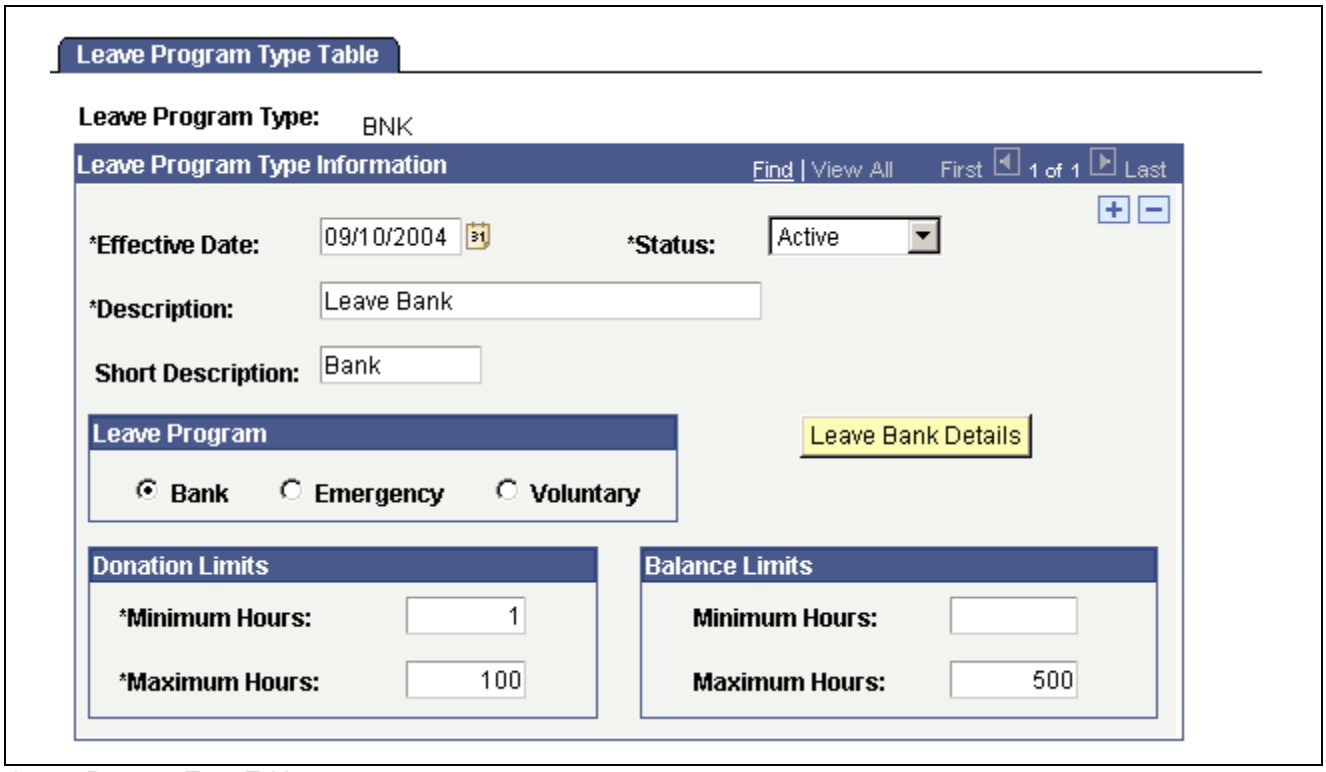
Denial Code page

Denial Letter Text Enter details of the reason for denial that you want to be printed on the Leave Denial Notifications report (FGPY031).

Setting Up Leave Transfer Programs

Access the Leave Program Type Table page.

Copyright © 1988-2006, Oracle. All rights reserved.



Leave Program Type Table page

Leave Program Type Information

Leave Program Type	Define your leave program codes.
Leave Program	Select the type of leave transfer program (Bank, Emergency, Voluntary) to associate with this Leave Program Type code.
Donation Limits and **Balance Limits**	Enter the Minimum Hours and Maximum Hours allowable for donations and balances.
Leave Bank Details	Click to access the Leave Bank Details page and enter the Leave Bank board members and indicate those who are labor representatives. If you select *Bank* in the Leave Program group box, the system adds the Leave Bank Details button to the page when you save.
Emergency Leave Transfer Dtl (emergency leave transfer details)	Click to access the Emergency Leave Transfer Details page and record the number of donation target hours. If the Leave Program Type is *Emergency,* the system adds the Emergency Leave Transfer Details button to the page when you save.

Setting Up Earnings Codes for Leave Transfer

Set up three unique earnings codes for three distinct purposes:

- For donors to donate leave to transfer programs.
- For recipients to receive (accrue) leave from transfer programs.
- For recipients to use leave accrued from transfer programs.

Copyright © 1988-2006, Oracle. All rights reserved.

Leave Earning Type

PeopleSoft provides five Leave Earning Type codes as translate values. Associate these types with earnings codes that you set up for processing leave transfers. The type code you select defines the function of the earnings code within the leave bank and transfer program. The following table summarizes the processing that is triggered by these codes.

Leave Earn Type	Leave Bank and Transfer Process	Earning Accrual Process
Donate to Bank	Updates the donor's Additional Pay page with the hours contributed to a Leave Bank Program. Use the Leave Bank Application page to enter requests. Updates Leave Bank Ledger inquiry page with hours contributed.	Donor's Annual: • Increase Hours Taken YTD • Reduce Balance YTD
Donate to Emergency	Updates the donor's Additional Pay page with the hours contributed to an Emergency Leave Transfer Program (ELTP). Use the Leave Bank Application page to enter requests. Updates the Leave Ledger with hours contributed.	Donor's Annual: • Increase Hours Taken YTD • Reduce Balance YTD
Donate to Recipient	Updates the donor's Additional Pay page with the hours contributed in the Voluntary Leave Transfer Program (VLTP). Use the Donor Contribution page to enter requests. Updates the Leave Donation Tracking page.	Donor's Annual: • Increase Hours Taken YTD • Reduce Balance YTD

Copyright © 1988-2006, Oracle. All rights reserved.

Leave Earn Type	Leave Bank and Transfer Process	Earning Accrual Process
Received from Bank	Updates the recipient's Additional Pay page with the hours received from the Bank or ELTP. Use the Leave Recipient Info page to enter requests. Updates Leave Ledgers with hours withdrawn.	Leave Program Recipient: Increase Balance YTD
Received from Donor	Updates the recipient's Additional Pay page with the hours received through the VLTP. Use the Leave Recipient Info page to enter requests.	Leave Program Recipient: Increase Balance YTD

Setting Up Earnings Codes for Donors and Recipient Accruals

Use the Earnings Table component to set up earnings codes for donors and recipient accruals. You must use the specified values for the following fields:

- General page: In the Payment Type field, select *Hours Only.* Leave transfer earnings codes process hours only; there are no earnings or deductions associated.
- Taxes page: There are no taxes taken. In the Earning Allocation group box, select *Maintain Earnings Balances.*
- Federal Additional Earnings page: In the Leave Bank and Transfer Type group box, select the appropriate Leave Earnings Type.
- Calculation Page: The Multiplication Factor must be 0.0000 to ensure no earnings.

Setting Up an Earnings Code for Recipients to Use Transferred Leave

Use the Earnings Table component to set up earnings codes for recipients to use transferred leave. You must use the specified values for the following fields:

- General page: In the Payment Type field, select *Hours Only*.
- Taxes page: The earnings are fully taxable. In the Earning Allocation group box, select Add to Gross, Maintain Earnings Balances, and Hours Only.
- Calculation Page: The Multiplication Factor must be 1.0000 to ensure the earning is paid at the regular hourly rate.

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Defining Earnings Codes and Earnings Programs"

Setting Up Earnings Accrual Classes for Leave Transfer

Set up earning accrual classes for the following purposes:

Copyright © 1988-2006, Oracle. All rights reserved.

- Leave program recipient.

  Once an employee is approved as a recipient in either a Bank, ELTP, or VLTP, they must be enrolled into an Earning Accrual Class to track hours received and used during their program participation.

- Deferred Annual/Sick Leave.

  When an employee is participating in either an Agency Bank or VLTP, they must terminate their enrollment from regular annual and sick leave plans and enroll into the deferred annual and sick earning accrual classes. The deferred programs will track service hours and entitlement to a defined maximum accrual. For example, full time employees may accrue to the maximum of 40 hours.

  Employees participating in an ELTP are not subject to the accrual limit and do not need to be enrolled into the deferred programs.

- Annual Leave.

  All donated hours are taken from the employee's annual leave accrual class. Update each of your annual accrual classes with the three donor earning codes defined with Donate to Bank, Donate to Emergency, and Donate to Recipient leave earning types.

Setting Up Earnings Accrual Classes for Leave Program Recipients

Use the Earnings Accruals component to set up earnings accrual classes for leave program recipients. You must use the specified values for the following fields:

- Class page: In the Leave Type field, select *Leave Program.*
- Balance page: The values you enter depend upon the purpose of the earnings code you're adding to the class.

  For earnings codes used to accrue recipient leave transfer, select *Add to Hours Earned.*

  For earnings codes used when recipients use transferred leave, select *Add to Service Hours* and *Add to Hours Taken.*

Setting Up Earnings Accrual Classes for Deferred Annual/Sick

Use the Earnings Accruals component to create a deferred earning accrual class for every annual and sick accrual class that has a different accrual maximum during an employee participation in the leave bank or transfer programs.

Deferred accrual classes need to mirror the accrual classes that they are replacing; the only difference in the two classes is the leave type and accrual ceiling.

For example, the Deferred Annual Accrual Class mirrors the Annual Accrual Class by having the same accrual calculation, carryover, expiration/termination, accrual rates, and balance earning codes. The only difference in the two classes is the Leave Type and Accrual Ceiling. In this example, enter the following information:

- Class page: In the Leave Type field, select *Deferred Annual.*
- Ceiling/Carryover page: Set up the accrual ceiling as desired for the deferred accrual class.

Setting Up Annual Accrual Classes for Leave Transfer Processing

All donated hours to bank and transfer programs are withdrawn from the employee's Annual Leave Accrual Class. You must update all your Annual Accrual Class Balance tables with the three earning codes you set up with the leave earnings types of Donate to Bank, Donate to Emergency, and Donate to Recipient.

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "(USF) Setting Up Additional U.S. Federal Payroll Functionality," Defining Earnings Accrual Classes

Copyright © 1988-2006, Oracle. All rights reserved.

Setting Up Leave Class Rules for Leave Transfer

Access the Leave Class Rules page.

You can define leave class rules to enroll an approved recipient automatically into the accrual class that you create to track leave program activity. Use this page to define the automatic enrollment rule for each leave program type you set up.

- Select *Leave Program Status* as the Leave Class Rules Criteria Type.
- Select the appropriate Leave Program Type.

See Also

Chapter 20, "(USF) Managing Leave," Setting Up Leave Class Rule Criteria, page 655

Administering Leave Donations

Employees may donate hours to an agency Leave Bank, ELTP, or VTLP. The contribution process is the same for the Bank and ELTP programs, where hours are donated to a common pool. However, the contribution process is different for the VLTP, where the hours are donated directly to an employee.

This section discusses how to:

- Enter employee requests to contribute leave to a Leave Bank or ELTP.
- Enter employee donations to the VLTP.
- Enter employee requests to donate to another agency's leave transfer program.
- Run the Leave Bank and Transfer process.

 Copyright © 1988-2006, Oracle. All rights reserved.

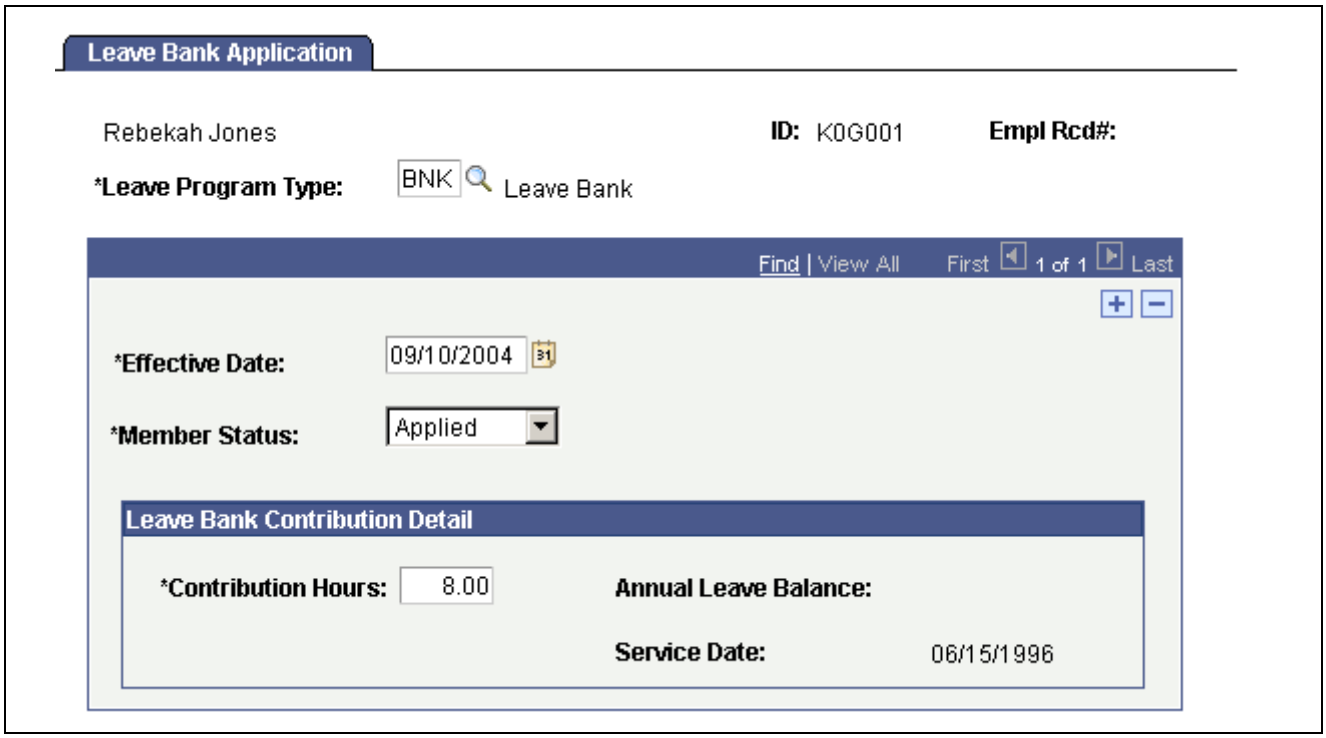
Pages Used to Administer Leave Donations

Page Name	Object Name	Navigation	Usage
Leave Bank Application	GVT_LV_BANK_APP	Workforce Administration, Leave Administration USF, Reports, Leave Bank Application/Donate, Leave Bank Application	Enter employee requests to contribute leave to a Leave Bank or ELTP.
Donor Contribution	GVT_LV_DON_CONTRIB	Workforce Administration, Leave Administration USF, Manage Leave Information, Voluntary Donations, Donor Contribution	Enter employee donations to the VLTP.
External Leave Donations	GVT_LV_DON_EXT	Workforce Administration, Leave Administration USF, Manage Leave Information, External Leave Donations, External Leave Donations	Enter employee requests to donate to another agency's leave transfer program.
Process Leave Bank / Transfer	RUNCTL_FGPY022	Workforce Administration, Leave Administration USF, Manage Leave Information, Request Leave Bank/Transfers, Process Leave Bank / Transfer	Run the Leave Bank and Transfer process to process donations and update accruals, additional pay, and leave ledgers.

Entering Employee Requests To Contribute Leave To A Leave Bank Or Emergency Leave Transfer Program

Access the Leave Bank Application page.

Copyright © 1988-2006, Oracle. All rights reserved.



Leave Bank Application page

Leave Program Type Select the leave program type to which the employee is donating. Valid values are the Leave Program Types you set up for Bank and Emergency leave programs.

Effective Date The request date of the application.

Member Status Select or view the member status of the leave request. Values are:

Applied: The Leave Bank Board has not processed the request and no annual leave contributions have been taken from the employee's current Earnings Accrual Class balance.

Approved: The leave review board has approved the donor's leave request. The system processes only *Approved* requests.

Contribute: The system processes the hours during the next payroll cycle and updates the hours on the employee's additional pay to reduce the balance by the donation hours on the application. Only the system can update the applicant's request to *Contribute*; it issues an error message if you select this value.

Cancelled: Indicates any other reason that the request is terminated.

Denied: The Leave Bank Board has evaluated the request and denied the donor's leave request.

Denial Reason 1 and **Denial Reason 2** These fields appear if you select Denied as the Member Status. You must provide the applicant with at least one reason for denial.

Contribution Hours Specify the number of hours the donor is contributing to the leave bank or ELTP.

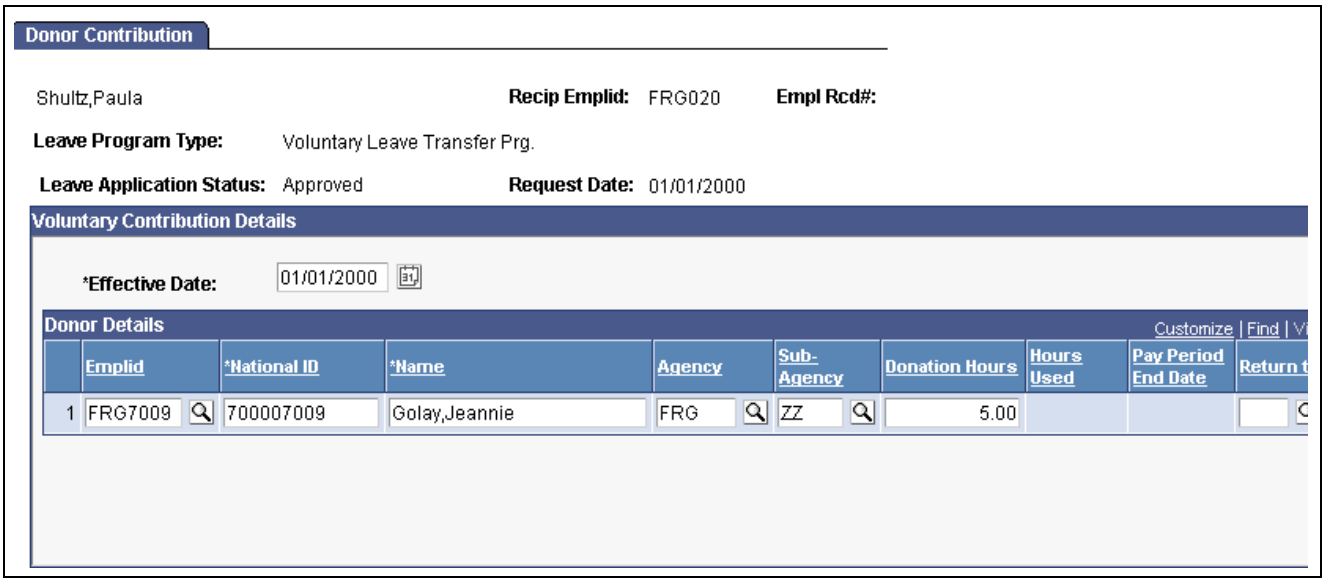
Annual Leave Balance Displays the number of hours of annual leave the employee has as of this request date (Effective Date).

Copyright © 1988-2006, Oracle. All rights reserved.

Service Date The basis for determining the length of service, on which the required contribution minimum is based.

Entering Employee Donations to Voluntary Leave Transfer Program

Access the Donor Contribution page.



Donor Contribution page

Note. Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

Recipient information is displayed at the top of the page.

Effective Date The date of the donation.

Donor Details

In this group box, enter the donor information. The system enters the pay period in which the donation was processed. Donations are not processed until the recipient's application is approved.

The Return to, Returned Processed, and Pay Period Return Date assist you in recording your manual leave donation return process. If an employee has donated leave, and it is not needed, it may be returned to the donor.

Return to Acknowledges the donor's choice for the disposition of where the leave should be returned in the case that any unused leave is returned. Valid values are *Donor* or *Bank*. This field is informational only and used to track the return of excess leave donation hours.

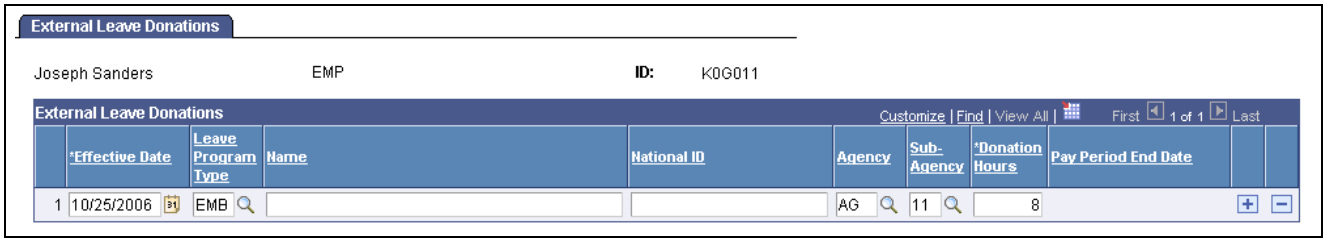
Returned Processed When a leave recipient has excess leave when their emergency is over, select this check box when the leave amount to be returned is restored to the Donor. This field is informational only and used to track the return of excess leave donation hours.

Pay Period Return Date Enter the date the leave is restored to the donor. The field is informational only and used to track the return of excess leave donation hours.

Copyright © 1988-2006, Oracle. All rights reserved.

Entering Employee Requests To Donate To Another Agency's Leave Transfer Program

Access the External Leave Donations page.



External Leave Donations page

Note. Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

Record the details of donations made by an employee in your agency to another agency's leave transfer program. The system updates the donor's accrual balances when you run the Leave Bank / Transfer process.

Running the Leave Bank and Transfer Process

Access the Process Leave Bank / Transfer page.

Run the Leave Bank and Transfer process (FGPY022) after employees have donated hours. The process loads the Additional Pay page and applies the donation amount to the Leave Ledgers. The process can be run multiple times and should be run prior to your payroll cycle.

The system processes all employee leave bank applications with Member Status *Approved* and an effective date equal to or before the As of Date you enter on the run control page.

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Maintaining Payroll Data," Entering Additional Pay Earnings Information

Chapter 20, "(USF) Managing Leave," Running the Leave Bank and Transfer Process for Approved Recipients, page 672

Administering Leave Recipients

Employees may receive hours from a Bank, ELTP or VTLP. The process to receive hours from all leave program types is the same.

This section discusses how to:

1. Enter employee requests to receive hours from any of the leave program types.
2. Enroll recipients in the leave program accrual class.
3. Run the Leave Bank and Transfer process for approved recipients.
4. View and adjust the data entered by the Leave Bank and Transfer process.

Copyright © 1988-2006, Oracle. All rights reserved.

5. View recipient accrual balances.

Page Used to Administer Leave Recipients

Page Name	Object Name	Navigation	Usage
Leave Recipient Info (leave recipient information)	GVT_LV_RECIP_INFO	Workforce Administration, Leave Administration USF, Manage Leave Information, Create Leave Recipient App, Leave Recipient Info	Enter employee requests to receive hours from any of the leave program types.

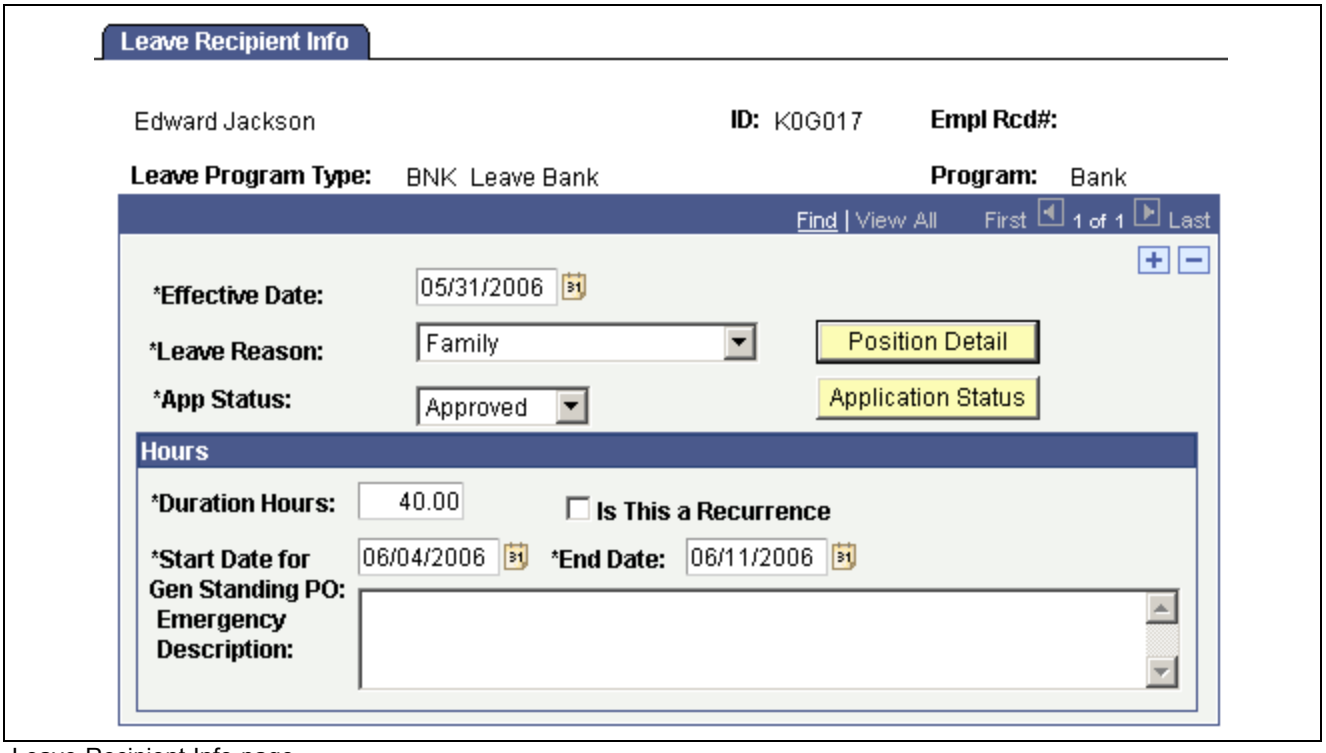
See Also

Chapter 20, "(USF) Managing Leave," Manually Entering or Adjusting Leave Enrollment, page 658

Chapter 20, "(USF) Managing Leave," Pages Used to Administer Leave Donations, page 667

Enter Employee Requests to Receive Hours From Any of the Leave Program Types

Access the Leave Recipient Info page.



Leave Recipient Info page

Effective Date Enter the date that leave program participation was requested.

Leave Reason Select the reason for the emergency leave requested. Values are *Employee, Family,* and *Agency.*

Copyright © 1988-2006, Oracle. All rights reserved.

App Status (application status) Select the status from the following values:

Pending: The leave review board has not processed the request.

Approved: The leave review board has approved the request.

Denied: The leave review board has denied the request.

Separated: The employee separated from Federal service before the originally requested end date.

Cancelled: Any other reason that the request is not active.

Position Detail Click to view the position number, pay plan, grade, and step of the potential leave recipient as of the request date. Standard hours and tour of duty are used to validate the minimum number of absence hours.

Application Status Click to identify the approver and the status Date. If the Leave Recipient Application has a status of Denied, then you may enter up to two. You must enter at least one denial reason. These codes are used later when generating Leave Recipient Denial letters.

Hours

Duration Hours Enter the number of hours requested (to the quarter-hour).

Is This a Recurrence Select if the reason is a recurrence.

Start Date for Gen Standing PO: and **End Date** Enter the days on which the recipient requests the leave to begin and end.

Emergency Description Detail the reasons for needing transferred leave, including a brief description of the nature and severity of the emergency.

Enrolling Recipients in the Leave Program Accrual Class

While receiving hours from a leave program, the recipient must be enrolled in the leave program accrual class to record hours donated and used.

If the program is either a Bank or VLTP, terminate enrollment from their regular and sick earnings accrual classes using the Employee Accruals page. Then enroll the recipient into the deferred accrual classes to track accruals during the program participation and enforce the maximum entitlement.

If there is an auto enrollment leave class rule set up for the leave programs, then once the approved request is saved, the application opens the employee's Employee Accruals page and inserts the earning accrual defined in the class rule. While in the page, you may terminate the annual and sick and enroll the employee in the deferred annual and sick accrual classes.

See Also

Chapter 20, "(USF) Managing Leave," Manually Entering or Adjusting Leave Enrollment, page 658

Running the Leave Bank and Transfer Process for Approved Recipients

Access the Process Leave Bank / Transfer page.

The Leave Bank & Transfer process (FGPY022) processes *Approved* recipients.

 Copyright © 1988-2006, Oracle. All rights reserved.

If the employee is participating in a Bank or ELTP, the process:

- Updates the recipient's Additional Pay page with the earnings code defined on the Earnings Code Table with *Received from Bank* as the Leave Earning Type.
- Updates the Leave Ledger with hours withdrawn.
- If the employee is participating in a VLTP, the process updates the recipient's Additional Pay page with earnings code defined on the Earnings Code Table with *Received from Donor* as the Leave Earning Type.

Viewing the Data Entered by the Leave Bank and Transfer Process

See Chapter 20, "(USF) Managing Leave," Viewing Leave Donations to Leave Bank and Emergency Leave Transfer Programs, page 674.

Viewing Recipient Accrual Balances

See Chapter 20, "(USF) Managing Leave," Viewing Donor and Recipient Accrual Summaries, page 675.

Viewing Leave Transfer Data

After you run the Leave Bank / Transfer process, you can view leave transfer data.

This section discusses how to:

- View leave donations to leave bank and emergency leave transfer programs.
- View leave donations to voluntary leave transfer programs.
- View donor and recipient accrual summaries.
- View donor contributions or hours received by recipients.
- View a summary of participation in a leave transfer program.

Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to View Leave Transfer Data

Page Name	Object Name	Navigation	Usage
Leave Ledger	GVT_LV_BANK_LDGR	Workforce Administration, Leave Administration USF, Manage Leave Information, Review Leave Bank Ledger, Leave Ledger	View and adjust leave donations to leave bank and emergency leave transfer programs.
Leave Donation Tracking	GVT_LV_DON_TRACK	Workforce Administration, Leave Administration USF, Manage Leave Information, Track Leave Donation, Leave Donation Tracking	View leave donations to voluntary leave transfer programs.
Leave Program Summary	GVT_LV_PRGM_SUMM	Workforce Administration, Leave Administration USF, Manage Leave Information, Review Leave Program Summary, Leave Program Summary	View a summary of participation in a leave transfer program.

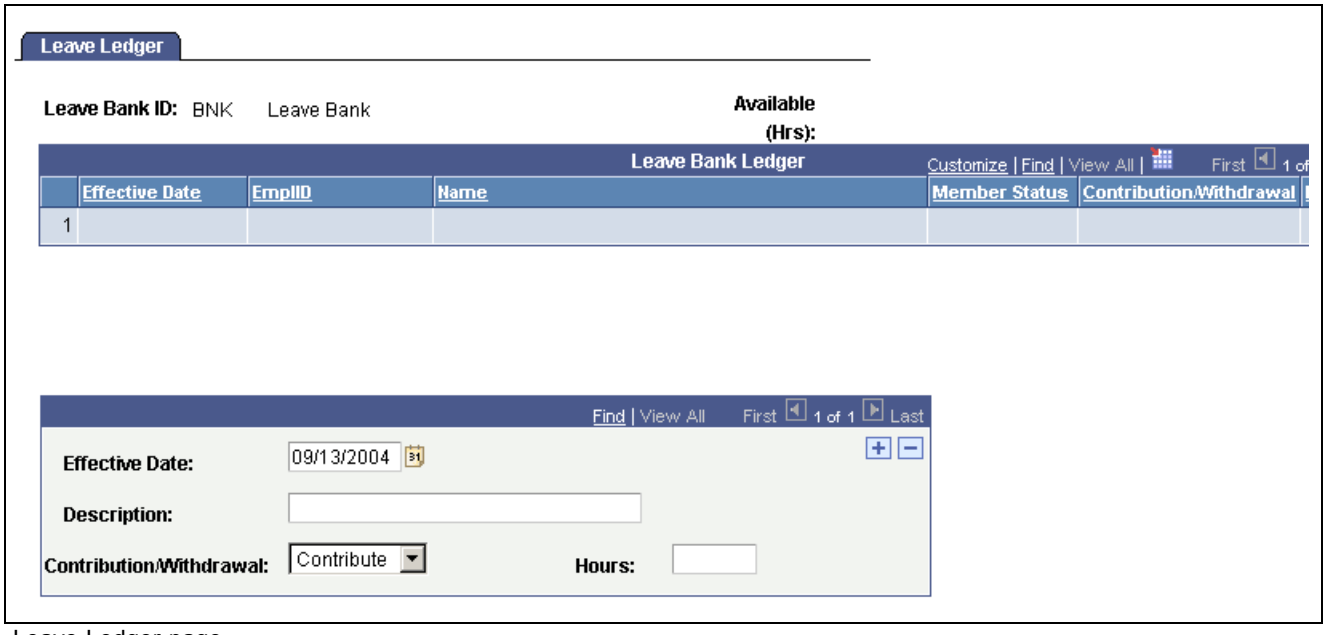
See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Maintaining Payroll Data," Entering Additional Pay Earnings Information

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Reviewing, Adjusting, and Deleting Employee Balances," (USF) Reviewing and Adjusting Leave Accrual Balances

Viewing Leave Donations to Leave Bank and Emergency Leave Transfer Programs

Access the Leave Ledger page.



Leave Ledger page

Copyright © 1988-2006, Oracle. All rights reserved.

The Leave Ledger tracks the activity within the Bank and ELTP leave programs. The Leave Bank and Transfer process updates the ledgers with the transactions it has processed.

Available (Hrs) Displays the total number of hours available in the bank or ELTP. The system updates this value when you adjust the Contribution/Withdrawal and Hours fields.

Leave Bank Ledger

Effective Date Displays the As Of Date on the Leave Bank / Transfer process run control page.

EmplID and **Name** List of all the employees who have participated in the bank.

Member Status Displays the member status for the transfer.

Contribution/Withdrawal Indicates whether each transaction is a contribution or a withdrawal.

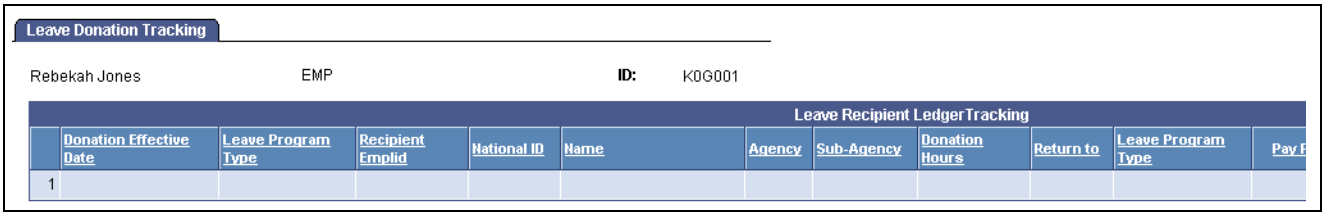
Hours Displays the number of hours contributed or withdrawn in each transaction.

Agency Ledger Adjustments

To adjust the hours, enter the effective date, the reason for the adjustment, and the hours to add or subtract. The system updates the Available Hours balance at the top of the page.

Viewing Leave Donations to Voluntary Leave Transfer Programs

Access the Leave Donation Tracking page.



Leave Donation Tracking page

Note. Not all page elements are visible on this page. Depending on the page arrangement, you see additional elements by scrolling either vertically or horizontally.

The Leave Donation Tracking page tracks the activity within the VLTP program. The Leave Bank & Transfer process updates this page with the transactions it has processed.

The page lists the donor's contributions by effective date and recipient.

Viewing Donor and Recipient Accrual Summaries

View donor and recipient accrual balances on the Accrual Summary page after payroll is processed and leave accruals are run.

- Donors: The fields Hours Taken Year-to-Date and Hours Balance Year-to-Date are updated with the hours contributed.
- Recipients: Leave program earning accrual is updated with the hours received. When the recipient uses hours, the Hours Taken Year-to-Date and Service Hours YTD are updated.

Copyright © 1988-2006, Oracle. All rights reserved.

- Recipients who terminate regular and sick accrual classes and enroll in deferred accrual classes: The deferred accrual class is updated with the pay period's Service Hours YTD, Hours Earned Year-to-Date, and Hours Balance Year-to-Date.

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Reviewing, Adjusting, and Deleting Employee Balances," (USF) Reviewing and Adjusting Leave Accrual Balances

Viewing Donor Contributions or Hours Received by Recipients

The Leave Bank and Transfer process inserts a row in the Additional Pay page for hours donated or received. The new row contains donor contribution or hours received information in the following fields.

Earnings Code The earnings code associated with the appropriate Leave Earn Type.

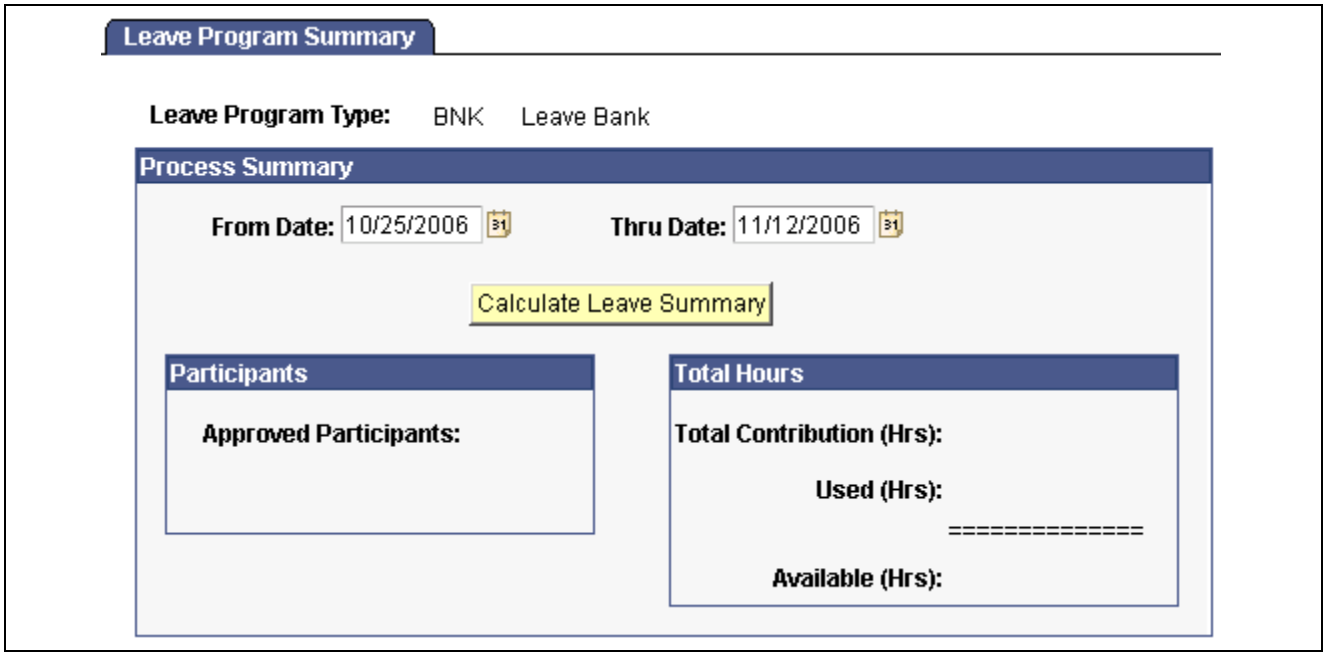
Effective Date The As Of Date on the Leave Bank / Transfer page.

Earnings End Date The end date of the pay period in which the effective date falls.

Hours The hours donated or received.

Viewing a Summary of Participation in a Leave Transfer Program

Access the Leave Program Summary page.



Leave Program Summary page

From Date and **Thru Date** Define the time period for which you want to see a summary.

Calculate Leave Summary Click after entering the date range. The system displays summary information.

Participants The system displays the number of approved participants and denied participants.

Copyright © 1988-2006, Oracle. All rights reserved.

Total Hours The system displays the total number of hours contributed, the total number of hours used, and the number of hours available for use (derived from the contribution hours and used hours).

Reporting on Leave Transfer Programs

PeopleSoft provides the following leave transfer reports:

- FGPY028 − Leave Acceptance Notifications.
- FGPY029 − Leave Bank Participants (required by OPM).
- FGPY030 − Leave Transfer Participants (required by OPM).
- FGPY031 − Leave Denial Notifications.

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "PeopleSoft Enterprise Payroll for North America Reports"

Copyright © 1988-2006, Oracle. All rights reserved.

 Copyright © 1988-2006, Oracle. All rights reserved.

CHAPTER 21

(USF) National Finance Center Processing

This chapter provides an overview of National Finance Center (NFC) processing and discusses how to:

- Set up NFC document types supported by PeopleSoft Enterprise.
- Set up NFC SINQ (Suspense Inquiry and Correction System) Import process parameters.
- Run the NFC SINQ Import process.
- Administer SINQs.
- Work with SINQ assignments.

Understanding NFC Processing

The NFC processes payroll for the majority of U.S. civilian federal government employees. This population consists of approximately 600,000 individuals. Consequently, the NFC and its federal customers generate a high volume of human resources transactions each day. The NFC SINQ Import process enables you to upload the daily SINQ transaction file from NFC. Positions, job codes and personnel actions are identified and marked as SINQed (for example, failed). The last operator (OPRID) who updated the SINQ row is notified to correct transactions in the PeopleSoft Human Resources system.

Additionally, the NFC SINQ Import process:

- Automates the assignment of errors to human resources personnel in your agency.
- Enables human resource personnel to view and change transaction status.

Common Elements Used in this Chapter

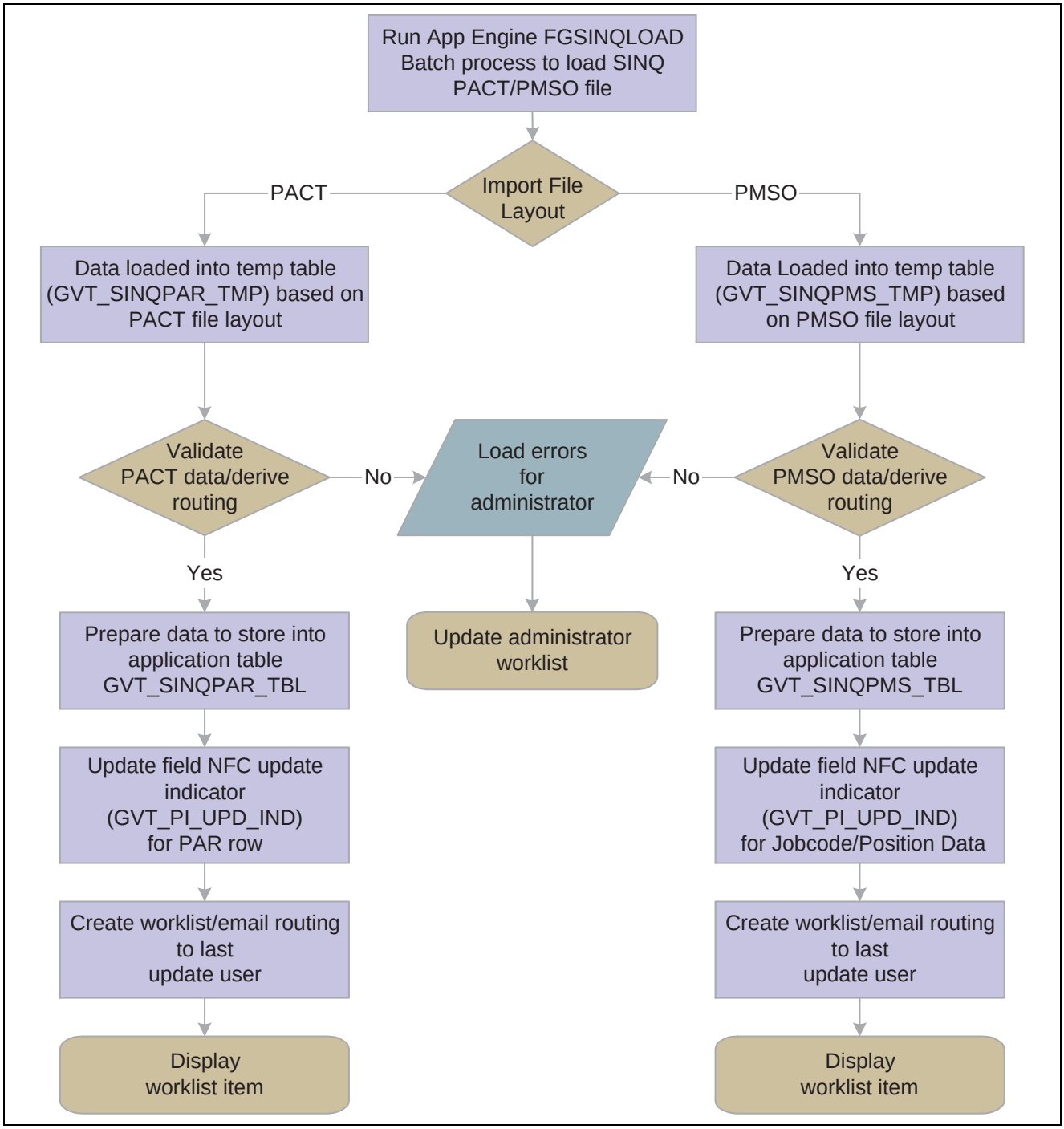
National Finance Center (NFC)	Part of the U.S. Department of Agriculture that provides payroll services to more than 600,000 federal employees.
Personnel Action Processing System (PACT)	NFC's online system for entering personnel actions into the payroll and personnel databases.
Personnel Management System (PMSO)	NFC's online system used for creating, editing, inactivating, reactivating or deleting individual (position) and master (jobcode) data. Position data must be entered into PMSO before personnel data can be entered into PACT.
Personnel Edit Subsytem (PINE)	NFC's system that combines PACT and PMSO data and processes edits against the submitted personnel and position transactions. PACT and PMSO transactions must pass PINE edits before they are processed through NFC's Personnel Processing System (PEPL) to update the Payroll/Personnel System database (PPS). PINE processes Monday through Friday of each week, and the first Saturday of the pay period.

Copyright © 1988-2006, Oracle. All rights reserved.

Suspense Inquiry and Correction System (SINQ). Position (PMSO) and personnel (PACT) transactions that do not pass PINE edits are placed in the this system.

Understanding the Process Flow for the SINQ Import Process

This diagram shows the process flow for the SINQ Import process:



Process Flow for the SINQ Import Process

This table describes the NFC PACT import file layout supported by the SINQ import process. A sample import file, fgnfcpinesinq.dat, is delivered under your product data directory.

Copyright © 1988-2006, Oracle. All rights reserved.

Field Name	Start Position	Length	Field Type	Description
ERR_SSN_NO	1	9	Char	Employee SSN (no dashes)
ERR_SUBAGENCY	10	2	Char	NFC agency (sub) code (that is, 70, 71)
ERR_POI	12	4	Char	Agency Personnel Office Identifier
ERR_COMPANY	16	2	Char	Company Cd
ERR_DOC_TYPE	18	3	Char	NFC doc type (action)
ERR_PAY_PERIOD	21	2	Char	Pay period that action was processed in.
ERR_AUTH_DATE	23	6	Num	Date action was authorized
GVT_STATUS_ TYPE	29	3	Char	NFC nature of action code (denotes correction or cancellation of action) CAN = 001 , COR = 002
GVT_NOA_CODE	32	3	Char	NFC nature of action code (type of action)
ERR_EFFDT	35	6	Num	Date action was effective (month)
ERR_BATCH_NO	41	4	Char	NFC batch processing identifier
ERR_OPER_CODE	45	7	Char	HR specialist (id) submitting the action
ERR_CODE	52	3	Char	NFC error code
ERR_MSG	55	50	Char	NFC error message

This table describes the NFC PMSO import file layout supported by the SINQ import process. A sample import file, fgnfcpmsosinq.dat, is delivered under your product data directory.

Field Name	Start Posn	Length	Field Type	Description
SUSP_OPER_CD	1	7	Char	HR specialist (id) submitting the action
SUSP_MAST_INDV	8	4	Char	“MSTR" if job code action / "INDV" if position action

Copyright © 1988-2006, Oracle. All rights reserved.

Field Name	Start Posn	Length	Field Type	Description
SUSP_FUNCTION_CD	12	10	Char	Type of action performed (for example,. CHANGE, ADD, and so forth)
SUSP_COMPANY	22	2	Char	Company Cd
SUSP_SUBAGCY	24	2	Char	NFC agency (sub) code (for example, 70, 71, and so forth)
SUSP_POI	26	4	Char	Agency Personnel Office Identifier Example: POI 1536 for Smithsonian
SUSP_JOBCODE	30	6	Num	Jobcode
SUSP_GRADE	36	2	Num	Pay grade level of position/job code
SUSP_POSITION_NBR	38	8	Num	Position Number
SUSP_INCUM-SSN	46	9	Char	SSN of current or last employee holding position
SUSP_OBLIG-SSN	55	9	Char	SSN of new hire employee filling position
SUSP_PAY_PERIOD	64	2	Num	Pay period that action was processed in
SUSP_PASS_NUM	66	2	Num	NFC processing sequence within pay period (1, 2, 3, and so forth)
SUSP_ERR_CD	68	3	Num	NFC error code
SUSP_ERR_MSG	71	50	Char	NFC error message
SUSP_ELEM_NAME_NUM	121	3	Char	NFC element number (record field location) where error detected

Copyright © 1988-2006, Oracle. All rights reserved.

Field Name	Start Posn	Length	Field Type	Description
SUSP_ELEM_ NAME	124	30	Char	NFC element name (record field location) where error detected
SUSP_DATA_FIELD	154	8	Char	NFC element content (field value) where error detected

Supported Document Types

PeopleSoft delivers and supports four document types that correspond to the types of data imported during the SINQ Import process. The delivered document types are listed in this table:

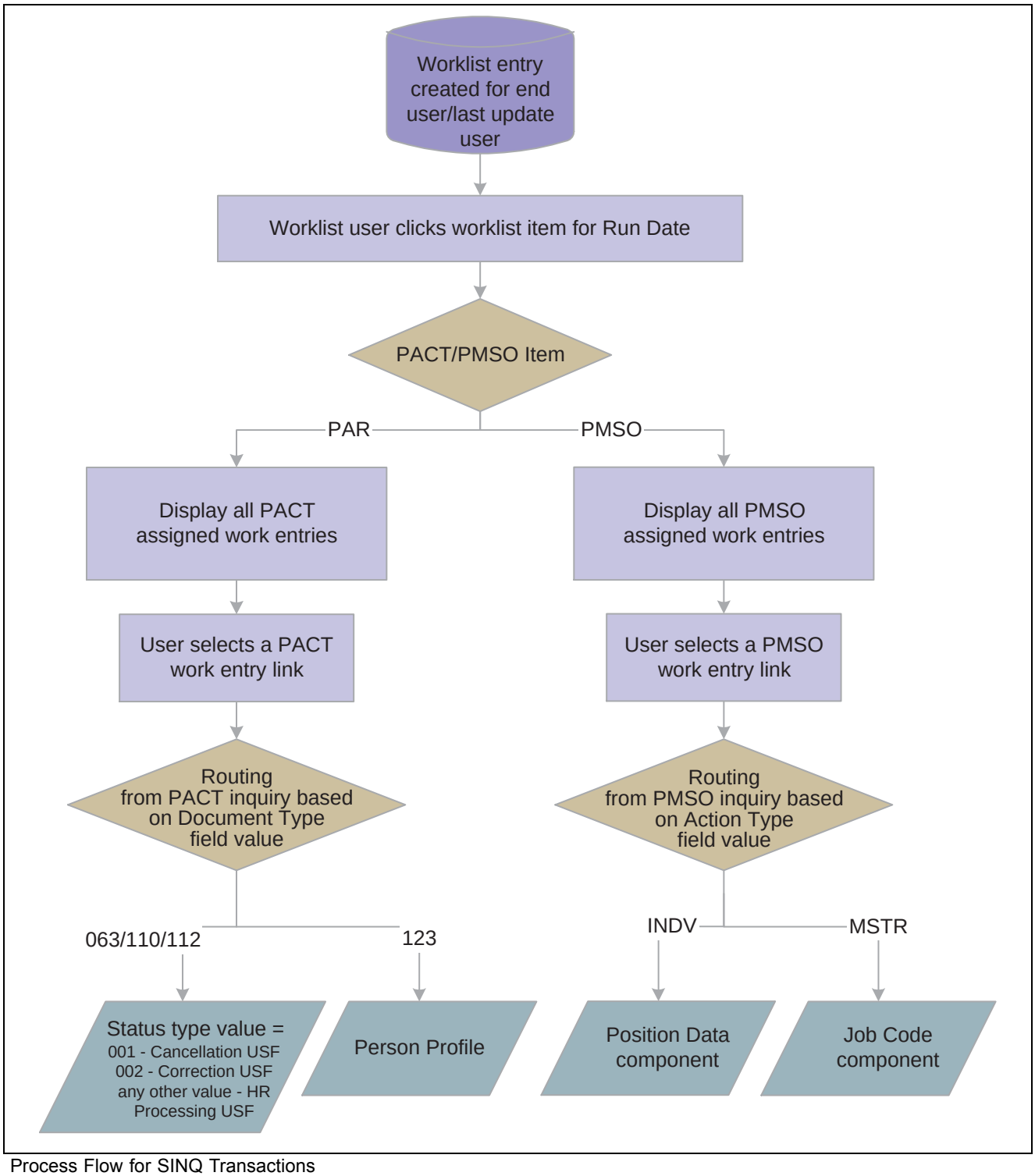
NFC Document Type	Description
063	Personnel Action
110	Award
112	Cash Award
123	Education

System administrators can filter any of these NFC document types when they run the SINQ Import process.

Understanding the Process Flow for SINQ Transactions

The SINQ Import process generates a worklist entry and an email message.

Copyright © 1988-2006, Oracle. All rights reserved.



Process Flow for SINQ Transactions

When a user selects an assigned work entry for a PACT SINQ row , the page that is displayed depends on the NFC document type and the status type values. If the NFC document type is 063 (Personnel action), 110 (Award action) or 112 (Education), the pages that are displayed are:

- If the Status type value equals 001, the Cancel Personnel Action USF (EE_CANCELLATION) component is displayed.

Copyright © 1988-2006, Oracle. All rights reserved.

- If the Status type value equals 002, the Correct Personnel Action USF (EE_CORRECTION) component is displayed.
- If the Status type value equals blank or any other value, HR Processing USF (EE_HR_PROC) component is displayed.

See Chapter 17, "(USF) Administering Personnel Action Requests," page 601.

If the NFC document type is 123, the Person Profile component is displayed.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles*, "Managing Profiles," Creating and Updating Person Profiles.

When a user select an assigned work entry for a PMSO SINQ row:

- If Action type field value is INDV, the Position Data component is displayed.
- If Action type field value is MSTR, the Job Code component is displayed.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up Jobs".

Setting Up NFC Document Types

To set up NFC document types, use the NFC Import Document Types (GVT_NFC_DOC_TYPE) component.

This section discusses how to set up NFC document types.

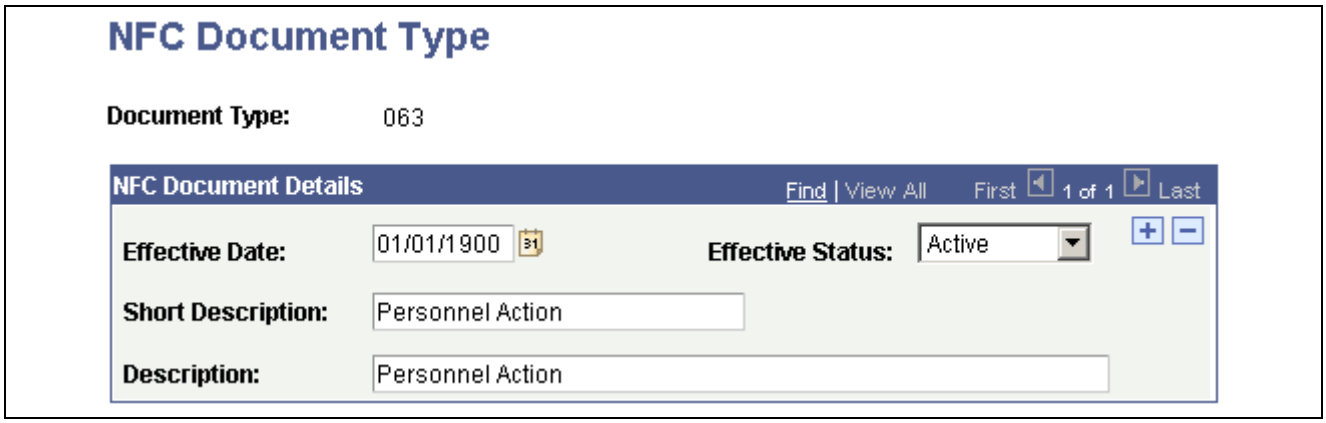
Page Used to Set Up NFC Document Types

Page Name	Object Name	Navigation	Usage
NFC Document Type	GVT_NFC_DOC_TYPE	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, NFC Import Document Types, NFC Document Type	Setup component for NFC document types.

Setting Up NFC Document Types

Access the NFC Document Type page.

Copyright © 1988-2006, Oracle. All rights reserved.



NFC Document Type page

The four NFC document types that are supported by the SINQ import process are delivered by PeopleSoft. They are described in this table:

NFC Document Type	Description
063	Personnel Action
110	Award
112	Cash Award
123	Education

Setting Up NFC SINQ Import Process Parameters

To define NFC SINQ import process parameters, use the NFC Import Process Parameters (GVT_NFC_DOC_LIST) component.

This section discusses how to set up process parameter lists that are used by the NFC SINQ Import process run control page:

- Define SINQ Import Document lists.
- Define System User IDs that need special processing.

Copyright © 1988-2006, Oracle. All rights reserved.

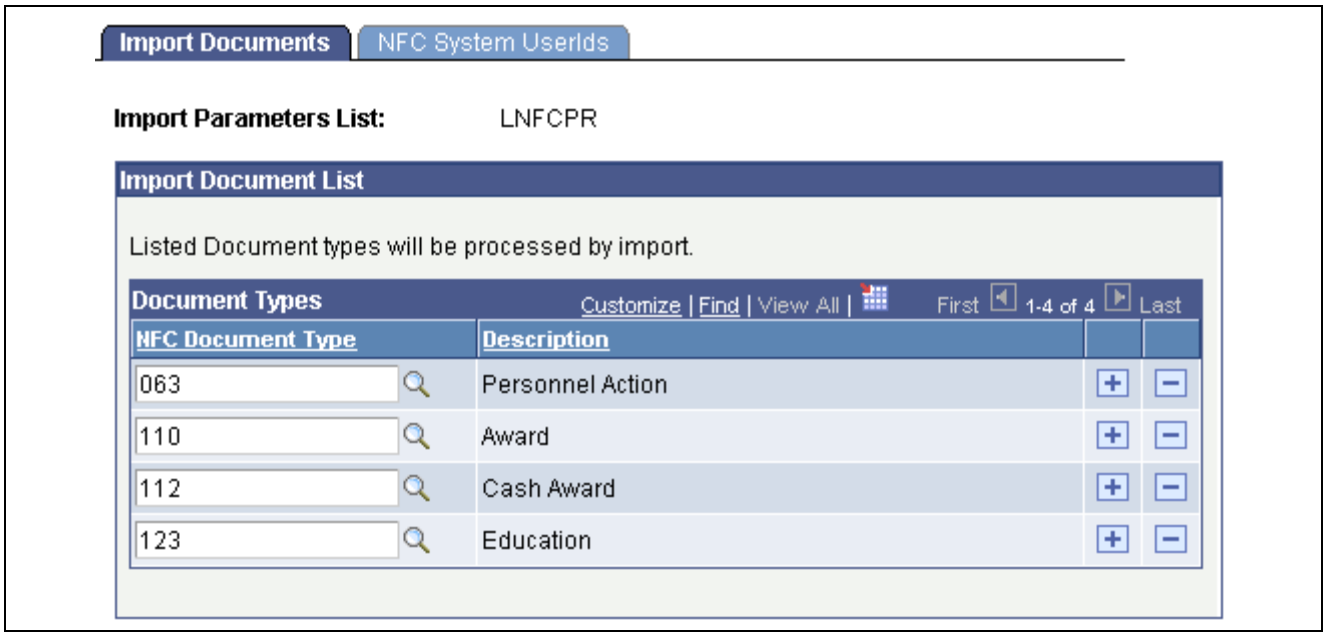
Pages Used to Set Up NFC SINQ Import Process Parameters

Page Name	Object Name	Navigation	Usage
Import Documents	GVT_NFC_DOC_LIST	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, NFC Import Process Parameters, Import Documents	Set up NFC document types that will be processed by the PACT SINQ import. This field corresponds to ERR_DOC_TYPE (position 18) on the PACT import file. See Chapter 21, "(USF) National Finance Center Processing," Understanding the Process Flow for the SINQ Import Process, page 680.
NFC System UserIds	GVT_NFC_OPR_LIST	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, NFC Import Process Parameters, NFC System UserIds	Enter UserIDs that the system will ignore during the SINQ Import process. The system uses *like* logic to make the comparison. This field corresponds to ERR_OPER_CODE (position 45) on the PACT import file. See Chapter 21, "(USF) National Finance Center Processing," Understanding the Process Flow for the SINQ Import Process, page 680.

Defining NFC SINQ Import Documents to Process from the PACT Import File

Access the Import Documents page.

Copyright © 1988-2006, Oracle. All rights reserved.



Import Documents page

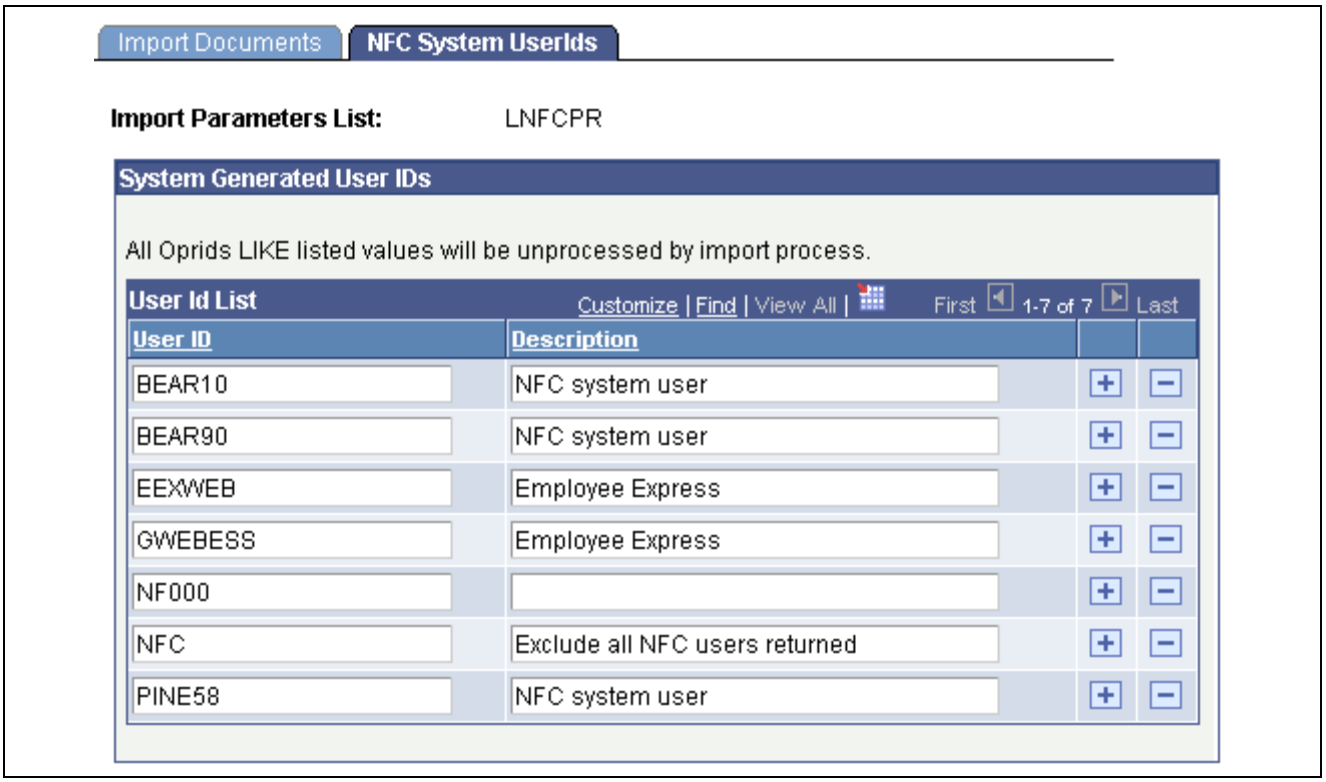
Use this page to create lists containing different NFC PACT transactions to import during the SINQ Import process.

Note. You can easily add and delete rows from an Import Document List for a single SINQ Import process run using the View Import Parameters List link on the NFC SINQ Import page.

Defining System User IDs on the PACT File that Need Special Processing by the Import Process

Access the NFC System UserIds page.

Copyright © 1988-2006, Oracle. All rights reserved.



NFC System UserIds page

Enter User IDs that are from other systems that the SINQ Import process should ignore. The system performs the comparison based on *like* comparison logic.

Running the NFC SINQ Import Process

This section discusses how to run the NFC SINQ Import process.

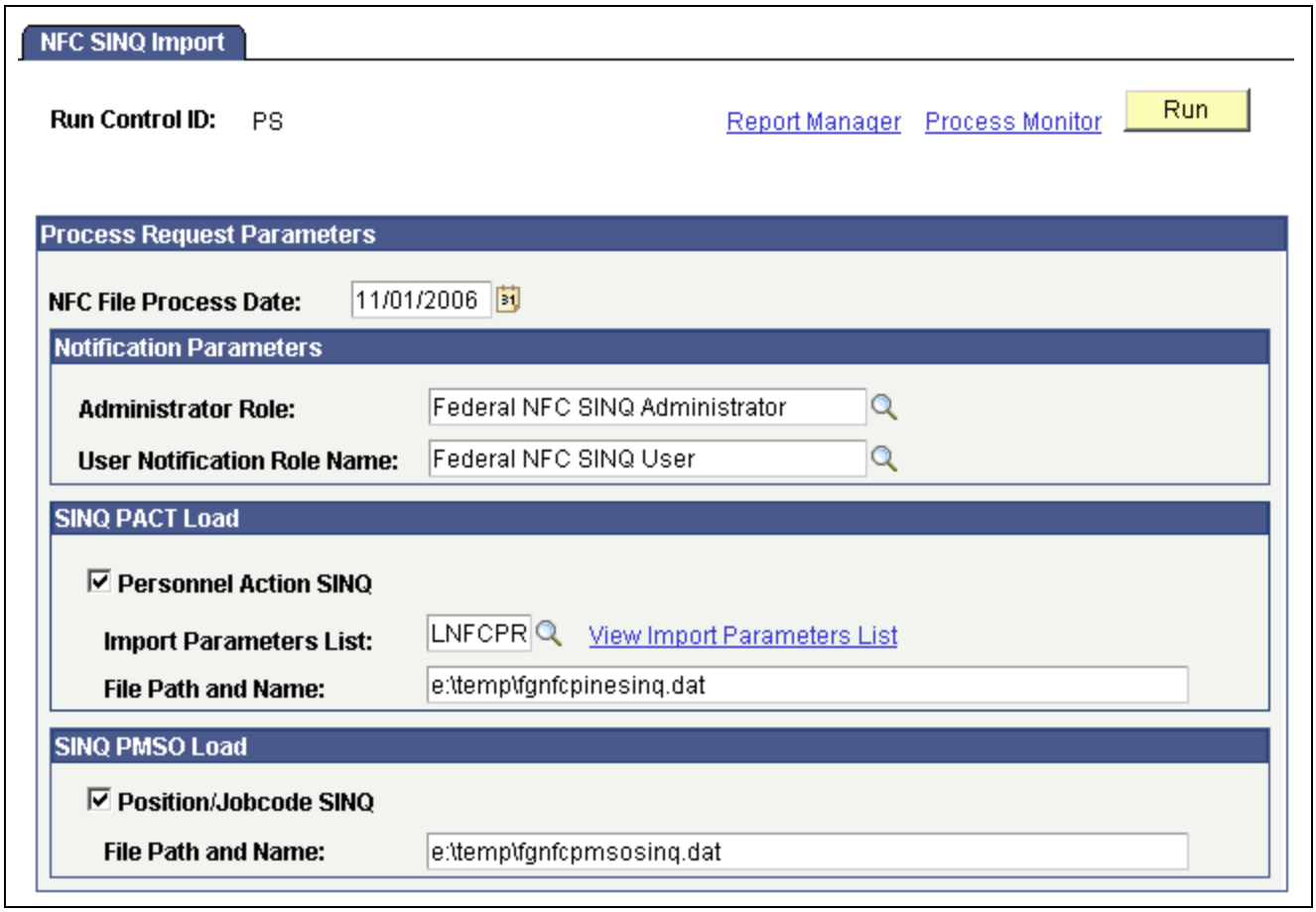
Page Used to Run the NFC SINQ Import Process

Page Name	Object Name	Navigation	Usage
NFC SINQ Import	RUNCNTL_GVTSINQ	Workforce Administration, Collective Processes, NFC Import Process USF, Run SINQ Import Process, NFC SINQ Import	Run Control component for NFC SINQ Import process

Running the NFC SINQ Import Process

Access the NFC SINQ Import page.

Copyright © 1988-2006, Oracle. All rights reserved.



NFC SINQ Import page

This page enables you to load only SINQ PACT transactions or only SINQ PMSO transactions, or both by selecting the corresponding check boxes in the SINQ PACT Load or the SINQ PMSO Load group boxes.

NFC File Process Date The date that is associated with all transactions that are imported during the SINQ Import process. System administrators can run the process only *once each day*.

Administrator Role Enter the role that is assigned to administrators for whom Worklist items and email notification will be generated for this day's SINQ Import process transactions. This role enables you to view all imported transactions and reassign individual transactions to specific users.

User Notification Role Name Enter the role that is assigned to users who will work on transactions that they last updated or saved, or transactions that the administrator assigns to them.

Personnel Action SINQ Select this check box to import PACT SINQ transactions.

Import Parameters List Select the Import Parameters List that contains the NFC document types to process.

View Import Parameters List Click this link to open the Import Documents page for the selected Import Parameters List. Modify the document types listed and click OK to return to the NFC SINQ Import page.

File Path and Name Enter a share drive file location that is recognized by the process server.

Copyright © 1988-2006, Oracle. All rights reserved.

Position/Jobcode SINQ Select this check box to import PMSO SINQ transactions.

Administering SINQs

This section discusses how to:

- Administer PACT SINQs.
- Administer PMSO SINQs.

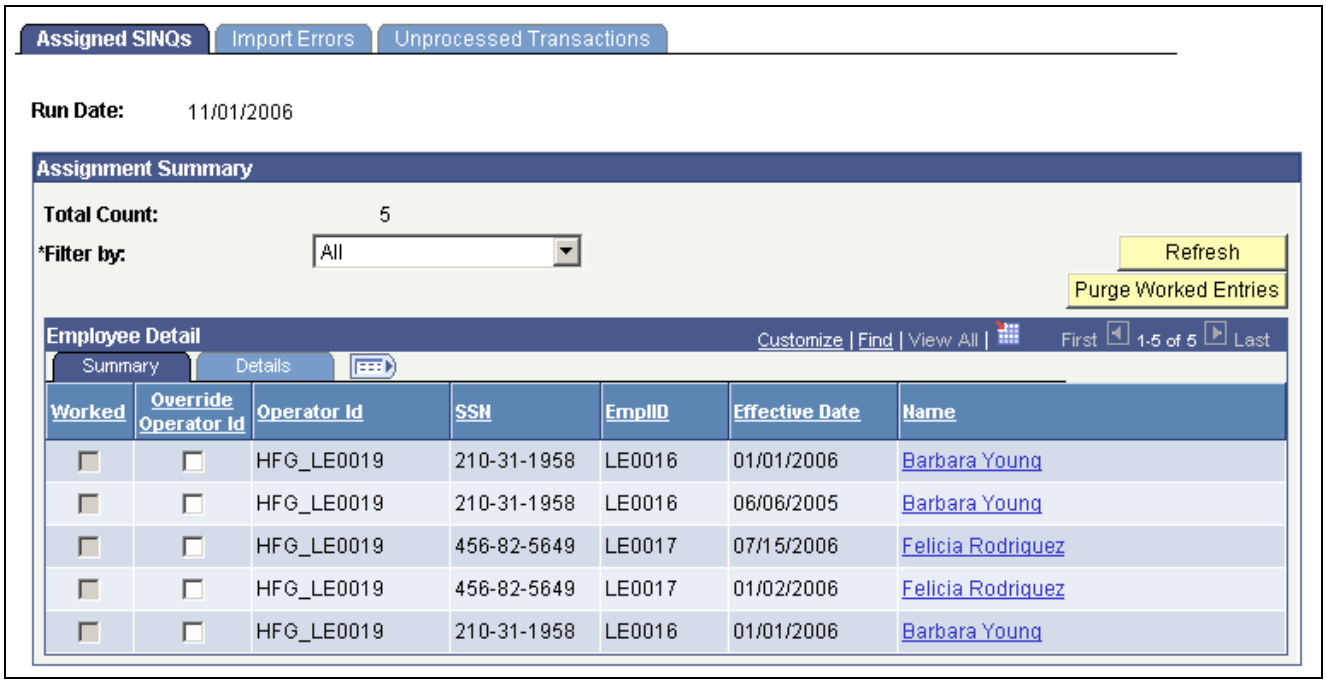
Pages Used to Administer SINQs

Page Name	Object Name	Navigation	Usage
Administer PACT SINQs - Assigned SINQs	GVT_SINQPACT_ADMIN	Workforce Administration, Collective Processes, NFC Import Process USF, Administer PACT SINQs, Assigned SINQs	Work with assigned PACT SINQs.
Administer PACT SINQs - Import Errors	GVT_SINQPACT_ERR	Workforce Administration, Collective Processes, NFC Import Process USF, Administer PACT SINQs, Import Errors	Review details about PACT transactions that were not imported.
Unprocessed Transactions	GVT_SINQPACT_UNPRO	Workforce Administration, Collective Processes, NFC Import Process USF, Administer PACT SINQs, Unprocessed Transactions	Review details and the reason why NFC transactions were not processed by the SINQ Import process.
Administer PMSO SINQs – Assigned SINQs	GVT_SINQPMSO_ADMIN	Workforce Administration, Collective Processes, NFC Import Process USF, Administer PMSO SINQs, Assigned SINQs	Work with assigned PMSO SINQs.
Administer PMSO SINQs - Import Errors	GVT_SINQPMSO_ERR	Workforce Administration, Collective Processes, NFC Import Process USF, Administer PMSO SINQs, Import Errors	Review details of PMSO error transactions.

Administering PACT SINQs

Access the Administer PACT SINQs - Assigned SINQs page.

Copyright © 1988-2006, Oracle. All rights reserved.



Administer PACT SINQs - Assigned SINQs page

Filter by Select the criterion by which to filter the transactions listed in the Assignment Summary grid. All options use *like* comparison logic, except *Effective Date* (date format) and *Pay Period* (numeric format).

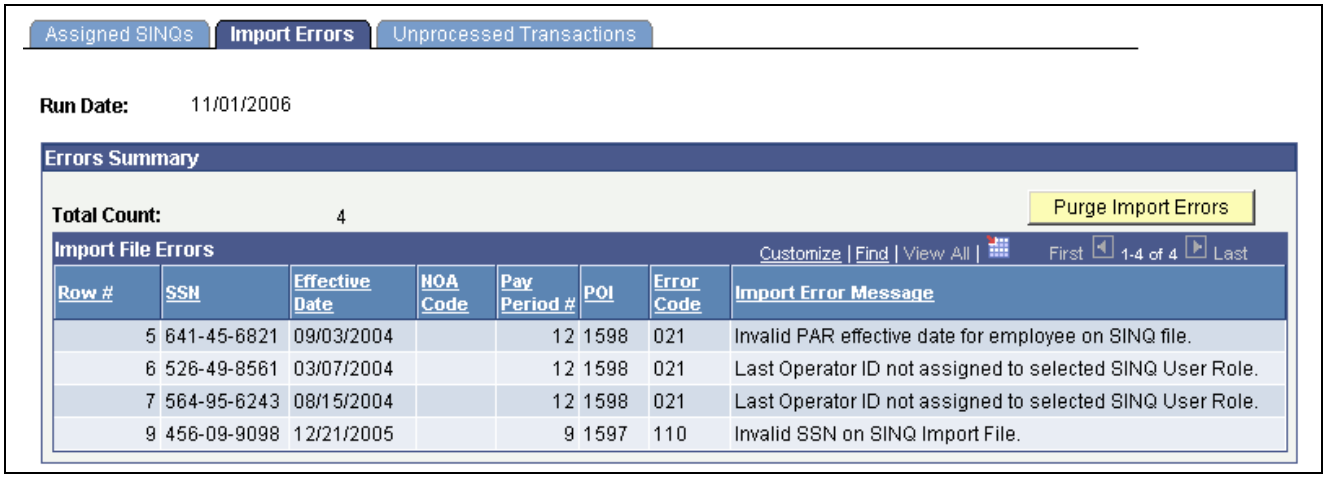
Refresh Click this button after selecting a filter and a comparison value to refresh the list of transactions.

Purge Worked Entries Click this button to remove from the grid updated transactions that have the check box selected in the Worked column.

Override Operator Id Select this check box to override the current assignment. After you select it, the Operator ID field becomes available for reassignment.

Reviewing Import Errors

Access the Administer PACT SINQs - Import Errors page.



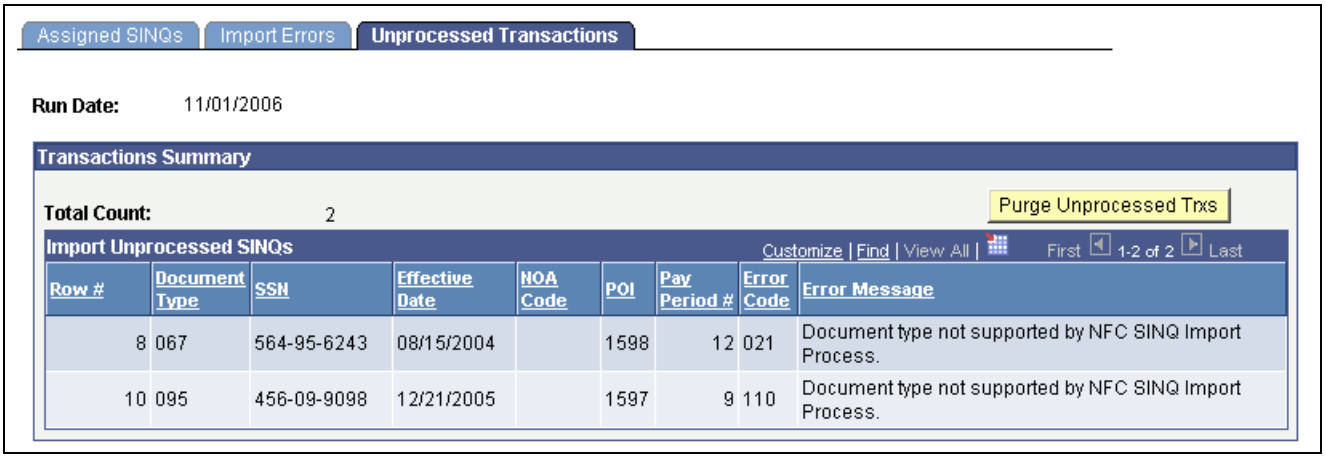
Administer PACT SINQs - Import Errors page

Copyright © 1988-2006, Oracle. All rights reserved.

Purge Import Errors Click this button to purge PACT error transactions from the import process.

Reviewing Unprocessed Transactions

Access the Unprocessed Transactions page.

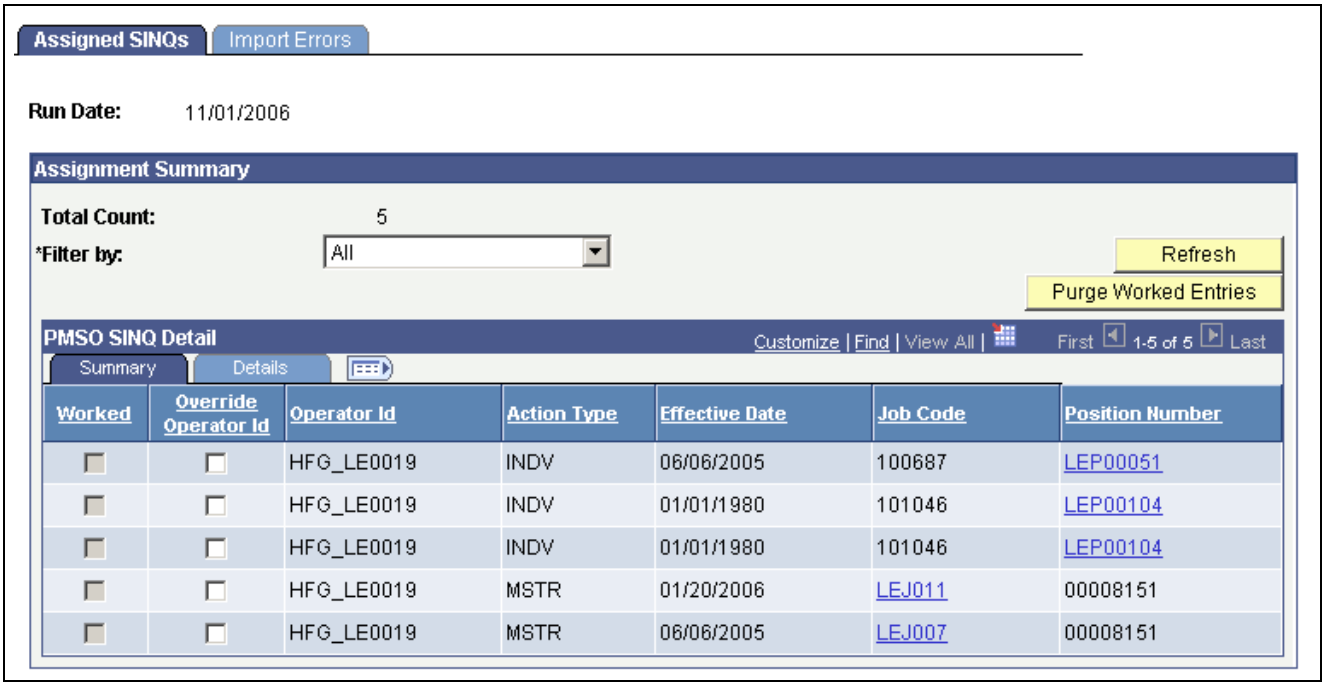


Unprocessed Transactions page

Purge Unprocessed Trxs(purge unprocessed transactions) Click this button to purge PACT unprocessed transactions from the import process.

Administering PMSO SINQs

Access the Administer PMSO SINQs - Assigned SINQs page.



Administer PMSO SINQs - Assigned SINQs page

For rows with an Action Type *INDV* and a link in the Position Number column, click the link to open the JOB_CODE_TBL component pages for that row.

Copyright © 1988-2006, Oracle. All rights reserved.

For rows with an Action Type *MSTR* and a link in the Job Code column, click the link to open the POSITION_DATA component pages for that row.

Filter by Select the criterion by which to filter the transactions listed in the Assignment Summary grid. All options use *like* comparison logic, except *Pay Period* (numeric format).

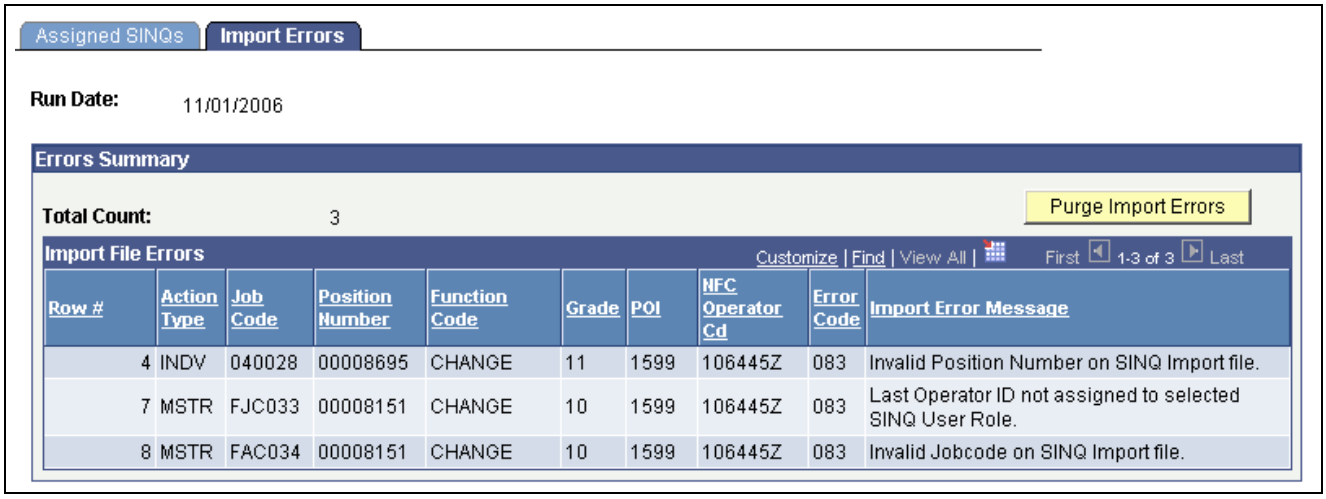
Refresh Click this button after selecting a filter and a comparison value to refresh the list of transactions.

Purge Worked Entries Click this button to remove from the grid updated transactions that have the check box selected in the Worked column.

Override Operator Id Select this check box to override the current assignment. After you select it, the Operator ID field becomes available for reassignment.

Reviewing Import Errors

Access the Administer PMSO SINQs - Import Errors page.



Administer PMSO SINQs - Import Errors page

Purge Import Errors Click this button to purge PMSO error transactions from the import process.

Working with SINQ Assignments

This section discusses how to:

- Work with PACT SINQ assignments.
- Work with PMSO SINQ assignments.

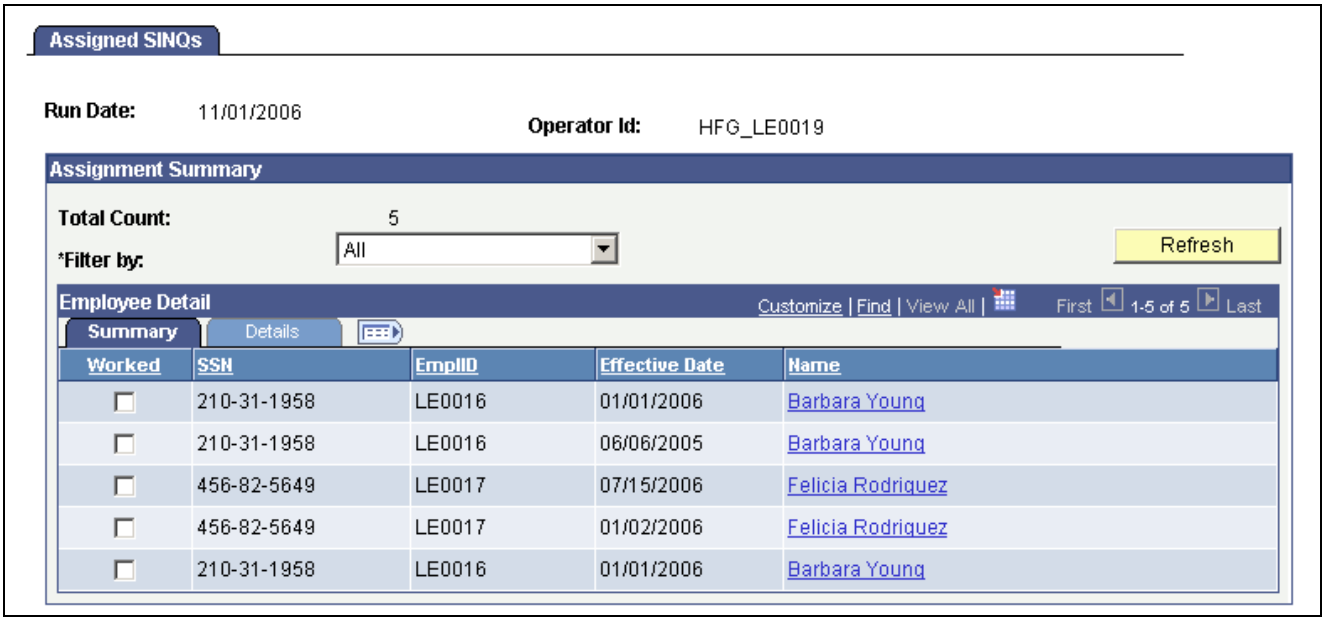
Copyright © 1988-2006, Oracle. All rights reserved.

Pages Used to Work with SINQ Assignments

Page Name	Object Name	Navigation	Usage
Assigned SINQs (PACT)	GVT_SINQPACT_USR	• Workforce Administration, Job Information, Review NFC PACT SINQs USF, Assigned SINQs • Use the Peoplesoft Worklist link to access this information.	Review and work with assigned PACT SINQs.
Assigned SINQs (PMSO)	GVT_SINQPMSO_USR	• Workforce Administration, Job Information, Review NFC PMSO SINQs USF, Assigned SINQs • Use the Peoplesoft Worklist link to access this information.	Review and work with assigned PACT SINQs.

Working with PACT SINQ Assignments

Access the Assigned SINQs (PACT) page.



Assigned SINQs (PACT) page

Filter by Select the criterion by which to filter the transactions listed in the Assignment Summary grid. All options use *like* comparison logic, except *Effective Date* (date format) and *Pay Period* (numeric format).

Refresh Click this button after selecting a filter and a comparison value to refresh the list of transactions.

Worked Select this check box to indicate that you have completed working with a row.

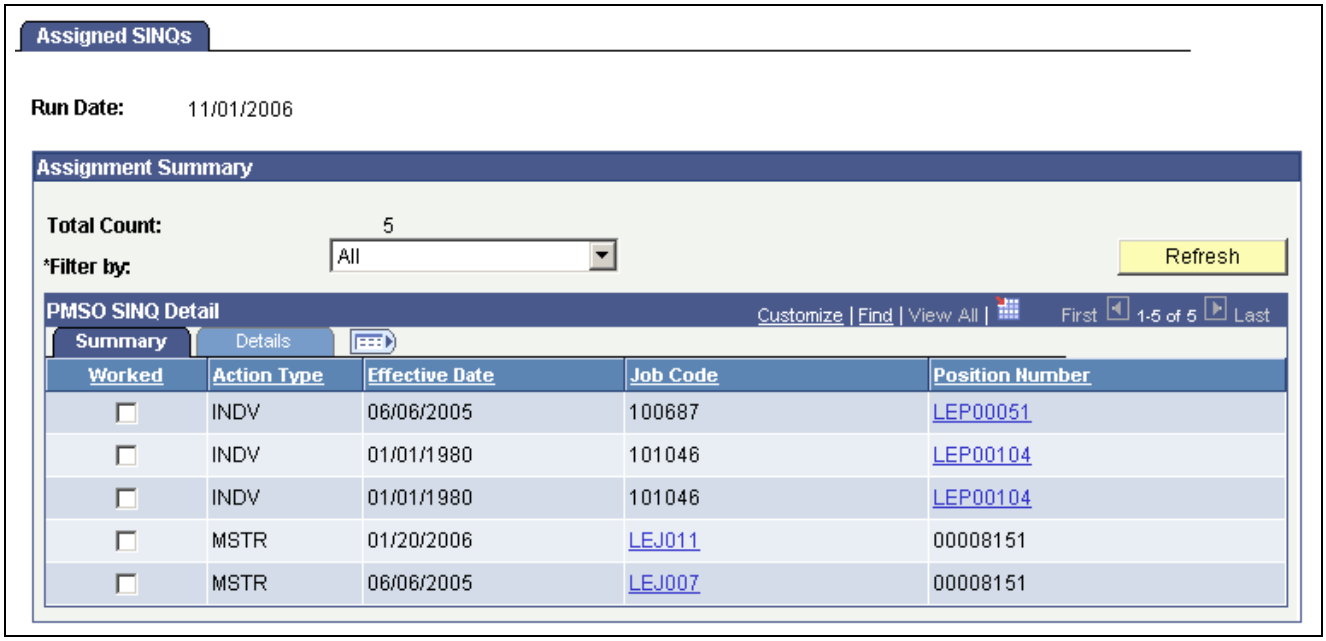
Employee Name link Click the name link to transfer to the corresponding component based on the PACT Document Type.

Copyright © 1988-2006, Oracle. All rights reserved.

See Chapter 21, "(USF) National Finance Center Processing," Understanding the Process Flow for SINQ Transactions, page 683.

Working with PMSO SINQ Assignments

Access the Assigned SINQs (PMSO) page.



Assigned SINQs (PMSO) page

Filter by Select the criterion by which to filter the transactions listed in the Assignment Summary grid. All options use *like* comparison logic, except *Pay Period* (numeric format).

Refresh Click this button after selecting a filter and a comparison value to refresh the list of transactions.

Worked Select this check box to indicate that you have completed working with a row.

Job Code Click a link in this column to work on a Job Code SINQ.

Position Number Click a link in this column to work on a Position Data SINQ.

See Chapter 21, "(USF) National Finance Center Processing," Understanding the Process Flow for SINQ Transactions, page 683.

 Copyright © 1988-2006, Oracle. All rights reserved.

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

Copyright © 1988-2006, Oracle. All rights reserved.

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

Copyright © 1988-2006, Oracle. All rights reserved.

	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."

Copyright © 1988-2006, Oracle. All rights reserved.

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.

Copyright © 1988-2006, Oracle. All rights reserved.

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*.

Copyright © 1988-2006, Oracle. All rights reserved.

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

 Copyright © 1988-2006, Oracle. All rights reserved.

	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.

Copyright © 1988-2006, Oracle. All rights reserved.

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.

Copyright © 1988-2006, Oracle. All rights reserved.

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.

Copyright © 1988-2006, Oracle. All rights reserved.

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.

Copyright © 1988-2006, Oracle. All rights reserved.

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.

Copyright © 1988-2006, Oracle. All rights reserved.

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.

Copyright © 1988-2006, Oracle. All rights reserved.

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.

Copyright © 1988-2006, Oracle. All rights reserved.

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.

Copyright © 1988-2006, Oracle. All rights reserved.

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

Copyright © 1988-2006, Oracle. All rights reserved.

	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.

Copyright © 1988-2006, Oracle. All rights reserved.

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.

Copyright © 1988-2006, Oracle. All rights reserved.

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.

Copyright © 1988-2006, Oracle. All rights reserved.

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.

Copyright © 1988-2006, Oracle. All rights reserved.

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.

Copyright © 1988-2006, Oracle. All rights reserved.

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.

Copyright © 1988-2006, Oracle. All rights reserved.

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.

Copyright © 1988-2006, Oracle. All rights reserved.

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.

Copyright © 1988-2006, Oracle. All rights reserved.

	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.

Copyright © 1988-2006, Oracle. All rights reserved.

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.

Copyright © 1988-2006, Oracle. All rights reserved.

Copyright © 1988-2006, Oracle. All rights reserved.

Index

Numerics/Symbols

60 Day Prob Term (USF) page 640
60 Day Ten Conv (USF) page 640

A

AA Security JPN component (ADDAPPT_SEC_JPN) 482
AA Security JPN page 484
AA_SETUP_JPN component 478
ACCDT_INS_TABLE component 53
accident insurance codes 55
Accident Insurance Table - Accident Insurance Address (DEU) page 54
Accident Insurance Table - Accident Insurance Table (DEU) page 54, 55
Accident Insurance table component (ACCDT_INS_TABLE) 53
ACCOM_TYPE_TABLE component 299
Accomm Job Task page 299
Accomm Option page 299
Accomm Request page 299
Accommodation Type component (ACCOM_TYPE_TABLE) 299
Accommodation Type Table page 299
Accounting Information (USF) page 244, 270
accrual classes (USF) 658
  for deferred annual/sick 665
  for leave program recipients 665, 672
  for leave transfer processing 665
  setting up earnings for leave transfers 664
Accrual Summary (USF) page 675
Action History Report (USF) page 615
Action Reason page - Action Reasons 7
Action Reason Table component (RUN_PER710) 5
Action Reason Table page - Action Reason Report 7
Action Reason Table page - Action Reasons 10
action reasons, *See* personnel action reasons
Action Reasons component (ACTION_REASON_TBL) 5
action request (SF-52) 612
ACTION_REASON_TBL component 5
ACTION_TBL component 5
Actions component (ACTION_TBL) 5
Actions page 7
Actual Headcount Report 526
Ad-Hoc Process Request page 587
Add Employee Instance USF component, Compensation page 265
Add Employment Instance USF component
  Benefits/FEHB Data page 257
  Employment 1 page 271
  Expected Pay page 268
  Other Pay Information page 267
  Personal Data page 249
Add Employment Instance USF page 242
Add New Assignment (USF) page 242
Add New Assignment page 202, 203
Add Person of Interest page 129
ADDAPPT_SEC_JPN component 482
adding a person
  entering name and biographical information 111
  entering names 112
Additional Appointment Data (JPN) page 486
Additional Appointment Information (JPN) page 486
Additional Appointment Setup (JPN) page 481
Additional Appointment Setup component (AA_SETUP_JPN) 478
Additional Appointment Setup for Existing Business Units component (RC_AA_JOBCODE_JPN) 478
Additional Appointment Setup for Existing Business Units page 481
additional appointments (kenmu)
  adding, changing, or releasing 486
  designating job record codes 482
  distributing cost 489
  recording and viewing employee data 486
  recording details 487
  setting up codes 478
  setting up dummy codes 481

Copyright © 1988-2006, Oracle. All rights reserved.

setting up security 482
setting up termination handling 485
understanding 477
understanding setup steps 479
Additional Appointments Setup (JPN) page 482
additional assignments
adding 200
setting up 202
additional documentation xxvi
Additional Info - Brazil page 79, 80
Additional Information BRA page 383
additional jobs, entering 203
additional pay
benefits credits and the primary job 104
Addl Birth Info (USF) page 242, 251
Address Data (ITA) page 393
Address History page 111
Address Information (USF) page 242, 252
Address page 316, 319
addresses
entering 115
entering (USF) 252
modifying 550
using workflow to update 550
AFI Data Details page 465, 467
AFI flat files 463
creating 470
creating company inquires on the AFI report 473
creating employee inquiries 472
maintaining detailed employee AFI data 467
maintaining employee AFI data 465
reviewing employee data on AFI files 474
Annual Leave (USF) page - Setup Wage/Separation USF 616
APE Table component (APE_TABLE_FRA) 47
APE Table page
FRA 48
APE_TABLE_FRA component 47
applicants
adding 204
hiring (USF) 279
application fundamentals xxv
appointment affidavits 279
Appointment Info (USF) page 244, 274
Appointment List JPN page 580, 582
Appointment List report (JPN) 582
Appointment Notification JPN page 580
Appointment Notification report (JPN) 580
appointment reporting
report outputs for actions 576
sorting lists using trees 577
understanding job data changes 576
Approval Levels component (MIL_APPRVL_LVL_DFN) 346
Approval Levels page 347
As-of Date Request page 587
Assign Additional Job component 200
Assigned SINQs (PACT) page 695
Assigned SINQs (PMSO) page 695, 696
Assigned SINQs page - Administer PACT SINQs 691
Assigned SINQs page - Administer PMSO SINQs 691, 693
assignment
moving to another instance 572
promoting 571
Assignment Detail page - Create Delt@ RATSB Report ESP 440, 444
Assignment Relationships
updating 570
Australia
defining movement codes 11
Automatic Action Msgs component (GVT_AUTOACTNMSG_TB) 639
automatic actions (USF) 637
administering probation terminations 641
administering tenure conversion 643
overview of menus and pages 639
performing 639
prerequisites 637
processing 640
setting up 639
understanding 638
Automatic Actions (USF) page 640
automatic leave enrollment (USF)
adjusting leave enrollment manually 658
administering 651, 652
overview 651
processing 657
qualifying for more than one leave class criteria rule 654

Copyright © 1988-2006, Oracle. All rights reserved.

reviewing 657
setting up leave class rule criteria 655
setting up the leave class rules template 653
Automatic Leave Enrollment (USF) page 653, 657
Award Action Data (USF) page 13
Award Action Data component (GVT_AWD_ACTN) 12
award actions 12
Award Data (USF) page 629
Award Type Table component (RUN_FGPER810) 12
Award Type Table page 13
awards 629

B

BA Cd Table (DEU) page 54
BA Cd table component (BA_CD_TABLE) 53
BA_CD_TABLE component 53
badge access, setting up and tracking 354
Badge History page 355, 357
badge history, tracking 357
Badge page 350
badges 350
bank account information, entering 340
bank accounts
entering for UK workers 342
recording 341
Bank Prenote Information USA page 341
banking, entering people's bank account information 341
Base (BEL) page 373
BEL Seniority page 370
Belgium
Claeys Formula severance calculations 369
entering additional seniority 370
entering protected job leave 371
generating DIMONA notifications 378
performing the Claeys calculation 372
running the Social report 381
tracking Claeys formula calculations 361
beneficiaries, *See* dependents
benefit enrollment 196
Benefit Program Participation page 196, 557
benefit programs 257, 598
benefit record numbers
working with multiple benefit record numbers 201
benefits
applying regulatory contribution limits for multiple jobs 102
benefits credits and the primary job 104
calculating benefit deductions for multiple jobs 101
calculating percent of gross deduction limits for multiple jobs 102
designating a primary job 100
determining benefits eligibility with multiple jobs 102
effect of multiple jobs on PeopleSoft Benefits Administration 102
effective of multiple jobs 99, 100
grouping multiple jobs to determine benefits eligibility 101
Benefits Program Participation page 151, 203
Benefits/FEHB Data (USF) page 243, 257
Benefits/Retirement Data (USF) page 596, 598
Betriebszaehlung 387
Biographical Details page 110, 548
tracking names 111, 112
tracking national identifications 114
biographical history, entering 113
Brazil
CAGED Report 228, 229
centralizing data for reporting purposes 85
employee registration 229, 230
entering additional workforce data 383
entering setup information for reports 80
running employment reports 228
setting up establishments 78
See Also establishments
BRCGED01 process 229
business expenses 351
Business Expenses page 350, 351
business processes 2

C

C.I.A. Codes (ITA) page - Company Codes 61
CAGED File/Report page 229

Copyright © 1988-2006, Oracle. All rights reserved.

CAGED Report (BRA) 228, 229
Caisse Primaire d'Assurance Maladie (CPAM) 48
Caisse Regionale d'Assurance Maladie (CRAM) 48
Calendar Year Request page 587
Canada
  defining reasons for personnel actions 11
  entering additional workforce data 383
  entering information for the Canada Academic Teaching Surveys 190
  entering OEE workforce survey responses 386
  entering official languages 386
  reviewing union membership 175
  running the Canadian Hire List report 232
  verifying Social Insurance Numbers for Canadian employees 114
Centralization Data (BRA) page 79, 85
Centralization Data BRA component (CENTRALIZATION_BRA) 78
CENTRALIZATION_BRA component 78
centralized data 85
change plans
  mass organization change 511
change plans for restructuring an organization
  understanding 512
Checklist Item Table component (CHKLST_ITEM_TABLE) 38
Checklist Item Table page 39
Checklist Table page 39
checklist, creating
  for a person 197
  for an employee 199
checklists 38, 39
  maintaining 126
CHKLST_ITEM_TABLE component 38
CI Exceptions (USF) page 278
CI Exceptions page 245
CIA Codes (ITA) page - Company/Estab Codes 61
CIA_TBL_ITA component 59
Cities table component (CITY_TABLE_ITA) 59
Citizenship / Country / Visa page 335
citizenship information
  entering 337
  entering for dependents 330
  managing 334
  tracking 336
Citizenship/Passport page 335, 336
CITY_TABLE_ITA component 59
Claeys Formula calculations
  calculating the severance amount 376
  defining reason codes for ending contracts 363
  entering termination events and conditions 363
  linking contract statutes to RSZ categories 365
  performing 372
  preparing to use 369
  recording replacement contracts 367
  recording terminations 366
  reviewing variables 373
  running the termination notification report 378
  setting up employment contract statutes 364
  severance 369
  tracking 361
  understanding severance 369
Clearance History page 355, 357
CNT_CLAUSE_TABLE component 41
CNT_TEMPLATE_TABLE component 41
CNT001 286
(CNTRCT_TYPE_GRP component 41
comments, submitting xxx
common elements xxx
COMP_CD_ITA component 59
COMP_ESTAB_CD_ITA component 59
companies (ESP) 75
Company Codes component (COMP_CD_ITA) 59
company credit cards
  assigning to workers 310
  entering vendors 310
  overview 308
Company Inqueries page - Create AFI File ESP 465, 473
company property
  assigning to workers 315
  assigning values 314
  car identification 313
  identifying 313

Copyright © 1988-2006, Oracle. All rights reserved.

Company Property component (COMPANY_PROP_TBL) 312
Company Property page - Company Property 313
Company Property page - Job Information 313, 315
company property, handling 312
Company Setup (ESP) page 68, 75
Company Setup page 438
Company Statistics (CHE) page 387
Company Statistics report (Betriebszaehlung) 387
Company/Estab Codes component (COMP_ESTAB_CD_ITA) 59
COMPANY_PROP_TBL component 312
Compensation (USF) page 244, 265
Compensation page 150, 181, 203, 557, 575
compensation, refreshing 575
Completion of IC Transfer report 510
Component Categories component (MIL_CMP_CAT_DEFN) 29
Component Categories page 31
Concurrent Hire USF component 200
concurrent jobs, *See* multiple jobs
  adding 200
  entering 203
  setting up 202
Configuration page 18, 23
Confirmation page 221
Contact Address/Phone page 332, 550
contact information xxx
Contact Information page 110, 115, 549
  tracking addresses 115
  tracking email addresses 116
  tracking phone numbers 116
contingent worker contracts, *See* contracts
  adding basic information 286
  adding signature date and probation information 294
  adding special clauses 289
  generating the Contract Information report 295
  tracking 284
contingent worker data
  locating personnel records 282
  overview 281
  tracking contracts 284
    See Also workforce contracts
contingent worker IDs (identification)
 person
  assigning 109
contingent workers
  adding 133
  adding additional assignments 200
  understanding contingent worker relationships 87
  understanding employee record numbers (ERNs) 91
  understanding organizational instances 88
CONTR_RSZS_BEL component 361
Contract Clause Table component (CNT_CLAUSE_TABLE) 41
Contract Clause Table page 42
Contract Ending (BEL) page 362, 366
Contract Ending component (CONTRACT_END_BEL) 361
Contract Information page 286, 295
Contract Information report 295
Contract Pay Type CAN & USA component (CONTRACT_PAY_TYPE) 41
Contract Pay Type page 42, 45
Contract Printing Data page 453, 461
Contract Printing Mapping page 453
Contract Printing page 453, 459
Contract Replacement (BEL) page 362, 367
Contract Replacement component (CONTRACT_REPL_BEL) 361
Contract Status/Content page 286
Contract Template Table component (CNT_TEMPLATE_TABLE) 41
Contract Template Table page 42, 44
Contract Type Groups component (CNTRCT_TYPE_GRP) 41
Contract Type Groups page 42
Contract Type Table page 42
Contract Type/Clauses page 286, 289
contract types
  defining 42
  grouping 42
CONTRACT_END_BEL component 361
CONTRACT_PAY_TYPE Contract Pay Type CAN & USA component 41
CONTRACT_REPL_BEL component 361
CONTRACT_TYPE_TBL component 41

Copyright © 1988-2006, Oracle. All rights reserved.

contracts
creating contract templates 44
defining contract pay types 45
defining contract type groups 42
defining contract types 42
setting up 41
contracts (ESP)
batch contract printing process 463
creating PDF form definitions 454
defining PDF form details 456
generating 451
generating and printing contracts for employees 459
mapping PDF form details to XML nodes 457
mapping types to XML nodes 453
printing 448
reviewing and editing contract data 461
Contrat@ Error page 427, 433
Contrat@ Mapping page 414
Contrata communications (ESP)
managing 422
Contrata reporting (ESP)
delivered XML codes 423
delivered XML nodes 425
delivered XML templates 425
managing response files 433
previewing XML files 432
viewing Contrata errors 433
viewing employee details 431
XML file generation 425
XML file, defining 427
XML file, generating 428
Contribution (ESP) page 68, 73
Copy Template component (HR_TBH_COPY) 14
Copy Template page 19, 27
country codes (ESP) 69
country functionality
(FRA) entering external variables 50
(FRA) entering salary ceiling information 50
(FRA) entering social security ceiling information 50
(FRA) maintaining INSEE codes 49
country-specific person data 116
country-specific tables
setting up 47
country-specific workforce data 383
COUNTRY_TABLE_ITA component 59
CPAM 48
CPAM_TABLE_FRA component 47
CRAM 48
CRAM_TBL_FRA component 47
Create Delt@ PAT/RAF Report ESP - Definition page 440
Create Delt@ PAT/RAF Report ESP - Details page 444
Credit Card Vendor page 310
credit cards, *See* company credit cards
encryption 309, 311
cross-references xxix
Customer Connection website xxvi

D

Data Control (USF) page 242, 245, 611
Database Audit page 588
Database Audit report 588
database audits 588
deaths
entering 565
requesting terminations (USF) 634
Declaração de Informações à Receita Federal (DIRF) 84
deduction limits
multiple jobs 105
Define Contract Clauses component 42
Define Contract Templates component 42
Define Contract Types component 42
Define Contract Types component (CONTRACT_TYPE_TBL) 41
Definition page - Create Contrat@ XML File ESP 427
Definition page - Create Delt@ PAT/RAF Report ESP 440
Definition page - Create Delt@ RATSB Report ESP 440
Delta communications (ESP)
defining the XML file 440
delivered XML codes for reporting 435
delivered XML nodes for reporting 436
generating the XML file for Delta reporting 441
previewing XML files 445
steps to manage industrial accident information 436
viewing employee details for Delta reporting 444
viewing managing 434
Demote an Instance page 571, 573

Copyright © 1988-2006, Oracle. All rights reserved.

Denial Code (USF) page 660, 661
Denial Code component (GVT_DENIAL_CD_TBL) 660
denial notifications (USF) 661
Department Action Notices page 578
Departmental Hierarchy (USF) page 243
departmental reassignments, entering (USF) 632
departmental transfers 559
Depdnt Citizenship/Passport page - Depdnt Identification Details 329
Depdnt Citizenship/Passport page -Depdnt Identification Details 317
Depdnt Visa/Permit Data page - Depdnt Identification Details 317, 330
Dependent Data component 316
Dependent Information component 316
Dependent/Benef (NLD) page 317, 328
Dependent/Beneficiary Riders page 316, 327
dependents
  entering addresses 319
  entering court-ordered benefits 327
  entering dependent information 320
  entering identification data 329
  entering names 317
  entering visa and permit data 330
  tracking dependent and beneficiary data 315
  understanding dependent data 316
  viewing list for employee 328
Deployment Reasons component (MIL_DEPL_REASON) 346
Deployment Reasons page 347
Description page - Incident Details 439
Detail Assignment (USF) page 243, 261
Detailed PAT Data 439
Detailed PAT Data page 439
Detailed RAF Data page 439
Detailed RATSB Data page 439
Details page - Create Contrat@ XML File ESP 427, 431
Details page - Create Delt@ PAT/RAF Report ESP 440
Details page - Injury Details 439
Details page - Promote Assignment 571
Diagnoses page - Injury Details 439
DIMONA Notification (BEL) page 379
DIMONA notifications
  creating 379
  creating update and termination notifications 381
  generating 378
  HRBEL_DIM_AE process 380
  reviewing 380
  understanding 378
DIRF 84
disabilities
  documenting accommodations 307
  entering 300
  paying, Job Earnings Distribution page 195
  running the Disability report (ITA) 307
  tracking 299
Disability BRA page 300
Disability Category Setup (DEU) page 300
Disability Codes (NZL) page 67
Disability Codes component (DISABILITY_TBL_NZL) 67
disability leave
  paying workers 568
Disability page 299, 300
Disability Report (ITA) page 300
DISABILITY_TBL_NZL component 67
DL_LINK_TBL component 38
documentation
  printed xxvi
  related xxvi
  updates xxvi
Donor Contribution (USF) page 667, 669
DRIVE_LIC_TBL component 28
driver's license data
  entering 339
  managing 338
Drivers License page 339
Drivers License Type Tbl component (DRIVE_LIC_TBL) 28
Drivers License Type Tbl page 28
Duties Type page 36
Dynamic Link component (DL_LINK_TBL) 38
Dynamic Link page 39

E

Edit Additional Appointment Information (JPN) page 486, 487
Edit Address page 111
Edit Name page 110
Edit POI Relationship page 129

Copyright © 1988-2006, Oracle. All rights reserved.

education 254
Education Details (USF) page 243, 254
Eerste Dag Melding, *See* First Day Notifications
effective dates
entering multiple actions with same effective date 558, 627
using in personnel actions (USF) 626
eligibility
multiple jobs and PeopleSoft Pension Administration eligibility 106
Eligibility Criteria component
using in multiple jobs 102
eligibility rules
using in multiple jobs 102
ELTP 652
email addresses
entering 116
Email History page 355
emergency contacts
entering primary contact information 332
tracking 331
updating addresses 550, 551
Emergency Contacts page 332
Emergency Leave Transfer Details (USF) page 660
Emergency Leave Transfer Details component (GVT_LV_DON_TGT_SEC) 660
Emergency Leave Transfer Program 652
Empl Class Table page 36
Empl Comp Cd Ita page 393
EMPL_CLASS_TABLE component 34
Empl_Rcd field names, defining 539
EmplID change 535
viewing 536
EmplIDs (identification)
changing and deleting 534
images 354
Employee Accruals (USF) page 653, 658
Employee AFI Data page 465
Employee Assignment List report (JPN) 584
employee checklist 199
Employee Checklist page 152, 199
Employee Class component (EMPL_CLASS_TABLE) 34
Employee Compensation page 576
employee contracts, *See* contracts
recording Belgian replacement contracts 367
employee data
adding and updating data for personnel action requests (USF) 604
additional data 281
locating personnel records 282
overview 281
refreshing Employees table 585
searching 282, 284
searching by national ID 284
security considerations (USF) 628
tracking contracts 284
See Also workforce contracts
viewing non-Administer Workforce summary pages 599
Employee Data Tracking MIL page 347
Employee Home Address Listing page 551
employee IDs (identification)
assigning 109
defining types 28
employee images 354
employee information
searching by national ID 284
searching for 282, 284
Employee Inqueries page - Create AFI File ESP 465, 472
employee job history
viewing 589, 590
viewing salary history 593
employee personal and job data (USF), viewing 595
Employee Photo page 350, 354
employee placement plans
understanding 516, 524
Employee Profile page 575
employee record numbers
comparing to multiple jobs 95
example 93, 98
understanding employee record numbers (ERNs) 91
employee registration (BRA) 229, 230
Employee Registry Report page 229, 230
Employee Request (USF) component 603
employee status and personnel actions (USF) 624
Employee Turnover Analysis page 579
employees
adding additional assignments 200

Copyright © 1988-2006, Oracle. All rights reserved.

hiring 133
understanding employee record numbers (ERNs) 91
understanding employee relationships 87
understanding organizational instances 88
Employees Birthday page 551
Employees on Leaves of Absence page 578
Employees page - Create AFI File ESP 465, 470
Employees table, refreshing 585
Employment 1 (USF) page 244, 271
Employment 2 (USF) page 244, 275
employment contracts
adding basic information 286
adding signature date and probation information 294
adding special clauses 289
defining reason codes for ending (BEL) 363
generating the Contract Information report 295
linking Belgian contract statutes to RSZ categories 365
recording termination information for Belgian employees 366
recording terms for ending for Belgian employees 363
setting up Belgian employment contract statutes 364
tracking 284
employment data 34
employment data (USF) 267
Employment Data (USF) page 596
Employment Information page 150, 185, 203, 557
Employment Instance USF
new 245
Employment Instance USF component
Accounting Information page 270
Detail Assignment page 261
FEGLI/Retirement/FICA page 258
Job Tracking Info page 248
PAR Remarks page 247
Position page 263
Employment Record Numbers (ERNs)
deleting 537
encryption
credit cards 309, 311
End Contract Reason - BEL component (REAS_END_TBL_BEL) 361
End Contract Reason - BEL page 362, 363
End Contract Type - BEL component (END_CONT_TBL_BEL) 361
End Contract Type - BEL page 362, 363
end of employment information 394
END_CONT_TBL_BEL component 361
Enter Cost Rate Information (JPN) page 486, 489
Enter Employee Information page 221, 223
Enter Hire Details page 220, 222
entering requests (USF) 634
Equal Opportunities report 395
ERN Delete Control page 539, 540
ERN Delete Exception Tables page 539, 542
ERN Delete Field Names page 539
ERN Delete Process page 539, 544
ERN Delete process results 545
ERN Delete Process Results page 539, 545
ERN deletions
defining exception tables 542
processing 544
ERNs
comparing to multiple jobs 95
example 93, 98
understanding employee record numbers (ERNs) 91
Error Transaction page 221
ES-931
entering identification information 616
entering leave information 617
entering severance pay information 618
generating 615
ESTAB_TBL_BRA component 78
ESTAB_TYPE_BRA component 78
Establishment Address page 438
Establishment BRA component (ESTAB_TBL_BRA) 78
Establishment ID Type (BRA) page 79
Establishment ID Type (Brazil) page 79
Establishment ID Type component (ESTAB_TYPE_BRA) 78
establishment ID types 79
establishments

Copyright © 1988-2006, Oracle. All rights reserved.

grouping 85
setting up 80
setting up ID types 79
ethnic groups
defining 36
Ethnic Groups component (ETHNIC_GROUP_GBL) 34
Ethnic Groups page 35, 36
ETHNIC_GROUP_GBL component 34
Evaluation Method component
using in multiple jobs 102
events
marking for reprocessing 105
triggering events multiple jobs 104
expected pay 269
Expected Pay (USF) page 244, 268
Expiration Dates (USF) page 244, 274
Expiration Inquiry page 355, 358
Expiration Notification page 355, 358
expiration notification, setting up 358
expirations, pending, searching 358
External Leave Donations (USF) page 667, 670
external variables (FRA) 50
External Variables component (EXTERNAL_VARIABLES) 47
External Variables page
FRA 49, 50
EXTERNAL_VARIABLES component 47

F

FEGLI/Retirement/FICA (USF) page 243, 258
festive advances 191
FGPER810 13
FGSF61 280
FGSF75 280
finalizing employee placement plans, overview 511
finalizing organization plans
overview 511
Financial Disclosure (USF) page 277
First Day Notification page 233, 234
First Day Notifications 232
First Day Report Setup page 233
FLSA overtime rules
multiple jobs 105
Form Details page 453, 456
FPMACTION_PNL2 component 5
FPS Action component (FPMACTION_PNL2) 5
FPS Action page 7
FRA CPAM Table component (CPAM_TABLE_FRA) 47
FRA CPAM Table page 49
FRA CRAM table component (CRAM_TBL_FRA) 47
FRA CRAM Table page 49
France
defining hours type codes 52
entering additional workforce data 388
entering external variables 50
entering military service information 388
entering salary and social security ceiling information 50
maintaining INSEE codes 49
maintaining social security tracking codes 48
OCC_ILLNESS_FRA 52
setting up occupational illness categories 52
setting up workforce tables 47
tracking mandates 388
From/Thru Dates Request page 587
Function Code Table (DEU) page 55
Function Code Table component (FUNCTION_CD_TBL) 53
FUNCTION_CD_TBL component 53
Future Employee Assignment List page 525, 527

G

(GBR) Building Society Details page 340, 344
General Availability MIL page 347
General Comments page 350
Generation File page - Create Contrat@ XML File ESP 427, 428
Generation File page - Create Delt@ PAT/RAF Report ESP 440, 441
Generation File page - Create Delt@ RATSB Report ESP 440
Germany
Berufsgenossenschaften 54
Bundesanstalt fur Arbeit 54
defining accident insurance codes 55
defining reasons for personnel actions 12

Copyright © 1988-2006, Oracle. All rights reserved.

entering Nation Deuev codes 56
German Deuev Directive 56
industrial inspection codes 55
setting up workforce tables 53
social insurance codes 55
understanding social insurance 54
Verzeichnis der Berufsbezeichnungen 54
global assignments
action reasons 6
entering dependent identification data 329
entering dependent visa and permit data 330
glossary 697
GPES_SLF_INS_DATA component 67
GPS 83
Grades Associated with Ranks page 31, 33
Grouping Method component
using in multiple jobs 102
Guia de Recolhimento da Previdência Social (GPS) 83
GVT_AUTOACTNMSG_TB component 639
GVT_AWD_ACTN component 12
GVT_DENIAL_CD_TBL component 660
GVT_LV_BANKMEM_SEC component 660
GVT_LV_CLS_RULES component 652
GVT_LV_DON_TGT_SEC component 660
GVT_LV_XFR_TYP_TBL component 660
GVT_LVCLSRUL_TMPLT components 652
GVT_NFC_DOC_LIST component 686
GVT_NFC_DOC_TYPE component 685

H

Headcount Plan by Department page 513, 514
headcount plan by department, specifying 514
Headcount Plan Listing page 513, 515, 525, 526
headcount plan listing, viewing 515
Heavily Disabled (DEU) page 300
Hire Employee USF component
Addl Birth Info page 251
Address Information page 252
Appointment Info page 274
Data Control page 245
Education Details page 254
Expiration Dates page 274
Job page 255
Marital Status page 253
Veterans Info page 252
Hire List page 232
hire templates
categories 22
copying 27
section fields 22
security 16
setting up 14
Template Creation page 23
hiring
employees and contingent workers 133
Hiring Center (ESP) page 69, 77
Hiring Center Table component (HIRING_CENTER_ESP) 67
hiring centers 77
hiring employees
Add Employment Instance USF component 239
distributing job earnings 193
entering benefit enrollment information 196
entering compensation 181
entering contact information 115
entering job information 160
entering job location and position 152
entering labor agreement information 171
entering name and biographical information 111
entering optional employment data 185
entering payroll processing data 175
entering salary plans 179
United States Federal, *See* hiring United States Federal (USF) employees
hiring process 133
See Also workforce
hiring United States Federal (USF) employees
assigning positions 279
employment data default values 267
entering address information 252
entering appointment limits 274

Copyright © 1988-2006, Oracle. All rights reserved.

entering birth information 251
entering data control information 245
entering education details 254
entering job information 255
entering marital information 253
entering veteran information 252
expected pay 269
hiring applicants 279
overview 237
See Also Add Employment Instance USF component
quoted pay 269
HIRING_CENTER_ESP component 67
historical employment information 271
Hour Type Table (FRA) page 49, 52
Hour Type table (HOUR_TYPE_TABLE) component 47
HOUR_TYPE_TABLE component 47
hours type codes 52
HR Request (USF) component 603
See Also personnel action requests (USF)
HR status
personnel actions 553
HR_PER501A 534
HR_REACTVTER process 298
HR_TBH_COPY component 14
HR_TBH_CREATION component 14
HR_TBH_CTG_TBL component 14
HR_TBH_RECDEFN component 14
HR_TBH_SECDEFN component 14
HRBEL_DIM_AE process 380

I

I-9 data, archiving 408
I-9 Form - Employee Information and Verification page 399
I-9 Form - Employer Review and Verification page 399, 402
I-9 Form - Perparer/Translator Certification page 399, 401
I-9 Form - Preparer Notification page 399
I-9 Form - Submit Confirmation page 399, 402
I-9 Form - Updating and Reverification page 399
I-9 Forms (USA)
managing 398
I-9 Receipt/Expiration Report page 399, 407
IC Trans External Company/Dept (JPN) page 65
IC Trans External Company/Dept component (INTCPX_CPY_JPN) 64, 478
IC Trans External Company/Dept page 65, 481
IC Trans External Superv Lvl (JPN) page 65
IC Trans External Superv Lvl component (INTCPX_SPV_JPN) 64, 478
IC Trans External Superv Lvl page 481
ID Change page 535
ID Change/Delete Process Log page 535, 536
ID Delete page 535
Identification (USF) page - Setup Wage/Separation USF 616
Ido Candidate Listing page 517
Ido Employee Listing page 525, 527
implementation
overview 3
Import Documents page 687
Import Errors page - Administer PACT SINQs 691, 692
Import Errors page - Administer PMSO SINQs 691, 694
INAIL Codes (ITA) page - Company Codes 61
INAIL Codes (ITA) page - Company/Estab Codes 61
INAIL_TBL_ITA component 59
Incident page - Incident Details 439
increasing the workforce
through templates and job applicants 208
individual retirement records 634
INDUST_INSP_GER component 53
Industrial Inspection (DEU) page 55
Industrial Inspection component (INDUST_INSP_GER) 53
Industry Activity (ESP) page 68
Industry Activity component (INDUSTRY_ACT_ESP) 67
INDUSTRY_ACT_ESP component 67
Injury page - Injury Details 439
INPDAI Codes (ITA) page - Company Codes 61
INPDAI Codes (ITA) page - Company/Estab Codes 61

Copyright © 1988-2006, Oracle. All rights reserved.

INPDAI_TBL_ITA component 59
INPS (Istituto Nazionale per la Previdenza Sociale) codes 62
INPS Codes (ITA) page - Company Codes 60
INPS Codes (ITA) page - Company/Estab Codes 61
INPS Site component (INPS_SITE_ ITA) 59
INPS Site page 60
INPS_SITE_ITA component 59
INPS_TBL_ITA component 59
INSEE codes
(FRA) maintaining 49
INSEE Table component (INSEE_TABLE_FRA) 47
Insee Table FRA page 48
INSEE Table FRA page 49
INSEE_TABLE_FRA component 47
instances
demoting 573
example 89
understanding employee record numbers (ERNs) 91
understanding organizational relationships 88
INSUR_COMPANY_ESP component 67
insurance companies
entering information (ESP) 70
Insurance Company (ESP) page 68, 70
Insurance Company component (INSUR_COMPANY_ESP) 67
INTCPX_CPY_JPN component 64, 478
INTCPX_SPV_JPN component 64, 478
integrations 3
Inter-bank Payment Code (MEX), specifying 344
Inter-bank Payment Scheme page 340, 344
intercompany transfers (shukkou)
and search page security 508
entering and maintaining home/host data 496
multiple companies using single HR database 501, 505
overview 491
PER065JP 510
running the Completion of IC Transfer report 510
selecting actions and reasons for 495
setting compensation owner 496
setting up employee data 495
setting up intercompany transfer company data 64
single company using single HR database 497
summary of home/host data 491
understanding 491
Work Location page 158
International Bank Account Nbr page 340
IRR, *See* individual retirement records
IT Country FCode (ITA) page 62
IT Country FCode component (COUNTRY_TABLE_ITA) 59
ITA C.I.A. table component (CIA_TBL_ITA) 59
ITA C.I.A. Table page 59
ITA City Table page 60
ITA Employee Documentation page 393
ITA Employee Job Letter page 393
ITA Employee Terms page 394, 395
ITA Equal Opportunities page 396
ITA INAIL table component (INAIL_TBL_ITA) 59
ITA INAIL Table page 60
ITA INPDAI table component (INPDAI_TBL_ITA) 59
ITA INPDAI Table page 60
ITA INPS table component (INPS_TBL_ITA) 59
ITA INPS Table page 60, 62
ITA Matricula Book Calc page 393
ITA PREV table component (PREV_TBL_ITA) 59
ITA PREV Table page 60
ITA Seniority Notification component (SENIORIT_NOTIF_ITA) 59
ITA Seniority Notification page 64
Italy
defining INPS codes 62
defining seniority notification periods 64
recording additional hiring data 392
recording end of employment information 394
running the Disability report 307
running the Equal Opportunities report 395
running the Matricula Book Calculation process 393

Copyright © 1988-2006, Oracle. All rights reserved.

setting up Italian workforce tables 59

J

Japan
appointment reporting for job data changes 576
intercompany transfers, Work Location page 158
PER065JP 510
running the Appointment List report 582
running the Appointment Notification report 580
running the Employee Assignment List report 584
setting up intercompany transfer company data 64
tracking additional appointments (kenmu) 477
tracking intercompany transfers (shukkou) 491
Job (USF) page 243, 255
job codes 160
job data
adding and updating 133
changing 532
creating an organizational instances 88
effect of multiple jobs 99
effective dates 557
running reports 576
security considerations for updating 553
security for managing employees and contingent workers 143
understanding effective dates 552
understanding employee record numbers (ERNs) 91
updating 552
updating pay rate changes 560
viewing (USF) 597
Job Data component
Compensation page 181
Job Information page 160
Payroll page 175
Salary Plan page 179
Work Location page 152
job data reports 576
Job Data1 (USF) page 596, 597
Job Data2 (USF) page 596
Job Earnings Distribution page 151, 193, 203, 557, 575
job history
viewing 589, 590
viewing salary history 593
Job Information page 148, 160, 202, 556
job information, updating 531
Job Labor page 148, 171, 203, 556
job locations 152
job records, adding versus updating 143
Job Summary JPN page 486, 589
Job Tracking Info (USF) page 242, 248
jobs 87
See Also multiple jobs
JPN Completion of IC Transfer page 510
JPN Employee Assignment List 580
JPN Employee Assignment List page 584
(JPN) assigning internal identification numbers 144

L

labor agreements 171
leave (USF), managing 651
leave bank 652
Leave Bank Application (USF) page 667
Leave Bank Details (USF) page 660
Leave Bank Details component (GVT_LV_BANKMEM_SEC) 660
Leave Class Auto Entry Audit (USF) page 653, 657
leave class rule criteria (USF) 655
leave class rules (USF) 666
Leave Class Rules (USF) page 653, 655, 666
Leave Class Rules Criteria USF component (GVT_LVCLSRUL_TMPLT) 652
leave class rules template (USF) 653
Leave Class Rules Template (USF) page 653
Leave Class Rules USF component (GVT_LV_CLS_RULES) 652
leave contributions
another agency's leave transfer program 670
external leave transfer program 670
leave bank or emergency leave transfer program 667
voluntary transfer program 669
Leave Donation Tracking (USF) page 674, 675

Copyright © 1988-2006, Oracle. All rights reserved.

leave donations (USF)
administering 666
viewing leave bank and emergency leave transfer programs 674
viewing voluntary leave transfer programs 675
leave earning types (USF) 663
leave enrollment (USF), automatic 651
See Also automatic leave enrollment (USF)
administering 652
leave enrollment (USF), manual 658
Leave Ledger (USF) page 674
leave program accrual class (USF), enrolling participants 672
Leave Program Summary (USF) page 674, 676
leave program type 657
Leave Program Type Table (USF) page 660, 661
Leave Program Type Table component (GVT_LV_XFR_TYP_TBL) 660
Leave Recipient Info (USF) page 671
leave recipients (USF) 670
leave transfer earnings codes (USF)
donors and recipient accruals 664
use for transferred leave 664
leave transfer programs (USF)
reports 677
setting up 661
viewing a summary of participation 676
leave transfers (USF)
entering leave contributions 667, 669, 670
See Also leave contributions
entering leave requests 671
overview 652
setting up denial notifications 661
setting up earnings accrual classes 664
setting up earnings codes 662, 664
See Also leave transfer earnings codes (USF)
setting up leave class rules 666
setting up leave transfer programs 661
setting up programs 660
updating the Additional Pay page and leave ledgers 670, 672
viewing accrual balances after processing payroll 675
viewing contributions or hours received after running the Leave Bank and Transfer process 676
viewing data 673
viewing leave donations 674, 675
See Also leave donations (USF)
viewing recipient accrual balances 673
viewing summary data for a leave transfer program 676
leaves of absence
entering requests (USF) 633
entering returns from leave 564
overview 563
tracking multiple types for one worker 563
listing IDO candidates 517
Load Response File page 427, 433
local functionality
(FRA) entering external variables 50
(FRA) entering salary and social security ceiling information 50
(FRA) maintaining INSEE codes 49
Location page - Incident Details 439

M

Mailing Address (USF) page 596
Mailing Labels page 551
Maintain Bank Accounts page 340, 341
Maintain Employee Credit Card Data page 310
Malaysia
assigning festive advance types 191
setting up religions 66
Manage Hire Details page 206, 228
Manage Hires Detail page 205, 222
Manage Hires page 205, 221, 227
Manage Positions business process 279
managing job data 143
managing leave (USF) 651
See Also automatic leave enrollment (USF)
mandates (FRA) 388
Mandates (FRA) page 388
Manual status updates
WGIs 649
Marital Status (USF) page 243, 253
Mass Employee Transfer page 525, 528
mass organization change
understanding 511
maternity leave 633

Copyright © 1988-2006, Oracle. All rights reserved.

Matricula Book Calculation process 393
Mexico
entering IMSS notification information 12
MIL_APPRVL_LVL_DFN component 346
MIL_CMP_CAT_DEFN component 29
MIL_DEPL_REASON component 346
MIL_ORD_CODE_DEFN component 346
MIL_REASSGN_RSN component 346
MIL_SERVICE_DEFN component 29
MIL_SKL_GRD_DEFN component 29
MIL_SVC_COMPONENT component 29
MIL_WRN_TYPE_DEFN component 29
military
approvals for job changes 346
associating salary grades to ranks 33
availability 347
availability for deployment or reassignment 346
deployment and reassignment 347
service member's availability for deployment or reassignment 348
military ranks
synchronizing with Manage Profiles 568, 569
updating 568
military service 388
military service availability 346
Military Service component (MIL_SERVICE_DEFN) 29
Military Situation (FRA) page 388
Move Assignment page 571, 572
multiple actions
entering multiple actions with same effective date 558
multiple actions with same effective date 627
multiple jobs
applying regulatory contribution limits 102
benefits credits and the primary job 104
calculating benefit deductions 101
calculating percent of gross deduction limits 102
comparing to multiple employee record numbers 95
designating primary job 100
determining eligibility 102
effect on PeopleSoft Benefits Administration 102
effect on PeopleSoft Payroll for North America 105
effect on PeopleSoft Pension Administration 106
example 98
grouping jobs to determine benefits eligibility 101
marking events for reprocessing 105
maximum number 101
passive events 105
PeopleSoft Pension Administration and the primary job record 106
PeopleSoft Pension Administration eligibility process 106
triggering events 104
understanding 87, 95
understanding employee record numbers (ERNs) 91
using with PeopleSoft Human Resources 99
using with PeopleSoft Human Resources: Base Benefits 100
viewing summary data 585
Multiple Jobs page 585

N

Name page 316, 317
names
entering 112
Nation Duvo Table (DEU) page 55, 56
Nation Duvo table component (NATION_DUVO_TABLE) 53
NATION_DUVO_TABLE component 53
national identifications
entering 114
(NEE_PROVIDER_TBL\ component 34
Netherlands
complying with the SAMEN diversity law 58
entering SAMEN diversity 390
First Day Notification 232
setting up SAMEN countries 58
verifying the Social Security ID for Dutch persons 115
viewing dependent and beneficiary data 328
New Employment Instance USF component

Copyright © 1988-2006, Oracle. All rights reserved.

CI Exceptions page 278
Employment 2 page 275
Financial Disclosure page 277
Non Pay Data page 277
Probation Dates page 276
New Zealand
setting up disability codes 67
NFC document types
setting up 685
NFC Document Types
setting up 685
NFC Import Document Types component (GVT_NFC_DOC_TYPE) 685
NFC Import Process Parameters component (GVT_NFC_DOC_LIST) 686
NFC Job Information USF page
Add Employment Instance USF component 261
NFC Populate Amount Indicator (USF) Award Data 14
NFC Processing
understanding 679
NFC SINQ Import page 689
NFC SINQ Import Process
run control page 689
NFC SINQ Import process parameters
setting up 686
NFC SINQ Import Process Parameters pages 687
NFC System UserIds page 687, 688
Node Mapping page 414, 419
Node Selection page 453, 457
Node Table page 414, 415
Non Pay Data (USF) page 245, 277
non-employee, *See* contingent worker
Non-Employee Provider component (NEE_PROVIDER_TBL) 34
nonpay status 277
notes xxix
Notification of Personnel Action (SF-50) 612
Notification Results page 233, 235

O

OCC_ILLNESS_FRA component 47
occupational illness (FRA) 52
Occupational Illness (FRA) page 49, 52
Occupational Illness component (OCC_ILLNESS_FRA) 47
OEE Groups by Employment Type (CAN) page 385
OEE Groups by OCC Group (CAN) page 385
OEE Groups/Jobs Filled/Vacated (CAN) page 385
OEE Workforce Survey (CAN) page 385, 386
OEE workforce survey responses 386
OEE Workforce Survey Stats (CAN) page 385
official languages 386
Official Languages (CAN) page 385, 386
Official List (ESP) page 579
Order Codes component 346
Order Codes page 347
organization plan 517
creating 513
Organization Plan Checklist page 525
organization plan checklist, creating 525
Organization Plan page 513
organizational instance
adding 133
updating 570
organizational relationships
creating 126
example 89
reviewing 208
understanding 87
understanding employee record numbers (ERNs) 91
understanding organizational instances 88
Organizational Relationships page 111, 126
organizational structure
tree manager 513
Original Contract Data page 286
Other Pay Information (USF) page 244, 267
Other Phone Numbers page 332
Overview 1

P

PACT SINQ assignments
working with 695
PAR 601
See Also personnel action requests (USF)
PAR Remarks (USF) page 242, 247
Parameters (SGP) page 551

Copyright © 1988-2006, Oracle. All rights reserved.

Parameters page - Notice of Personnel Action USF 611, 612
Parameters page - Refresh Employees Table 587
Parameters page - Request Personnel Action USF 611, 612
passive events
multiple jobs 105
Passport/Visa Expiration page 335
paternity leave 633
Pay Rate Change component 575
pay rate changes 575
updating job data 560
payees
entering bank account information 341
payroll
effective of multiple jobs on PeopleSoft Payroll for North America 105
Payroll page 149, 175, 203, 556
payroll processing data 175
payroll status
personnel actions 553
PDF Form Definition page 453, 454
Pending Future Actions page 578
pension
effect of multiple jobs on PeopleSoft Pension Administration 106
multiple jobs and the eligibility process 106
multiple jobs and the primary job record 106
PeopleBooks
ordering xxvi
PeopleCode, typographical conventions xxviii
PeopleSoft Payroll for North America
multiple jobs 105
PeopleSoft Pension Administration
multiple jobs 106
multiple jobs and the eligibility process 106
multiple jobs and the primary job record 106
PER001 578
PER002 551
PER003 579
PER005 578
PER006 551
PER007 579
PER010 579
PER015 578
PER020 551
PER021 578
PER029 588
PER038NL 390
PER039GR 300
PER053 396
PER054ES 579
PER058 579
PER060 300
PER063JP 580
PER064JP 580
PER066JP 580
PER100CN 232
PER103CN 385
PER104CN 385
PER105CN 385
PER106CN 385
PER710 7
PER801SG 551
performance awards 629
permits, *See* visas and permits
person
adding 88
Person Applicant Information page 152
person checklist 197
Person Checklist page 152, 197
Person component
tracking addresses 115
tracking biographical history 113
tracking email addresses 116
tracking names 112
tracking national identifications 114
tracking phone numbers 116
Person ID field names, defining 539
person IDs (identification)
assigning 109
person information, updating 531
Person Match Found page 221, 226
person of interest
adding 133
understanding a POI with a job 88
understanding a POI without a job 88
understanding employee record numbers (ERNs) 91
understanding organizational instances 88
understanding POI relationships 87
Person Org Summary page 208
person pages

Copyright © 1988-2006, Oracle. All rights reserved.

Contact Information page 115
Person pages
Biographical Details page 111
Person Rules page 19, 26
personal data
changing 532
refreshing Personal Data table 587
running reports 551
understanding personal data for employees, contingent workers, and people of interest 88
understanding types 548
updating 547
viewing (USF) 596
Personal Data (USF) page 242, 249, 596
personal data reports 551
personal information 115
Personal Phone Numbers (USF) page 242
Personal Profile page 316, 320
Personal/Job Data (ITA) page 393
personnel action history reports 614
personnel action reasons
defining 5, 10
defining for Canadian actions 11
defining for German actions 12
global assignments 6
positions 6
understanding 5
personnel action requests (USF)
adding and updating data 604
administering 601
affecting employee status 624
authorizing and approving 608
automatically routing the PAR 604
cancellation, correction, or withdrawal 605
correcting or canceling actions 609
disapproving or returning 605
Human Resources processing 609
identifying PAR status codes and definitions 606
performing common 628
printing a Notification of Personnel Action (SF-50) 612
printing an action request (SF-52) 612
process diagram 604
processing actions 608
processing new requests 608, 621
requesting multiple actions with the same effective date 627
running reports 614
selecting a PAR status 604
system features 601
tracking and routing a PAR request through reviews and completion 603
understanding 601, 621
viewing employee data summaries 614
personnel actions
creating checklists for 38
defining 7
effect on status 553
Personnel Actions History page 578
personnel records
locating 282
See Also contingent data; employee data
updating 534
phone numbers
entering 116
Phone Numbers page - Personal Profile 317
photographs 354
PIS 82
placement plans
overview 511
PMSO SINQ assignments
working with 696
POIs
understanding person of interest relationships 87
without jobs, security for 128
Position (USF) page 244, 263
positions
action reasons 6
assigning employees (USF) 279
changing a worker's 566
entering (USF) 255, 263
hiring 152
preliminary employment data forms 279
prerequisites xxv
PREV Codes (ITA) page - Company Codes 61
PREV Codes (ITA) page - Company/Estab Codes 61
PREV_TBL_ITA component 59
primary job
benefits credits 104
designating for multiple jobs 100
multiple jobs and PeopleSoft Pension Administration 106

Copyright © 1988-2006, Oracle. All rights reserved.

Primary Job Audit page 579
primary pay group
multiple jobs 105
Print Contracts page 453, 463
Print ES-931 (USF) page 616, 619
Print I-9 Forms page 399, 407
printed documentation xxvi
printing contracts (ESP) 448, 451
batch contract printing process 463
creating PDF form definitions 454
defining PDF form details 456
generating and printing contracts for employees 459
mapping contracts to XML nodes 453
mapping PDF form details to XML nodes 457
reviewing and editing contract data 461
prior work experience 352
Prior Work Experience page 350, 352
probation dates 276
Probation Dates (USF) page 276
probation terminations (USF) 641
Process Credit Card Data Encryption page 310, 311
Process Leave Bank/Transfer (USF) page 667, 670, 672
Process Leave Bank/Transfer (USF), viewing data 673
process requests
ad-hoc 587
as-of date 587
calendar year 587
from/thru dates 587
Productive Unit (ITA) page 62
Productive Unit component (UNITA_PROD_TBL) 59
Programa de Integração Social (PIS) 82
Promote Assignment page 571
promotions
entering 558
entering (USF) 631
Property Value page 313, 314
protected job leave 371
Protection (BEL) page 370, 371
Provider Info page 35

Q

Query Viewer page 525
quoted pay 269

R

RAIS 83
Rate Code subpage 589
RC_AA_JOBCODE_JPN component 478
Reactivate/Termination Update page 297, 298
REAS_END_TBL_BEL component 361
Reason Summary component (ACTION_TBL) 5
Reason Summary page - Actions 7
Reassignment Reasons component (MIL_REASSGN_RSN) 346
Reassignment Reasons page 347
reassignment requests (USF) 632
recipient accrual balances (USF), viewing 673
record processing exception, defiining 540
RED_CHRG_TBL_BEL component 361
Reduced Charged Table (BEL) page 362
Reduced Charged Table component (RED_CHRG_TBL_BEL) 361
Refresh Names and Profiles MIL page 569
Refresh Personal Data Table 587
Regional page 111, 116, 549
rehiring employees
entering requests (USF) 635
rehiring workers
entering 566
Relação Anual de Informações Sociais (RAIS) 83
related documentation xxvi
RELIGION_TBL_FA component 66
RELIGION_TBL_GBL component 34
Religions component (RELIGION_TBL_GBL) 34
Religions MYS/SGP component (RELIGION_TBL_FA) 66
Religions MYS/SGP page 66
Religions page 35
replacement contracts 367
Report (BEL) page 373, 378
reporting
effect of multiple jobs 99
reports
Action Reason Table 7

Copyright © 1988-2006, Oracle. All rights reserved.

Appointment Affidavit (SF61 Report) (USF) 280
Award Type Table 13
CAGED (BRA) 229
Contract Information 286
Database Audit 588
Disability Report (ITA) 300
Employee Birthdays 551
Employee Home Address Listing 551
Employee Listing 551
Employee Registry (BRA) 229
Heavily Disabled (DEU) 300
Hire List (CAN) 232
ITA Equal Opportunities 396
job data 578
NLD Law SAMEN Statistics 390
OEE Groups by Employment Type 385
OEE Groups by Jobs Filled/Vacatd 385
OEE Groups by OCC Group 385
OEE Work Force Survey Stats 385
Preliminary Employment Data form (SF-75) (USF) 280
Temp Assignment due to Complete 297
Temp Assignment w/out End Date 297
responsible parties 80
Results (BEL) page 373, 376
retirement
entering 564
entering requests (USF) 634
requesting supplemental/correction individual retirement records (USF) 634
retirement date calculation (GBR) 124
Review AFI Files page 465, 474
Review Notification (BEL) page 379, 380
Reviewed check box
PAR Data Control page 610
RSZ Category Table (BEL) page 362, 365
RSZ Category Table component (CONTR_RSZS_BEL) 361
RUN_FGPER810 component 12
RUN_PER710 component 5

S

salary ceiling information (FRA) 50
salary changes, for promotions (USF) 631
Salary Components page 589, 593
Changes tab 595
Controls tab 594
Conversion tab 595
salary history 593
Salary Plan page 149, 179, 203, 556, 575
salary plans, employee information 179
SAMEN Country Table (NLD) page 58
SAMEN Country Table component (SAMEN_CNTRY_NLD) 58
SAMEN diversity information
establishing ethnic status 391
running the LAW SAMEN Statistics report 392
understanding 390
SAMEN diversity law 58
SAMEN Registration (NLD) page 390, 391
SAMEN_CNTRY_NLD component 58
savings plans
applying regulatory contribution limits for multiple jobs 102
Scheme (ESP) page 68, 70
SCRTY_INSTALL component 482
SCRTY_TYPE2_TBL component 482
Search by National ID page 282, 284
Search for People page 282
SEC_CLR_TYP_TBL component 37
Sections page 19, 25
security
departmental reassignments (USF) 633
employee data (USF) 628
for intercompany transfers (shukkou) 508
for job data 143
setting up for tracking additional appointments 482
updating job data 553
security clearance
setting up and tracking 354
Security Clearance page 355
Security Clearance Type component (SEC_CLR_TYP_TBL) 37
Security Clearance Type page 38
security clearance types, defining 38
security clearance, tracking 357
Security Install Settings component (SCRTY_INSTALL) 482
Security Install Settings page 484
Security Type Table component (SCRTY_TYPE2_TBL) 482
Security Type Table page 484
SEFIP 83
Select an Action page 221

Copyright © 1988-2006, Oracle. All rights reserved.

Select Data page - Notice of Personnel Action USF 611
Select Data page - Request Personnel Action USF 611
SENIORIT_NOTIF_ITA component 59
seniority for Claeys Formula calculations 370
Seniority Notification (ITA) page 62, 64
seniority notification periods (ITA) 64
Service Components component (MIL_SVC_COMPONENT) 29
Service Components page 31
Service Definition page 31
Service Ranks page 31, 32
setting up 414
setting up hire template
  Configuration page 23
setting up hire templates
  defining template records and fields 19
  defining template sections 20
  Person Rules page 26
  Sections page 25
setting up XML files (ESP) 411
Setup Wage/Separation USF – Annual Leave (USF) page 617
Setup Wage/Separation USF – Identification (USF) page 616
Setup Wage/Separation USF – Severance Pay (USF) page 618
severance calculations 369, 376
Severance Pay (USF) page - Setup Wage/Separation USF 616
SF-75 Run Control (USF) page 280
SF61 Report (USF) page 280
shukkou, *See* intercompany transfers (shukkou)
SI Unit (DEU) page 55
SI Unit component (SI_UNIT_GER) 53
SI_UNIT_GER component 53
Signature Date/Probation Info page 286, 294
Singapore
  assigning festive advance types 191
  setting up religions 66
single check
  multiple jobs 105
SINQ
  administration
    PACT and PMSO SINQs 691
SINQ assignments
  working with 694
Sistema Empresa de Recolhimento do FGTS e Informações à Previdência Social (SEFIP) 83
Skill Grades component (MIL_SKL_GRD_DEFN) 29
Skill Grades page 31
Soc Sec Risk Code (ESP) page 68
Social Insurance Numbers 114
Social Report (BEL) page 382
social security (ESP)
  defining bases 71
  defining contribution rates and percentages 73
  defining maximum and minimum ceilings 70
  entering country codes for reporting 69
  viewing risk codes 70
social security ceiling information (FRA) 50
social security company (ESP) information, entering 75
Social Security Company Setup component (SOCS_SETUP_ESP) 67
Social Security Country Code component (SOCS_CNTRY_ESP) 67
Social Security Country Codes (ESP) page 68, 69
Social Security Data (ESP) page 69, 76
Social Security Data component (SSEC_DATA_ESP) 67
Social Security ID 115
Social Security Risk Code (ESP) page 70
Social Security Risk Code component (SOCS_RISKCD_ESP) 67
Social Security Scheme component (SOCS_SCHEME_ESP) 67
social security time limit (ESP), defining 76
social security tracking codes 48
SOCS_CNTRY_ESP component 67
SOCS_RISKCD_ESP component 67
SOCS_SCHEME_ESP component 67
SOCS_SETUP_ESP component 67
Spain
  creating company inquiries on the AFI report 473
  creating employee inquiries on the AFI report 472
  creating the AFI file 470

Copyright © 1988-2006, Oracle. All rights reserved.

defining action reason codes 12
defining hiring centers 77
defining social security time limit 76
entering country codes for social security reporting 69
entering insurance company information 70
entering social security company information 75
generating AFI flat files 463
maintaining detailed employee AFI data 467
maintaining employee AFI data 465
reviewing employee data on AFI files 474
setting up social security 70, 71, 73
setting up workforce tables 67
Spanish reporting (ESP), managing 411
Specify Net Pay Elections page 341
SSEC_DATA_ESP component 67
status
personnel actions 553
Statute Table (BEL) page 362, 364
Statute Table component (STATUTE_TBL_BEL) 361
STATUTE_TBL_BEL component 361
substantial presence test 408
Substantial Presence Test (USA) page 408
Substantial Presence Test page 408
substantive jobs
suspending for temporary assignments 295
understanding 295
suggestions, submitting xxx
supervisor levels 34
Supervisor Levels component (SUPVSR_LVL_TBL) 34
Supervisor Request (USF) component 603
See Also personnel action requests (USF)
SUPPORT_DOC_TABLE component 28
Supporting Documents Table component (SUPPORT_DOC_TABLE) 28
Supporting Documents Table page 28
Supvsr Lvl Tbl page 36
SUPVSR_LVL_TBL component 34
Switzerland, running the Company Statistics report 387

T

Tamatsuki data, transferring to the job record 523
Tamatsuki Placement Check List page 517, 522
Tamatsuki placements, listing 522
Tamatsuki to Transfer Record page 517, 523
Tamatsuki Transfer Candidate Entry page 517, 521
Tamatsuki transfer candidates, selecting 521
Tamatsuki Transfer Entry page 517, 521
Tamatsuki transfers, entering 521
tamatsuki, overview 511
TAS001 297
TAS002 297
Task Order Information page 286, 293
Temp Assignment w/out End Date page 297
Temp Assignmt Due to Complete page 297
TEMP_DUTIES_TBL component 34
template administrator 17
Template Category Table component (HR_TBH_CTG_TBL) 14
Template Category Table page 18, 22
Template Creation component (HR_TBH_CREATION) 14
Template Creation page 18, 23
Template Hire Status page 221, 226
Template Record/Field component (HR_TBH_RECDEFN) 14
Template Record/Field Setup page 18, 19
Template Section component (HR_TBH_SECDEFN) 14
Template Section Field Configuration page 18, 22
Template Section Setup page 18, 20
Template-Based Hire page 220, 222
template-based hire templates, setting up 14
template-based hires
increasing the workforce 208
understanding 209
temporary assignments
data processing considerations 296
entering 295, 297
partial 298

Copyright © 1988-2006, Oracle. All rights reserved.

running the update process 298
understanding 295
Temporary Data Cleanup page 525, 528
Temporary Duties component (TEMP_DUTIES_TBL) 34
Temporary Employees page 579
tenure conversions (USF) 643
career-conditional conversions 644
process overview 643
understanding 644
viewing supervisor notifications 644
terminations
due to death 565
entering 564
entering requests (USF) 634
requesting terminations due to death (USF) 634
running probation termination automatic actions (USF) 641
terms 697
Time and Labor Data (USF) page 245
Transfer Data Maintenance page 517, 523
transfer data, deleting and maintaining 523
Transfer Entry by Department page 517, 518
Transfer Entry with Trees page 517, 519
transfers 559
Transfers After Organization Change 527
transfers, leave, *See* leave transfers (USF)
Tree Manager page 513
triggering events, triggering events multiple jobs 104
TRV_ACTREAS_ITA component 59
Turnover Action (ITA) page 62
Turnover Action component (TRV_ACTREAS_ITA) 59
typographical conventions xxviii

U

U.S. Federal Hiring, Add Employment Instance USF 237
union dues, multiple jobs 105
union membership 175
UNITA_PROD_TBL component 59
United Kingdom
entering a worker's building society details 344
entering banking information 342
understanding the retirement date calculation 124
United States
determining residency status for foreign nationals 408
entering COBRA action reason data 11
reporting to Government Agencies when the social security number is unknown 115
reviewing union membership 175
United States Federal
action request (SF-52) 612
adding an employment instance 237
administering automatic leave enrollment 651
See Also automatic leave enrollment (USF)
administering personnel action requests 601
See Also personnel action requests (USF)
administering probation terminations with automatic actions 641
administering tenure conversions 643
See Also tenure conversions (USF)
administering within-grade increases 645
defining award actions 12
employee data security considerations 628
generating a wage and separation report 615
See Also ES-931
initiating and requesting personnel actions 608
managing leave transfer programs
See Also leave transfers (USF)
administering leave donations 666
administering leave recipients 670
setting up leave transfer programs 660
viewing leave transfer data 673
National Finance Center 679
See Also processing SINQs (USF)
printing appointment affidavits and preliminary employment data forms 279
processing automatic actions 637
See Also automatic actions (USF)

Copyright © 1988-2006, Oracle. All rights reserved.

processing personnel action requests 621
understanding workflow 603
using the Personnel Action Request (PAR) process to hire employees 239
viewing employee benefit programs 598
viewing employee data summaries 614
viewing job data 597
viewing personal data 596
United States Federal (USF) employees
entering compensation information 265, 267
entering current and historical employment information 271
entering financial disclosure information 277
entering job tracking information 248
entering PAR remarks 247
entering personal information 249
entering position information 263
entering retirement data 258
specifying benefit programs 257
tracking information for employees on assignment 261
viewing component interface exceptions 278
viewing expected pay 268
viewing job earnings distributions 270
Unknown Social Security ID 115
Unprocessed Transactions page 691, 693
update components 552
job data 532
personal data 532
Update Personal Data-Future page 111
URSSAF Table component (URSSAF_TABLE_FRA) 47
URSSAF Table page
FRA 49
URSSAF_TABLE_FRA component 47
USF, *See* United States Federal (USF)
(USF) Adding an Employment Instance
U.S. Federal government hiring 240

V

veterans 252
Veterans Info (USF) page 243, 252, 596
Visa/Permit Data page 335, 337
Visa/Permit Table component (VISA_PERMIT_TABLE) 28
Visa/Permit Table page 28
VISA_PERMIT_TABLE component 28
visas, *See* visas and permits
visas and permits
defining 28
entering 337
entering for dependents 330
managing data 334
tracking 336
visual cues xxix
VLTP 652
Voluntary Leave Transfer Program 652
volunteer activities 345
Volunteer Activities page 345
Volunteer Organization Table page 36
Volunteer Organizations component (VOLUNTEER_ORG_TBL) 34
VOLUNTEER_ORG_TBL component 34

W

Wage and Separation report (USF) 615
warnings xxix
WBEAA Data - NLD page 390, 392
WGI, *See* within-grade increases
WGI Action (USF) page 640, 641
WGI Notice (USF) page 640
within-grade increases
administering for US Federal use 645
creating supervisor notifications 647
entering data that affects WGI automatic actions 648
process overview 647
running the Load Within Grade Increases process 641
understanding 60 day WGI notices 645
understanding the Load Within Grade Increases process 646
viewing supervisor notifications 648
work experience 352
Work Group (ESP) page 68, 71
Work Location page 147, 152, 202, 556, 571
work permits and visas 28
See Also visas and permits
worker images 354
workflow
for personnel action requests (USF) 603
updating person addresses 550

Copyright © 1988-2006, Oracle. All rights reserved.

workforce
hiring contingent workers 133
hiring employees 133
increasing 133
workforce contracts
adding basic information 286
adding signature date and probation information 294
adding special clauses 289
generating the Contract Information report 295
setting up, *See* contracts
tracking 284
workforce data
entering 349
entering employee images 349
record badge numbers 349
tracking business expenses 349
tracking prior work experience 349
workforce information
updating 531
viewing 589
Workforce Job Summary page
Compensation tab 592
General tab 590
Job Information tab 590
Military Information tab 592
Salary Plan tab 591
usage 589
viewing 590
Work Location tab 591
workforce tables, setting up (DEU) 53
workforce tables, setting up (ESP) 67
workforce tables, setting up (FRA) 47
workforce tables, setting up (ITA) 59
Worn Rank Types component (MIL_WRN_TYPE_DEFN) 29
Worn Rank Types page 31

X

XML Code Table page 414
XML code tables (ESP) 414
described 412
XML Confirm page 447
XML files (ESP)
batch contract printing process 463
confirming the sending of 446
contract generation 451
contract mapping, described 413
contract printing mapping 413
creating PDF form definitions 454
defining 427
defining PDF form details 456
generating and printing contracts for employees 459
generating for Contrata reporting 428
managing response files 433
mapping contract types to XML nodes 453
mapping contracts to XML nodes 422
mapping PDF form details to XML nodes 457
previewing XML files 432
printing contracts 448
reviewing and editing contract data 461
setting up 411
viewing Contrata errors 433
XML node tables (ESP)
described 412
setting up 415
setting up node mapping 419
XML Preview ESP page 427, 432
XML Preview page 440, 445
XML Set Table page 414, 415
XML sets (ESP)
defining 415
described 412
XML Template page 414, 421
XML templates (ESP)
defining 421
described 413

Y

Years of Service page 579

Copyright © 1988-2006, Oracle. All rights reserved.