
PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Salary Packaging

December 2006

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About This PeopleBook Preface

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

This preface discusses:

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

Note. PeopleBooks document only elements, such as fields and check boxes, that require additional explanation. If an element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft Enterprise applications are defined in this preface.

PeopleSoft Enterprise Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft Enterprise applications.

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft Enterprise menus, pages, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft Enterprise applications most effectively.

Application Fundamentals

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

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

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

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

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft 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 <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (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 ().

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.

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.

Once, Always, and Don't Run	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	An ID that represents a set of selection criteria for a report or process.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.
User ID	An ID that represents the person who generates a transaction.

PeopleSoft Enterprise Human Resources Administer Salary Packaging Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Enterprise HRMS Application Fundamentals.
- PeopleBook structure.

PeopleSoft Products

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

PeopleSoft Enterprise HRMS Application Fundamentals

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

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook

PeopleBook Structure

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

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

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

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

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

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

CHAPTER 1

Getting Started with Administer Salary Packaging

This section discusses:

- Administer Salary Packaging overview.
- Administer Salary Packaging business processes.
- Administer Salary Packaging integrations.
- Administer Salary Packaging implementation.

Administer Salary Packaging Overview

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

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

Administer Salary Packaging Business Processes

Administer Salary Packaging supports the following business processes:

- Modelling Salary Packages for Employees.

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

- Modelling Salary Packages for Applicants.

If you have been tracking and administering job applicants using PeopleSoft Enterprise Recruiting Solutions, you don't have to re-enter all of the information you have already entered in the system when you hire an applicant. After the applicant is hired and you have created the applicants, the system can copy the applicant's information into the applicant's employee record.

- **Reviewing Salary Packages.**

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

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

- **Enrolling in Salary Packages.**

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

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

See Also

[Chapter 4, "Modelling Salary Packages," Modelling Salary Packages for Employees, page 40](#)

[Chapter 4, "Modelling Salary Packages," Modelling Salary Packages for Applicants, page 56](#)

[Chapter 5, "Managing Salary Packages," Reviewing Salary Packages, page 65](#)

[Chapter 5, "Managing Salary Packages," Enrolling in Salary Packages, page 63](#)

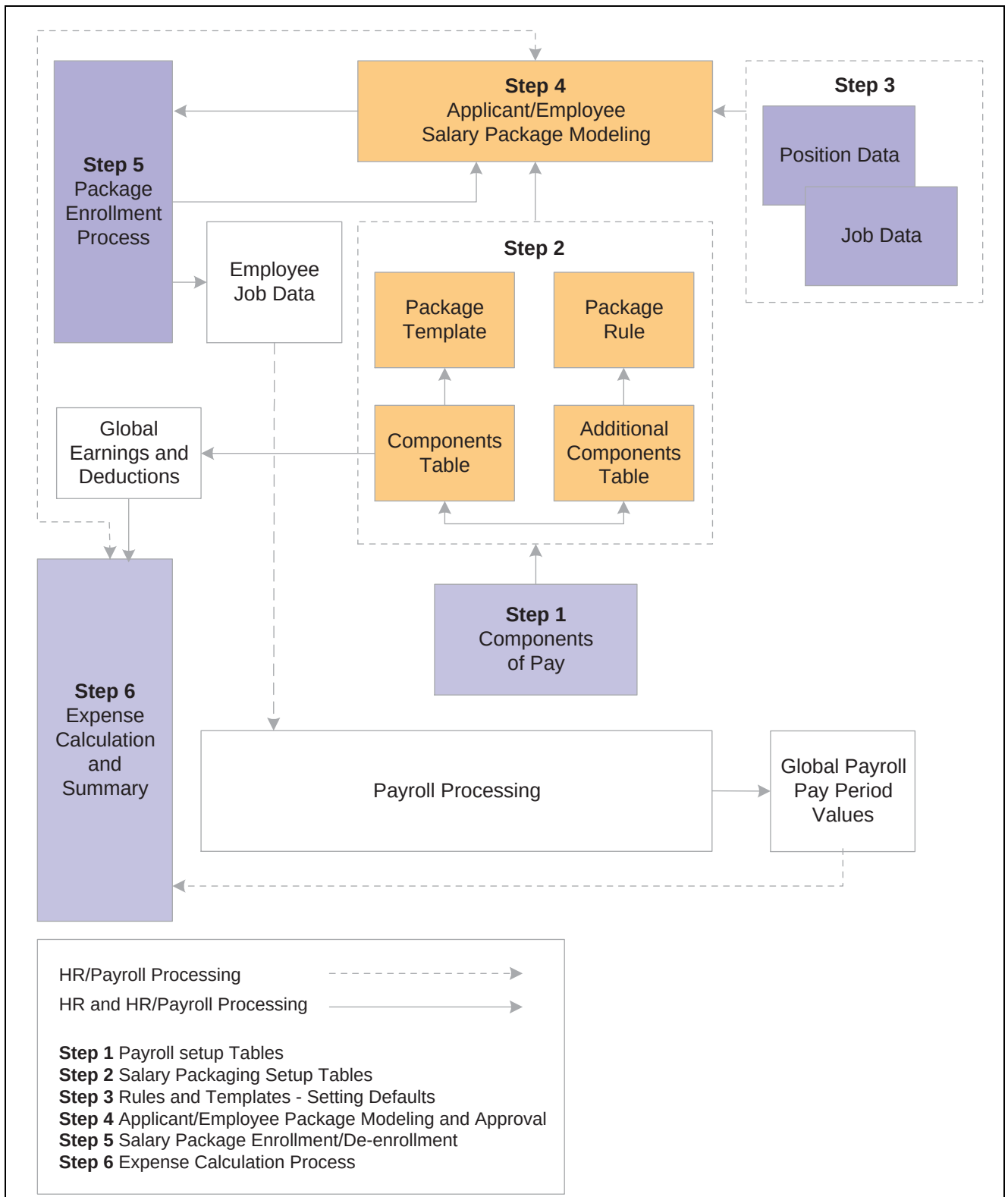
Administer Salary Packaging Integration

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

Salary packaging requires base table data definition in two parts:

- General Human Resources and Global Payroll information.
- Salary packaging components and additional components.

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



Salary Packaging, Human Resources, and Payroll integration

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

- To facilitate the maintenance of payroll data through the package enrolment process.

- To track expenditure against components in the package expense summary processes.

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

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

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook

Administer Salary Packaging Implementation

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

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “PeopleSoft Enterprise HRMS Application Fundamentals Preface”

Enterprise PeopleTools PeopleBook: PeopleSoft Setup Manager

CHAPTER 2

Understanding Administer Salary Packaging

This chapter provides an overview of Administer Salary Packaging and discusses:

- Designing your salary packaging system.
- Setting up support tables and salary packages.

Designing Your Salary Packaging Program

The Administer Salary Packaging business process in Human Resources offers salary packaging functionality for Australia.

The core of Administer Salary Packaging includes six main phases of operation:

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

Setting Up Support Tables and Salary Packages

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

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

Table	Definition
Deduction Elements (GP)	Set up the way the system processes deductions, including the priority of the deduction and how the deduction affects taxes. Used for expense tracking.
Comp Rate Code Table - Comp Rate Code Table (HR) (compensation rate code table)	Select the <i>Maintained via Package Only</i> check box in the Australian Salary Packaging group box to define and review your compensation rate codes. Rate codes are attached to salary package components and are enrolled on the employee's Job Data - Compensation page. If the rate code is managed by salary packaging, the rate matrix functionality cannot be used.
Ern/Ded Included (GP) (included earnings/deductions)	Select the nonpackaged earnings and deductions elements that appear on the Package Summary component after you run the expense calculation process.
Business Expenses (GP)	Enter actuals for salary packaging components defined as an expense payroll type. You must have a unique expense code for each package component to facilitate reconciliation of package expenditure.
Position Data - Description page and Job Code Table - Job Code Profile	Attach the default package rule and template that you use when modelling your packages to a job code or a position. The defaults on the position override the defaults on the job code.
Company Table — Default Settings	To specify a default compensation rate code for TPV and TEC for a specific company to use when modelling applicant/employee packages, use the Company Table - Default Settings page.
Pay Groups AUS	When you are defining calendars for salary packaged employees, the pay frequency comes from the value you enter in the Pay Frequency field in the Salary Packaging group box. This group box enables you set up default pay frequencies for the pay groups you use as part of Salary Packaging. The frequency you select is also retrieved by the Package Calendar Table page, which enables the budgeting capabilities in the actual salary package because the system needs to know over what type of frequency to divide the component totals.
FBT/GST Rate Table	View the FBT and GST rates for Australia. The GST percentage and rate for the calculation of Fringe Benefits Tax (FBT) appear.
FBT Stat Interest	View FBT statutory interest rates. The statutory percentage rate used in the calculation of interest payments for depreciation of motor vehicles and low interest loans appear.

Table	Definition
FBT Vehicle Rates	Review FBT motor vehicle statutory percentage information. The kilometre thresholds and the corresponding statutory percentages used in determining the taxable value of a motor vehicle appear.
PAYG State Payroll Tax	Specify the payroll tax percent rate for all states where employees in a specific company are located. This page provides maintenance functions for the State Payroll Tax tables. These percentages are used in the notional calculation of tax during package modelling.
Tax Scales	Maintain tax scales used in package calculations. Set up and view the thresholds and the percentage of tax for each threshold. Use if you have Human Resources only installed.
Additional Components	Define the liabilities associated with each of your salary packaging components. Determine the level of package remuneration in which to include these liabilities—Total Package Value (TPV) or Total Employment Cost (TEC).
Package Components — Base Component	Set up basic information about the salary package component.
Package Components — Additional Component	Associate additional components with a salary package component.
Package Components — Calculated Component	Define contributing components. To assist in the accurate calculation of components dependent on the value of other components, define the calculation starting point and the other components that affect the value on the Expense Data page.
Expense Data	If you are planning on tracking expenditure (the package expense calculation) and you have Global Payroll installed, specify package component expenses information for each component. Enter the details and identify the payroll types and related data to track expenditures against package components.
Package Template	Define salary package templates. Define a standard collection of package components that are automatically defaulted into package model records for employees or applicants.

Table	Definition
Package Rule	Create salary package rules. PeopleSoft applies package rules to validate the package models when you save them.
Pay Groups AUS	When you are defining calendars for salary packaged employees, the pay frequency comes from the value you enter in the Pay Frequency field in the Salary Packaging group box. This group box enables you set up default pay frequencies for the pay groups you use as part of Salary Packaging. The frequency you select is also retrieved by the Package Calendar Table page, which enables the budgeting capabilities in the actual salary package because the system needs to know over what type of frequency to divide the component totals.

CHAPTER 3

Setting Up Salary Packaging

This chapter provides an overview of salary packaging setup and discusses how to:

- Set up salary packaging Human Resources and Global Payroll tables.
- Set up and view salary packaging tax options.
- Set up additional salary package components.
- Set up package components.
- Set up salary package templates.
- Set up salary package rules.
- Set up salary package defaults.

Understanding Salary Packaging Setup

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

To set up Administer Salary Packaging:

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

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

- Pay Calendar Table - GP or Pay Calendar Table - HR.

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

- Earnings Element (GP).

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

- Deductions Element (GP).

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

- Compensation Rate Code Table (HR).

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

- Ern/Ded Included.

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

- Business Expenses (HR).

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

2. Set up your Salary Packaging tables.

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

3. Set up your default rules and templates.

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

4. Model and approve your applicant/employee packages.

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

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

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

6. Run the expense calculation process (GP).

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

Setting Up Salary Packaging Human Resources and Global Payroll Tables

To set up salary packaging payroll components, use the Pay Calendar-GP (PKG_CALENDAR_GP), Pay Calendar-HR (PKG_CALENDAR_TBL), the Comp Rate Code Table (COMP_RATECD_TBL), and the Included Earnings/Deductions (PKG_ERN_DED_INCL) components.

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

- Define calendars for salary packaged employees.
- Set up Administer Salary Packaging compensation rate codes.
- Define non-salary packaged earnings and deductions elements.
- Define pay frequencies for salary packaging.

See Also

Chapter 1, “Getting Started with Administer Salary Packaging,” Administer Salary Packaging Integration, page 2

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Compensation and Budgeting, “Viewing and Reporting Summary Salary Data,” Viewing Worker Ranking

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, “Defining Earning and Deduction Elements”

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook

Understanding Global Payroll and Human Resources Data Used in Salary Packaging

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

Understanding Salary Packaged Earnings and Deductions

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

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

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, “Defining Earning and Deduction Elements”

Chapter 3, “Setting Up Salary Packaging,” Defining Non-Salary Packaged Earnings and Deductions Elements, page 15

Chapter 3, “Setting Up Salary Packaging,” Defining Expense Details for Salary Packaged Components, page 32

PeopleSoft Enterprise Global Payroll for Australia 9.0 PeopleBook, “Monitoring Salary Packaging Expenditure”

Understanding Salary Packaging Business Expense Codes

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

Note. Monitoring expenditure for Administer Salary Packaging is possible only if you are using Global Payroll.

See Also

[Chapter 1, “Getting Started with Administer Salary Packaging,” Administer Salary Packaging Integration, page 2](#)

PeopleSoft Enterprise Global Payroll for Australia 9.0 PeopleBook, “Monitoring Salary Packaging Expenditure”

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, “Entering Additional Data in Human Resources Records,” Tracking a Worker’s Business Expenses

Pages Used to Set Up Salary Packaging Human Resources and Global Payroll Tables

Page Name	Object Name	Navigation	Usage
Pay Calendar-GP - Pay Calendar Table	PKG_CALENDAR_TABLE	Compensation, Salary Packaging AUS, Define Salary Packaging, Pay Calendar-GP, Pay Calendar Table	Create pay calendars for your salary packaged employees in specific pay groups. Used for package modelling so that it can determine the budget values on the employee’s package. Note. Use only if you have <i>both</i> Global Payroll and Human Resources installed.
Pay Calendar-HR - Pay Calendar Table	PKG_CALENDAR	Compensation, Salary Packaging AUS, Define Salary Packaging, Pay Calendar-HR, Pay Calendar Table	Create and schedule pay calendars for your salary packaged employees in specific pay groups. Used for package modelling so that it can determine the budget values on the employee’s package. Note. Use if you have Human Resources installed.
Comp Rate Code Table (compensation rate code table)	COMP_RATECD_TBL	Set Up HRMS, Foundation Tables, Compensation Rules, Comp Rate Code Table, Comp Rate Code Table	Define compensation rate codes. See <i>PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Base Compensation and Budgeting</i> , “Viewing and Reporting Summary Salary Data,” Viewing Worker Ranking.

Page Name	Object Name	Navigation	Usage
Ern/Ded Included	PKG_ERN_DED_INCL	Compensation, Salary Packaging AUS, Define Salary Packaging, Included Earnings/Deductions, Ern/Ded Included	Specify the non-packaged earnings and deductions elements that appear on the Package Summary component after you run the expense calculation process.
Pay Groups AUS	GPAU_PYGRP_EXT	Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Framework, Organizational, Pay Groups AUS, Pay Groups AUS	Define additional information specific to Australian pay groups, such as the pay frequency for salary packaging. The frequency you select enables the budgeting capabilities in the actual salary package, selecting the frequency lets the system know the type of frequency to divide the component totals <i>See PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Defining the Organizational Structure," Defining Pay Groups.</i>
Earnings and Deduction	GPAU_PSLP1	Set Up HRMS, Product Related, Global Payroll & Absence Mgmt, Payslips, Templates AUS, Earnings and Deduction	Create sections of earnings and deductions, select description options, and set the element components that the payslip displays. This information interrelates to salary packaging setup as well.

Defining Calendars for Salary Packaged Employees

Access the Pay Calendar Table page.

Pay Calendar Table

Pay Group: GAMONTHLY Monthly Pay Group

Calendar Generation Parameters

Pay Frequency: Monthly

Begin Date: 07/01/2006

End Date: 12/31/2006

Generate Calendar

Pay Periods

Customize | Find | View All

First 1-5 of 6 Last

Pay Period Begin Date	Pay Period End Date		
07/01/2006	07/31/2006	+	-
08/01/2006	08/31/2006	+	-
09/01/2006	09/30/2006	+	-
10/01/2006	10/31/2006	+	-
11/01/2006	11/30/2006	+	-

Pay Calendar Table page

Calendar Generation Parameters

Pay Frequency

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

Generate Calendar

Click this button to build a pay calendar.

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

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

See Also

PeopleSoft Enterprise Global Payroll for Australia 9.0 PeopleBook, “Setting Up Global Payroll for Australia,” Entering Additional Pay Group Information

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Setting Up Administer Salary Packaging Compensation Rate Codes

Access the Comp Rate Code Table page.

When implementing Administer Salary Packaging, define and review the compensation rate codes for your salary packages on this page. When defining your salary package components and additional components, you can link them to compensation rate codes, which after the employee is enroled in the package are stored on the employee's Job Data - Compensation page (Workforce Administration, Job Information, Job Data).

Maintained Via Package Only

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

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

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

Rate codes are attached to salary package components and are enroled on the employee's Job Data - Compensation page. If the rate code is managed by salary packaging, the rate matrix functionality can not be used.

Defining Non-Salary Packaged Earnings and Deductions Elements

Access the Ern/Ded Included page.

The screenshot shows the 'Ern/Ded Included' page. At the top, there is a tab labeled 'Ern/Ded Included'. Below it, a header bar reads 'Earnings/Deductions Included in Sal Packaging Calculation'. To the right of the header are links for 'Find', 'View All', and navigation buttons for 'First', '1-3 of 3', and 'Last'. The main content area is a table with the following elements:

Element Name:		
SOCIAL		Social Club
PRDBON		Product Bonus
BONUS		Bonus

Ern/Ded Included page

Element Name

Specify the non-packaged earnings and deductions elements that you want to appear on the Package Summary page after you run the expense calculation process. You can then view the total value of any deductions, earnings, and

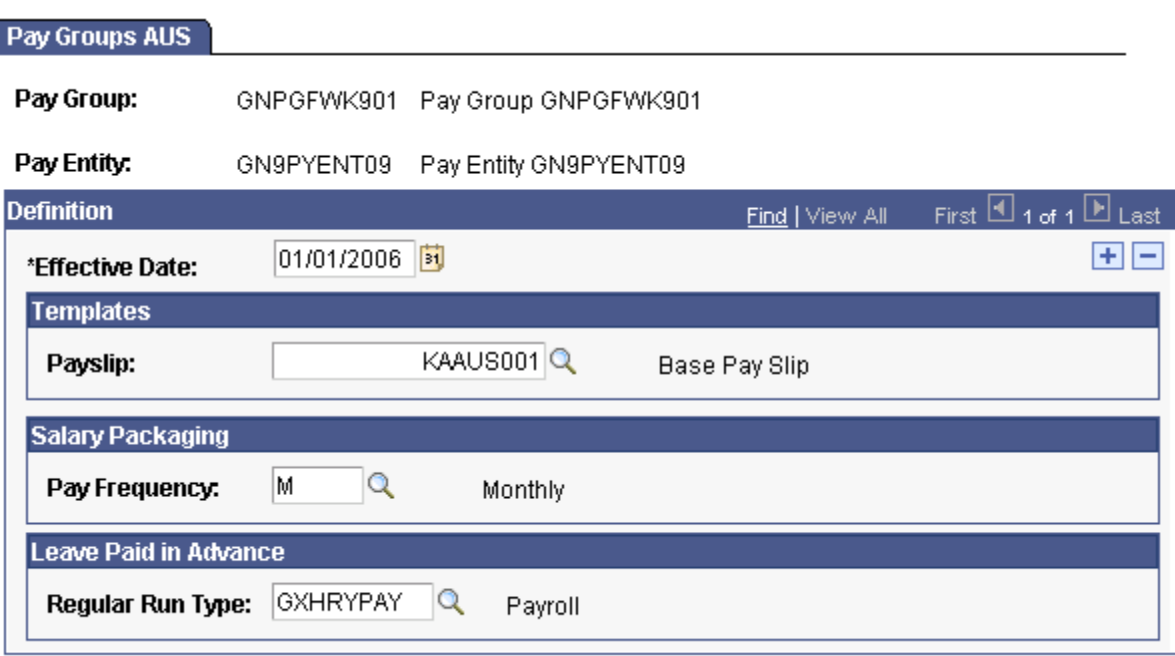
expenses that are not included as a packaged component but have been paid out to the employee in the payroll.

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

See *PeopleSoft Enterprise Global Payroll for Australia 9.0 PeopleBook*, “Monitoring Salary Packaging Expenditure,” Reviewing Salary Package Expenditures.

Defining Pay Frequencies for Salary Packaging

Access the Pay Groups AUS page.



Pay Groups AUS

Pay Group: GNPGFWK901 Pay Group GNPGFWK901

Pay Entity: GN9PYENT09 Pay Entity GN9PYENT09

Definition Find | View All First 1 of 1 Last

***Effective Date:** 01/01/2006

Templates

Payslip: KAAUS001 Base Pay Slip

Salary Packaging

Pay Frequency: M Monthly

Leave Paid in Advance

Regular Run Type: GXHRYPAY Payroll

Pay Groups AUS page

Salary Packaging

The pay frequency is used as the default value for the pay groups that are used as part of the administer salary packaging. The defined value is also retrieved by the package calendar table to divide the component totals that budgeting uses in salary packages.

Setting Up and Viewing Salary Packaging Tax Options

To set up and view salary packaging tax options, use the FBT/GST (PKG_FBT_TBL), FBT Stat Interest (PKG_FBT_INT_TBL), FBT Vehicle Rates (PKG_FBT_VEH_TBL), State Payroll Tax (PKG_PYTX_TBL), and the Tax Scales (PKG_TAX_SCALES_AUS) components.

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

In this section, we discuss how to:

- View Salary Packaging FBT and GST tax details.
- View Salary Packaging FBT statutory interest rates.
- Review Salary Packaging FBT motor vehicle statutory percentage information.
- Set Up Salary Packaging State Payroll tax options.
- Maintain PAYG tax scales used in salary package calculations.

Pages Used to Define and View Salary Packaging Tax Options

Page Name	Object Name	Navigation	Usage
FBT/GST Rate	PKG_FBT_TBL	Compensation, Salary Packaging AUS, Define Salary Packaging, Review FBT/GST Rate Table, FBT/GST Rate	View the FBT and GST rates for Australia. The GST percentage and rate for the calculation of Fringe Benefits Tax (FBT) appear.
FBT Stat Interest	PKG_FBT_INT_TBL	Compensation, Salary Packaging AUS, Define Salary Packaging, Review FBT Stat Interest Rate, FBT Stat Interest	View FBT statutory interest rates. The statutory percentage rate used in the calculation of interest payments for depreciation of motor vehicles and low interest loans appear.
FBT Vehicle Rates	PKG_FBT_VEH_TBL	Compensation, Salary Packaging AUS, Define Salary Packaging, Review FBT Stat Vehicle Rate, FBT Vehicle Rates	Review FBT motor vehicle statutory percentage information. The kilometre thresholds and the corresponding statutory percentages used in determining the taxable value of a motor vehicle appear.
State Payroll Tax	PKG_PYTX_RT_TBL	Compensation, Salary Packaging AUS, Define Salary Packaging, State Payroll Tax Rates, State Payroll Tax	Specify the payroll tax percent rate for all states where employees in a specific company are located. This page provides maintenance functions for the State Payroll Tax tables. These percentages are used in the notional calculation of tax during package modelling.
Tax Scales	PKG_TAX_SCALES_AUS	Compensation, Salary Packaging AUS, Define Salary Packaging, PAYG Tax Scales, Tax Scales	Maintain tax scales used in package calculations. Set up and view the thresholds and the percentage of tax for each threshold. Note. Use only if you have Human Resources and not Global Payroll installed. If Global Payroll is installed, the Global Payroll PAYG Tax Scales are used by Salary Packaging.

Viewing Salary Packaging FBT and GST Tax Details

Access the FBT/GST Rate page.

FBT/GST Rate

Country: AUS Australia

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

FBT/GST Rage page

FBT and GST Rates

FBT Percent (Fringe Benefits Tax percentage)

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

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

When producing payment summaries, the system has to determine if an employee has received, in the FBT year, fringe benefits with a total taxable value exceeding 1,000 AUD. A collection process totals the FBT liable earnings and, if they exceed 1,000 AUD, reports the grossed-up taxable value on the payment summary.

GST Rate

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

See Also

[Chapter 3, “Setting Up Salary Packaging,” Viewing Salary Packaging FBT Statutory Interest Rates, page 19](#)

[Chapter 3, “Setting Up Salary Packaging,” Reviewing Salary Packaging FBT Motor Vehicle Statutory Percentage Information, page 20](#)

[Chapter 3, “Setting Up Salary Packaging,” Setting Up Salary Packaging Company Payroll Tax Options, page 21](#)

[Chapter 3, “Setting Up Salary Packaging,” Maintaining Tax Scales Used in Salary Package Calculations, page 23](#)

Viewing Salary Packaging FBT Statutory Interest Rates

Access the FBT Stat Interest page.

FBT Stat Interest

Country: AUS Australia

FBT Statutory Interest Rate
[Find](#) | [View All](#)
First ◀ 1 of 4 ▶ Last

Effective Date:	04/01/1998	Status:	Active
Description:	FBT Statutory Interest Rate		
Statutory Percent:	6.700		

FBT Stat Interest page

FBT Statutory Interest Rate

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

See Also

Chapter 3, “Setting Up Salary Packaging,” Reviewing Salary Packaging FBT Motor Vehicle Statutory Percentage Information, page 20

Chapter 3, “Setting Up Salary Packaging,” Setting Up Salary Packaging Company Payroll Tax Options, page 21

Chapter 3, “Setting Up Salary Packaging,” Maintaining Tax Scales Used in Salary Package Calculations, page 23

Chapter 3, “Setting Up Salary Packaging,” Viewing Salary Packaging FBT and GST Tax Details, page 18

Reviewing Salary Packaging FBT Motor Vehicle Statutory Percentage Information

Access the FBT Vehicle Rates page.

FBT Vehicle Rates

Country: AUS Australia

FBT Vehicle Rates View All First 1 of 2 Last

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

Description: FBT Statutory Factor

GST Grossup Pct: 10.000

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

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

FBT Vehicle Rates page

FBT Vehicle Rates

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

Vehicle Statutory Percentage

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

Statutory Percent (mileage limit [kilometre/statutory percentage]) The statutory percentage rate is used in the calculation of interest payments for depreciation of motor vehicles and in the calculation of FBT for components with a component type of motor vehicle.

See Also

[Chapter 3, “Setting Up Salary Packaging,” Viewing Salary Packaging FBT Statutory Interest Rates, page 19](#)

[Chapter 3, “Setting Up Salary Packaging,” Setting Up Salary Packaging Company Payroll Tax Options, page 21](#)

[Chapter 3, “Setting Up Salary Packaging,” Maintaining Tax Scales Used in Salary Package Calculations, page 23](#)

[Chapter 3, “Setting Up Salary Packaging,” Viewing Salary Packaging FBT and GST Tax Details, page 18](#)

Setting Up Salary Packaging Company Payroll Tax Options

Access the State Payroll Tax page.

State Payroll Tax

Company: KAB Australian Business Institute

State Payroll Tax

Find | View All First 1 of 1 Last

Effective Date: 01/01/2001

State Payroll Tax

Customize | Find | View All | First 1-6 of 8 Last

State	Description	Tax Percent	Basis of Value		
ACT	Austl. Cap. Terr.	6.850		+	-
NSW	New South Wales	6.400		+	-
NT	Northern Territory	6.600		+	-
QLD	Queensland	4.900		+	-
SA	South Australia	6.000		+	-
TAS	Tasmania	6.530		+	-

State Payroll Tax page

State Payroll Tax

State/Tax Percent

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

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

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

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

See Also

[Chapter 3, "Setting Up Salary Packaging," Viewing Salary Packaging FBT Statutory Interest Rates, page 19](#)

[Chapter 3, "Setting Up Salary Packaging," Reviewing Salary Packaging FBT Motor Vehicle Statutory Percentage Information, page 20](#)

[Chapter 3, "Setting Up Salary Packaging," Maintaining Tax Scales Used in Salary Package Calculations, page 23](#)

[Chapter 3, "Setting Up Salary Packaging," Viewing Salary Packaging FBT and GST Tax Details, page 18](#)

Maintaining Tax Scales Used in Salary Package Calculations

Access the Tax Scales page.

Tax Scales

Tax Scale: 1

Tax Scale Details View All First 1 of 1 Last

'Effective Date: 06/05/2006 Status: Active

'Description:

Threshold Details Customize View All First 1 of 1 Last

Weekly Threshold Amount	A Percent	B Amt

Tax Scales page

Threshold Details

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

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

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

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

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

This page is used if you use Administer Salary Packaging without Global Payroll. If Global Payroll is used, then salary packaging uses the Global Payroll PAYG Tax Scales.

See Also

[Chapter 3, "Setting Up Salary Packaging," Viewing Salary Packaging FBT Statutory Interest Rates, page 19](#)

[Chapter 3, "Setting Up Salary Packaging," Reviewing Salary Packaging FBT Motor Vehicle Statutory Percentage Information, page 20](#)

[Chapter 3, "Setting Up Salary Packaging," Setting Up Salary Packaging Company Payroll Tax Options, page 21](#)

[Chapter 3, "Setting Up Salary Packaging," Viewing Salary Packaging FBT and GST Tax Details, page 18](#)

Setting Up Additional Salary Package Components

To set up additional salary package components, use the Additional Components (PKG_ADD_CMP_TBL) component.

This section discusses how to define salary package component liabilities.

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

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

See Also

[Chapter 3, “Setting Up Salary Packaging,” Setting Up Salary Packaging Human Resources and Global Payroll Tables, page 10](#)

Page Used to Define Additional Salary Packaging Components

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

Defining Salary Package Component Liabilities

Access the Additional Components - Additional Comp page.

Additional Comp

Additional Component: CARFBT

Additional Component Definition

Find | View All First 1 of 1 Last

Effective Date: 01/07/1986 31

Status: Active

Description: Car FBT

Short Description: Car FBT

Additional Component Type: Fringe Benefits Tax

Package Level: Total Pkg Value

Comp Rate Code: KAFB02 SP Car FBT

Additional Comp page

Additional Component Definition

Additional Component Type

The type of liability the additional component represents. Your choice determines the tax tables and rates the system references when it calculates the salary package component liability. Select *Fringe Benefits Tax*, *Goods & Services Tax*, or *Payroll Tax*.

The value you select here controls the display of the Gross Up Calculation field.

Package Level

Enables you to set how this additional component affects the employee's package. Select:

No Effect: Has no effect on the employee's package either in total employee cost or total package value. Typically used where you select *Goods & Services Tax* in the Addl Component Type field.

Total Empl Cost: Usually relates to the cost or oncost that is borne by the employer as a result of employing the employee. If you select this option, you could be indicating that the employer will pay the cost of the liability.

Total Pkg Value: Typically used where the cost or oncost is borne by the employee. An example of this would be FBT. The value of this additional component forms part of the employees overall package. Selecting this could indicate that the employee will pay the liability.

Gross up Calculation

This field appears only when you select *Goods & Services Tax* in the Additional Component Type field. The type of component this additional component relates to determines the calculation method. There are, however, no set rules for components and calculation rules. You must select one of the following options:

- *Type 1 – Tax Credit Claimed*

Note. If you select this option, the Amount field on the Employee Salary Package - Additional Comp page includes the GST gross-up amount in the FBT package value.

- *Type 2 – No Input Tax Credit*

Note. If you select this option, the Amount field on the Employee Salary Package - Additional Comp page does not include the GST gross-up amount in the FBT package value.

See [Chapter 4, “Modelling Salary Packages,” Viewing Annual Additional Salary Package Components for Employees, page 51.](#)

Input tax credits are tax credits that a company can claim back for the GST paid on the supply of a good or service. Where that good or service forms part of an employee’s salary package, the calculation of the total value of the package item changes if the company is claiming part of the cost back as an input tax credit.

Comp Rate Code
(compensation rate code)

Enables you to utilize the multiple components of pay functionality for your salary packaging. The Enrolment process creates the compensation rates on the employee’s Job Data - Compensation page. If you are using Global Payroll, you can link salary package components and additional components to different types of PeopleSoft payroll entities to facilitate the payment of earnings and deductions through your payroll system.

Note. Only compensation rate codes with the Salary Packaging check box selected on the Comp Rate Code Table can be assigned to package components and additional components. You must also define the rate code as a flat amount rate code type.

See Also

[Chapter 3, “Setting Up Salary Packaging,” Setting Up Salary Packaging Human Resources and Global Payroll Tables, page 10](#)

Setting Up Package Components

To set up package components, use the Package Components (PKG_CMPNT_TBL) component.

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

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

This section discuss how to:

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

Pages Used to Set Up Salary Package Components

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

Setting Up Salary Package Base Components

Access the Package Components - Base Component page.

The screenshot shows the 'Base Component Definition' form. At the top, there are four tabs: 'Base Component' (selected), 'Additional Comp', 'Calculated Comp', and 'Expense Data'. Below the tabs, the 'Component' is set to 'CAR'. The form title is 'Base Component Definition'. It includes a search bar with 'Find | View All' and navigation buttons 'First', '1 of 1', and 'Last'. The form fields are as follows:

- Effective Date:** 01/07/1986 (with a calendar icon)
- Status:** Active (dropdown menu)
- Description:** Car (text input)
- Short Description:** Car (text input)
- Component Type:** Motor Vehicle (dropdown menu)
- Package Level:** Total Pkg Value (dropdown menu)
- Projection Type:** Regular (dropdown menu)
- Comp Rate Code:** KASP02 (with a magnifying glass icon) and SPCar (text input)
- Add to Gross Pay:** ☐ (checkbox)
- Enrol Benefits Base:** ☐ (checkbox)
- Benefit Base Comp Rate Code:** (text input)

Package Components - Base Component page

Base Component Definition

Component Type

Determines the data the system needs when you are modelling your packages.

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

Package Level

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

Projection Type

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

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

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

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

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

Comp Rate Code
(compensation rate code)

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

Add to Gross Pay

Enables you to identify components to include in the notional calculation of PAYG tax liabilities.

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

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

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

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

See Also

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

[Chapter 3, “Setting Up Salary Packaging,” Defining Contributing Salary Package Components, page 30](#)

[Chapter 3, “Setting Up Salary Packaging,” Defining Expense Details for Salary Packaged Components, page 32](#)

Linking Additional Components with Package Components

Access the Package Components - Additional Comp page.

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

Component: CAR Car

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

Effective Date: 01/07/1986 Status: Active

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

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

Package Components - Additional Comp page

Additional Components for Component

Additional Components

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

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

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

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

See Also

[Chapter 3, “Setting Up Salary Packaging,” Setting Up Salary Package Base Components, page 27](#)

[Chapter 3, “Setting Up Salary Packaging,” Defining Contributing Salary Package Components, page 30](#)

[Chapter 3, “Setting Up Salary Packaging,” Defining Expense Details for Salary Packaged Components, page 32](#)

Defining Contributing Salary Package Components

Access the Package Components - Calculated Comp page.

The screenshot shows the 'Calculated Comp' tab of the 'Package Components' form. At the top, there are four tabs: 'Base Component', 'Additional Comp', 'Calculated Comp' (selected), and 'Expense Data'. Below the tabs, the 'Component' is set to 'CAR' and 'Car'. The 'Component Calculation Definition' section has a title bar with 'Find | View All' and 'First 1 of 1 Last'. It contains 'Effective Date: 01/07/1986', 'Status: Active', and '*Calculation Starting Value: None'. Below this is the 'Contributing Components' table with a title bar 'Find | View All' and 'First 1 of 1 Last'. The table has two columns: '*Component' and '*Effect on Component'. The table is currently empty.

Package Components - Calculated Comp page

Component Calculation Definition

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

None: If you accept this default value, the system calculates the value of the component as a percentage of the specified contributing components.

Total Pkg Value: If you use this value, the system uses this value as the starting point for the value of this component in the package that you are modelling. Any components that are then specified as contributing components add or subtract from the total package value before the component is calculated.

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

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

Contributing Components

Component Select components you have also set up using the Package Component Table pages. These components are dependent on the value of the component you are setting up.

Effect on Component Specify whether the contributing component *Adds to* or *Subtracts From* the total value of the contributing components (if there is a special effect on the component).

See Also

Chapter 3, “Setting Up Salary Packaging,” Setting Up Salary Package Base Components, page 27

Chapter 3, “Setting Up Salary Packaging,” Linking Additional Components with Package Components, page 29

Chapter 3, “Setting Up Salary Packaging,” Defining Expense Details for Salary Packaged Components, page 32

Defining Expense Details for Salary Packaged Components

Access the Package Components - Expense Data page.

The screenshot shows the 'Expense Data' tab selected. The component is 'CAR' (Car). The 'Effective Date' is 01/07/1986 and the 'Status' is Active. The 'GST Calculation' is set to 'GST Not Applicable'. The 'Payroll Type' is 'Deduction'. The 'Earnings' field is empty. The 'Deduction' field is 'SP CAR' with a search icon. The 'Expense Code' field is empty. There are also 'Find', 'View All', 'First', '1 of 1', and 'Last' controls for both the main data and the 'Expense Details' section.

Package Components - Expense Data page

GST Calculation

Defines how GST is tracked as an expense. Select:

GST Included: Indicates that the component has GST included in the value of the component. For example, if the expense amount picked up is 100 AUD, this option treats it as 91 AUD base and 9 AUD GST.

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

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

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

Payroll Type, Earnings, Deduction, and Expense Code

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

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

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

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

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

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

See Also

[Chapter 3, “Setting Up Salary Packaging,” Setting Up Salary Package Base Components, page 27](#)

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

[Chapter 3, “Setting Up Salary Packaging,” Defining Contributing Salary Package Components, page 30](#)

[Chapter 3, “Setting Up Salary Packaging,” Setting Up Additional Salary Package Components, page 24](#)

[Chapter 3, “Setting Up Salary Packaging,” Viewing Salary Packaging FBT and GST Tax Details, page 18](#)

[Chapter 5, “Managing Salary Packages,” Enrolling in Salary Packages, page 63](#)

PeopleSoft Enterprise Global Payroll for Australia 9.0 PeopleBook, “Monitoring Salary Packaging Expenditure”

Setting Up Salary Package Templates

To set up salary package templates, use the Package Template (PKG_TMPLT_TBL) component.

This section discusses how to define salary package templates.

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

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

Page Used to Set Up Salary Package Templates

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

Defining Salary Package Templates

Access the Package Template page.

Package Template

Template ID: KAMIDDLE

Template Details Find | View All First 1 of 1 Last

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

*Description: Middle Management Template

Short Description: Mid Mgmt

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

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

Package Template page

Package Components

Package Component

Enter the package components for this template that are automatically assigned to your employees as defaults when modelling their packages on the Employee Salary Package - Base Components page.

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

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

See Also

[Chapter 3, “Setting Up Salary Packaging,” Setting Up Salary Packaging Human Resources and Global Payroll Tables, page 10](#)

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

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions, “Setting Up Positions,” Creating Positions

[Chapter 4, “Modelling Salary Packages,” page 39](#)

Setting Up Salary Package Rules

To set up salary package rules, use the Package Rules (PKG_RULE_TBL) component.

This section discusses how to create salary package rules.

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

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

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

Page Used to Set Up Salary Package Rules

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

Creating Salary Package Rules

Access the Package Rule page.

Package Rule

Package Rule ID: KAMIDDLE

Rule Definition

Find | View All | First 1 of 1 Last

Effective Date: 01/07/1986

Status: Active

Description: Middle Management Rule

Short Description: Mid Mgmt

Component Rules

Customize | Find | View All | First 1-3 of 3 Last

*Package Component	*Operator	Comparison Value	*Amt or Pct	*Comparing Component	Required		
SALARY	>		Amt	Component Value	☒	+	-
SALARY	<	75,000.00	Amt	Component Value	☒	+	-
SUPSGC	>=	9.00	Pct	Component Value	☐	+	-

package Rule page

Component Rules

Package Component

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

Operator

The mathematical values used in the application of this rule.

Comparison Value

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

Amt or Pct (amount or percent)

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

Comparing Component

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

If selecting an amount, select *Component Value*.

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

Required

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

If the components of a package model do not comply with all the rules, the system issues an error message and prevents you from saving the package until you have modified the components so that they comply.

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

See Also

[Chapter 3, “Setting Up Salary Packaging,” Setting Up Salary Packaging Human Resources and Global Payroll Tables, page 10](#)

[Chapter 4, “Modelling Salary Packages,” page 39](#)

Setting Up Salary Packaging Defaults

Within PeopleSoft, there are specific pages you use to define defaults in the employee salary packaging modelling. Specify various salary packaging default values using the following pages in PeopleSoft Enterprise HRMS:

- Company Table - Default Settings—Set Up HRMS, Foundation Tables, Organization, Company.
- Job Code Table - Job Code Profile—Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table.
- Position Data - Description—Set Up HRMS, Product Related, Organizational Development, Position Management, Maintain Positions/Budgets, Add/Update Position Info.

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

In this section, we discuss how to:

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

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

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

You can also specify whether the company is liable for Payroll Tax.

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

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Setting Up Organization Foundation Tables,” Setting Default Information for Companies

Setting Up Default Package Templates and Rules for Jobs and Positions

To set up default package templates and rules for jobs and positions, use the Job Code Profile (JOB_CODE_TABL) component.

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

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

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

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

See Also

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

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Positions, “Setting Up Positions”

Setting Up Default Salary Packaging Pay Frequencies

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

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

See Also

PeopleSoft Enterprise Global Payroll for Australia 9.0 PeopleBook, “Setting Up Global Payroll for Australia,” Entering Additional Pay Group Information

CHAPTER 4

Modelling Salary Packages

This chapter provides an overview of salary package modelling and discusses how to:

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

Understanding Salary Package Modelling

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

Modelling occurs at the employee level and is an employee-specific process. If you're modelling packages for employees, use the Employee Salary Package pages. If you're using PeopleSoft Enterprise Talent Acquisition Manager, you can also model salary packages for applicants using the Applicant Model pages.

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

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

See Also

[Chapter 3, “Setting Up Salary Packaging,” Setting Up Salary Packaging Human Resources and Global Payroll Tables, page 10](#)

[Chapter 3, “Setting Up Salary Packaging,” Setting Up Additional Salary Package Components, page 24](#)

[Chapter 4, “Modelling Salary Packages,” Modelling Salary Packages for Employees, page 40](#)

[Chapter 4, “Modelling Salary Packages,” Modelling Salary Packages for Applicants, page 56](#)

Common Elements Used in This Chapter

Total Employment Cost (TEC)

Displays the value of salary packages at two different levels. This level represents the cost to the employer.

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

Modelling Salary Packages for Employees

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

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

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

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

This section discusses how to:

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

Pages Used to Model Salary Packages for Employees

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

Defining Employee Salary Package Details

Access the Employee Salary Package - Package Model page.

Package Model		Base Components	Additional Comp	Base Comp (Per)	Addnl Comp (Per)
Justin Whitford		ID: KA0014		Empl Rcd#: 0	
Package Definition Find View All First 1 of 1 Last					
Effective Date:	01/01/2004	Department:	25000		
Model Number:	0	Job Code:	620000		
Package Start Date:	01/01/2004	Package Status:	Current		
Package End Date:	12/31/2004	☒ Confirmed	☐ De-enrolled		
		Review Date:	12/31/2004		
Salary Package Details					
Currency Code:	AUD	Australian Dollar			
Tax Scale:	7	Tax Free Threshold (No Loading)		Payroll Tax State:	NSW
Template ID:	KASENIOR	Senior Management Template			
Rule ID:	KASENIOR	Senior Management Rule			
Package Method:	Middle Out	Target TPV:	170000.00		

Employee Salary Package - Package Model page

Package Definition

Package Start Date and Package End Date

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

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

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

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

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

Confirmed

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

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

De-enrolled

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

Review Date

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

Salary Package Details**Tax Scale**

Part of the modelling process is the calculation of the employee's Pay As You Go (PAYG) tax liability. The tax scale is used in the notional online calculation of the gross to net value of the package.

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

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

Payroll Tax State

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

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

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

Template ID and Rule ID

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

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

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

Package Method

The method of packaging used when modelling. Select:

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

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

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

Target TPV or Target TEC

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

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

See Also

[Chapter 3, "Setting Up Salary Packaging," Maintaining Tax Scales Used in Salary Package Calculations, page 23](#)

[Chapter 3, "Setting Up Salary Packaging," Setting Up Salary Package Templates, page 33](#)

[Chapter 3, "Setting Up Salary Packaging," Setting Up Salary Package Rules, page 35](#)

[Chapter 5, "Managing Salary Packages," Confirming Salary Packages, page 62](#)

[Chapter 4, "Modelling Salary Packages," Modelling Salary Packages for Applicants, page 56](#)

Setting Up Annual Base Components for Employees

Access the Employee Salary Package - Base Components page.

Package Model		Base Components		Additional Comp		Base Comp (Per)		Addtnl Comp (Per)		Salary/Tax	
Justin Whitford				ID: KA0014		Empl Rcd#: 0					
Package Base Components Find View All First 1 of 1 Last											
Effective Date: 01/01/2004		Model Number: 0		Package Status: Current							
Package Components Find View All First 1-4 of 4 Last											
		From	To	TPV	TEC	Bal	Dtls	Bud			
BONUS	Bonus	01/01/2004	12/31/2004	18858.69	20065.65	☐	☐	☐			
CAR	Car	01/01/2004	12/31/2004	10958.42	11659.76	☐	☐	☐			
SALARY	Salary	01/01/2004	12/31/2004	125724.56	133770.93	☒	☐	☐			
SUPSGC	SGC Super	01/01/2004	12/31/2004	14458.33	15383.66	☐	☐	☐			
Package Annual Total											
Target Total TPV/TEC:				170000.00							
Current TPV/TEC:				170000.00		180880.00					
C/F Target TPV/TEC:											
Balance Total TPV/TEC:				0.00							

Employee Salary Package - Base Components page

Package Base Components

Package Components

As part of the package template you specify for this employee on the Employee Salary Package - Package Model page, all of the components that you defined on the Package Template page appear by default. Add new components or remove any default components from the package model for the employee.

Create components using the Package Components pages.

From and To (dates)

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

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

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

TPV and TEC

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

Bal (balance)

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

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

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

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

Dtls (details)

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

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

Most of the details are required to support the calculation of the Fringe Benefits Tax (FBT) and Goods and Services Tax (GST) liability, and subsequently, the component value.

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

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

Bud (budget)

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

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

Package Annual Total

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

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

The Package Annual Total group box displays the target total TPV/TEC, the current TPV/TEC, and the balance total TPV/TEC. The C/F (carry

forward) target TPV/TEC also appears, but it is only relevant when making effective-dated changes to a confirmed package.

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

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

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

See Also

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

[Chapter 4, “Modelling Salary Packages,” Modelling Salary Packages for Applicants, page 56](#)

[Chapter 3, “Setting Up Salary Packaging,” page 9](#)

[Chapter 4, “Modelling Salary Packages,” Modelling Salary Packages for Applicants, page 56](#)

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

[Chapter 4, “Modelling Salary Packages,” Entering Package Component Details, page 47](#)

Entering Package Component Details

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

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

Salary Packaging Details Fields

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

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

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

Entering Motor Vehicle General Details

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

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

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

Entering Car Parking FBT Details

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

FBT Calculation Method

There are two different methods of calculation for the FBT liability on a car parking benefit:

Market Value: The Car Parking FBT Market Value Method Details page appears, enabling you to enter and calculate FBT details according to the market value of the car park, when the car parking is leased on the employee's behalf or on the employer's site.

Commercial Parking Station: The Car Parking FBT Commercial Station Method Details page appears, enabling you to enter and calculate FBT details when the car parking is paid for as an ongoing, daily benefit through a parking station for the employee.

After you select a method and click OK, another page appears and prompts for other details related to the component.

Market Value (annual)

Enter the estimated market value of the car parking. For example, an employer pays Star's Property Management 3,000 AUD per year for the leasing of the car park on the employee's behalf. An independent evaluation of the market value of the car park has been quoted at 2,200 AUD. The employer wants to pass on the total cost of the car park to the employee.

When calculating the FBT on the car park component, tax is payable only on the market value of the car park—in this case 2,200 AUD. The employee makes no contribution for the benefit and no tax exemption applies.

In the Tax Adjustment Amount (Annual) field, enter 800 AUD, which is the difference between the market value and the cost to the employer.

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

See Also

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

[Chapter 4, "Modelling Salary Packages," Entering Salary Package Component Budget Details for Employees, page 49](#)

Entering Salary Package Component Budget Details for Employees

Access the Employee Salary Package - Budget Entry page.

Budget Entry

Period End	Budget	Actual
01/31/2005	1571.56	
02/28/2005	1571.56	
03/31/2005	1571.56	
04/30/2005	1571.56	
05/31/2005	1571.56	
06/30/2005	1571.56	
07/31/2005	1571.56	
08/31/2005	1571.56	
09/30/2005	1571.56	
10/31/2005	1571.56	
11/30/2005	1571.56	
12/31/2005	1571.53	

Current Total: 18858.69
Total Req'd: 18858.69
Remainder:

Employee Salary Package - Budget Entry page

Period End

The default budget assumes a regular rate of expenditure for each period end (pay period) in the package period. The pay periods are determined using the employee's pay group and the applicable salary packaging pay calendar records in Global Payroll. For any partial periods, the amount budgeted is pro-rated to reflect the value applicable for the partial period.

Budget and Actual

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

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

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

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

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

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

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

See Also

Chapter 4, “Modelling Salary Packages,” Setting Up Annual Base Components for Employees, page 44

Viewing Annual Additional Salary Package Components for Employees

Access the Employee Salary Package - Additional Comp page.

Package Model	Base Components	Additional Comp	Base Comp (Per)	Addnl Comp (Per)	Salary/Tax
Justin Whitford		ID: KA0014	Empl Rcd#: 0		
Package Definition Find View All First 1 of 1 Last					
Effective Date: 01/01/2004		Model Number: 0	Package Status: Current		
Package Components Find View All First 1 of 4 Last					
Component: BONUS Bonus		☒ Add to Gross Pay			
Additional Components Find View All First 1 of 1 Last					
	Type	Amount	Enroll Amount	Adds To TPV	Adds To TEC
BONPRT	Bonus PRT Payroll Tx	1206.96	1206.96		1206.96
Base Component Amount TPV/TEC:				18858.69	18858.69
Component Total TPV/TEC:				18858.69	20065.65
Package Total					
Target Total TPV/TEC:				170000.00	
Current TPV/TEC:				170000.00	180880.00
C/F Target TPV/TEC:					
Balance Total TPV/TEC:				0.00	

Employee Salary Package - Additional Comp page

Package Components

Add To Gross Pay

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

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

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

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

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

Additional Components

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

Type

For each component, additional components may exist for FBT, GST, and payroll tax. This information appears here.

Amount

Displays amount calculated for component.

For FBT, displays the FBT package value with or without including the GST gross-up value if the Gross Up Calculation method is set to *Type 1 - Tax Credit Claimed* on the Additional Components - Additional Comp page (Compensation, Salary Packaging AUS, Define Salary Packaging, Additional Components). If the Gross Up Calculation method is set to *Type 2 - No Input Tax Credit* on this page, the GST gross-up amount is not included.

Enroll Amount

This amount is the amount passed to the employee's compensation record when the Salary Packaging enrolment process is run.

For FBT, displays the FBT package value but does not include the GST gross-up amount.

Note. The Enroll Salary Packaging process uses the Enroll Amount value when it creates the employee's compensation record. The payroll process as well as the Collect FBT Earns AUS and Payment Summary processes use this value when calculating the FBT reportable earnings for the employee's Payment Summary Certificate.

Note. The Enroll Amount field may or may not be the same as the amount displayed in the Amount field. If the Gross Up Calculation method is set to *Type 2 - No Input Tax Credit* on the Additional Components - Additional Comp page (Compensation, Salary Packaging AUS, Define Salary Packaging, Additional Components), the GST gross-up is not included in the Amount field and there is therefore no difference between the Amount and the Enroll Amount.

**Adds To TPV and Adds
To TEC**

Controlled by the setup of the additional component, where you specify if the additional component Adds To TPV or TEC.

For example, the calculated FBT liability for a car parking component might be 2,216.94 AUD. This appears in both the Adds to TPV and Adds to TEC fields. All values adding to TPV add to TEC (the TEC is inclusive of all TPV values).

The payroll tax liability might be calculated as 164.78 AUD. This value appears only under the Adds to TEC field because the component definition indicates the package level for this additional component to be TEC (which means it has no effect on TPV).

Package Total

Target Total TPV/TEC,
Current TPV/TEC, C/F
Target TPV/TEC, and
Balance Total TPV/TEC

These totals are consistent with those shown on the Base Components page, identifying the target, current, and balance totals for TPV and TEC.

See Also

Chapter 3, “Setting Up Salary Packaging,” Setting Up Additional Salary Package Components, page 24

Chapter 3, “Setting Up Salary Packaging,” Setting Up Package Components, page 26

Setting Up Period Base Components for Employees

Access the Employee Salary Package - Base Comp (Per) page.

Package Model	Base Components	Additional Comp	Base Comp (Per)	Addnl Comp (Per)	Salary/Tax	
Justin Whitford		ID: KA0014	Empl Rcd#: 0			
Package Base Components View All First 1 of 1 Last						
Effective Date: 01/01/2004		Model Number: 0	Package Status: Current			
Package Components Find View All First 1-4 of 4 Last						
		From	To	TPV	TEC	Bal Dtls Bud
BONUS	Bonus	01/01/2004	12/31/2004	18858.69	20065.65	☐
CAR	Car	01/01/2004	12/31/2004	10958.42	11659.76	☐
SALARY	Salary	01/01/2004	12/31/2004	125724.56	133770.93	☒
SUPSGC	SGC Super	01/01/2004	12/31/2004	14458.33	15383.66	☐
Package Effective Period Total						
Target Total TPV/TEC:				170000.00		
Current Total TPV/TEC:				170000.00	180880.00	
C/F Target TPV/TEC:						
Balance Total TPV/TEC:				0.00		

Employee Salary Package - Base Comp (Per) page

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

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

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

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

See Also

Chapter 4, "Modelling Salary Packages," Setting Up Annual Base Components for Employees, page 44

Viewing Additional Period Components for Employees

Access the Employee Salary Package - Addtnl Comp (Per) page.

Package Model	Base Components	Additional Comp	Base Comp (Per)	Addtnl Comp (Per)	Salary/Tax
Justin Whitford		ID: KA0014		Empl Rcd#: 0	
Package Definition Find View All First 1 of 1 Last					
Effective Date: 01/01/2004		Model Number: 0		Package Status: Current	
Package Components Find View All First 1 of 4 Last					
Component: BONUS Bonus		☒ Add to Gross Pay			
Additional Components Find View All First 1 of 1 Last					
	Type	Amount	Adds To TPV	Adds to TEC	
BONPRT	Bonus PRT Payroll Tx	1206.96		1206.96	+ -
Base Component Amount TPV/TEC:			18858.69	18858.69	
Component Total TPV/TEC:			18858.69	20065.65	
Package Total					
Target Total TPV/TEC:			170000.00		
Current Total TPV/TEC:			170000.00	180880.00	
C/F Target TPV/TEC:					
Balance Total TPV/TEC:			0.00		

Employee Salary Package - Addtnl Comp (Per) page

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

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

See Also

[Chapter 4, “Modelling Salary Packages,” Viewing Annual Additional Salary Package Components for Employees, page 51](#)

Viewing Package Component PAYG Tax Liabilities for Employees

Access the Employee Salary Package - Salary/Tax page.

Base Components

Additional Comp

Base Comp (Per)

Addnl Comp (Per)

Salary/Tax

Justin Whitford

ID: KA0014

Empl Rcd#: 0

Salary Details

Find | View All First 1 of 1 Last

Effective Date: 01/01/2004

Model Number: 0

Package Status: Current

Tax Scale: 7

Salary

	Gross Salary	Tax	Net Salary
Yearly	144583.25	56973.44	87609.81
Monthly	12048.60	4747.79	7300.82
Semi-monthly	6024.30	2373.89	3650.41
Fortnightly	5560.89	2191.29	3369.61
Weekly	2780.45	1095.64	1684.81

Employee Salary Package - Salary/Tax page

Salary Details

Salary

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

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

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

See Also

[Chapter 4, “Modelling Salary Packages,” Defining Employee Salary Package Details, page 41](#)

Modelling Salary Packages for Applicants

If you use PeopleSoft Enterprise Recruiting Solutions to track and administer applicants, you can create a salary package for applicants before you hire them.

After you hire the applicant, Recruiting Solutions can copy the applicant salary package information into their employee record.

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

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

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

See Also

[Chapter 4, “Modelling Salary Packages,” Modelling Salary Packages for Employees, page 40](#)

[Chapter 5, “Managing Salary Packages,” Confirming Salary Packages for Applicants on Hire, page 62](#)

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

[Chapter 4, “Modelling Salary Packages,” Entering Package Component Details, page 47](#)

Pages Used to Model Salary Packages for Applicants

Page Name	Object Name	Navigation	Usage
Find Applicants - Applicant Model	HRS_PKG_MDL_APP	Recruiting, Find Applicants, Find Applicants Click the Find Applicants button on the Find Applicants page. Select <i>Create Salary Package Model</i> in the Take Action field for the specified applicant.	Record applicant salary packages.
Find Applicants - Base Components	HRS_MDL_BSE_CM_APP	From the Find Applicants - Applicant Model page, select the Base Components page.	Enter base component details that drive package value calculations on an annual basis for applicants.
Find Applicants - Budget Entry	PKG_MDL_BUDGET_APP	From the Find Applicants - Base Components page, click the Bud button.	Set up a budget for the planned expenditure of a component for applicants.
Find Applicants - Additional Components	HRS_MDL_ADD_CM_APP	From the Find Applicants - Applicant Model page, select the Additional Components page.	View the additional component values for applicants, expressed as an annual value, associated with the prior page.
Find Applicants - Period Base Components	HRS_MDL_BSE_PE_APP	From the Find Applicants - Applicant Model page, select the Period Base Components page.	Enter base component details (for applicants) that drive package value calculations on a prorated basis—in other words, the actual value of the component for the period for which it is effective.
Find Applicants - Period Additional Components	HRS_MDL_ADD_PE_APP	From the Find Applicants - Applicant Model page, select the Period Additional Components page.	View the additional component values (for applicants) (expressed as an annual value) associated with the prior page.
Find Applicants - Salary and Taxes	HRS_MDL_SAL_NT_APP	From the Find Applicants - Applicant Model page, select the Salary and Taxes page.	View the impact to the applicant's salary and tax obligations based on the package model.

Defining Applicant Salary Packages

Access the Find Applicants - Applicant Model page.

Applicant Model	Base Components	Additional Components	Period Base Components	Period Additional Components
Name: Jan Miller		ID: A0000045	Empl Rcd#: 999	
Package Definition Find View All First 1 of 1 Last				
*Effective Date: 10/04/2006		Department:		
Model Number: 0		Package Status: Proposed		
Package Start Date: 10/04/2006		*Package End Date: 10/03/2007		
Salary Package Details				
Company:		Pay Group:		
*Currency: USD US Dollar				
Job Code:				
*Tax Scale:		*Payroll Tax State:		
Template ID:				
Rule ID:				
*Package Method: Bottom Up				

Find Applicants - Applicant Model page

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

Package Definition

Package Status

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

Company

Select the company with the vacant position or job.

Job Code

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

Tax Scale and Payroll Tax State

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

See Also

[Chapter 4, "Modelling Salary Packages," Defining Employee Salary Package Details, page 41](#)

[Chapter 4, "Modelling Salary Packages," Modelling Salary Packages for Employees, page 40](#)

[Chapter 5, "Managing Salary Packages," Confirming Salary Packages for Applicants on Hire, page 62](#)

Copying Applicant Salary Packages to the Employee Salary Package Component

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

This section lists the page used to copy applicant salary packages to the Employee Salary Package component.

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

Page Name	Object Name	Navigation	Usage
Find Applicants - Copy Applicant to Employee	HRS_PKG_APP_CPY	Click the Find Applicants button on the Find Applicants page. Select <i>Copy Applicant to Employee</i> in the Take Action field for the specified applicant.	Copy applicant salary packages over to the Employee Salary Package component. The Copy to Employee ID is the ID you created when the applicant was hired. When you select the Confirm Copy check box, the applicant's ID and salary package are copied over to the Employee Salary Package component. This enables you to then view and confirm the applicant's package details as an employee.

See Also

[Chapter 5, "Managing Salary Packages," Confirming Salary Packages, page 62](#)

CHAPTER 5

Managing Salary Packages

This chapter provides an overview of managing salary packages and discusses how to:

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

Understanding Managing Salary Packages

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

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

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

See Also

[Chapter 5, "Managing Salary Packages," Confirming Salary Packages, page 62](#)

[Chapter 5, "Managing Salary Packages," Enrolling in Salary Packages, page 63](#)

PeopleSoft Enterprise Global Payroll for Australia 9.0 PeopleBook, "Monitoring Salary Packaging Expenditure," Reviewing Salary Package Expenditures

Common Elements Used in This Chapter

Package Enrolment

This process enrolls compensation rates on the Job Data Compensation page for all employees with a confirmed package. This process saves you the administrative overhead of updating each of the employee's records after a package has been confirmed.

De-enrolment

The process of removing an employee from a salary package.

Confirming Salary Packages

This section discusses how to:

- Confirm salary packages for employees.
- Confirm salary packages for applicants on hire.

Confirming Salary Packages for Employees

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

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

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

See Also

[Chapter 4, “Modelling Salary Packages,” page 39](#)

[Chapter 5, “Managing Salary Packages,” Enrolling in Salary Packages, page 63](#)

[Chapter 5, “Managing Salary Packages,” De-enrolling from Salary Packages, page 67](#)

Confirming Salary Packages for Applicants on Hire

If you have been tracking and administering job applicants using Recruiting Solutions, you don’t have to re-enter all of the information you have already entered in the system when you hire an applicant. After the applicant is hired and you have created the applicants, the system can copy the applicant’s information into the applicant’s employee record.

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

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

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

See Also

[Chapter 4, “Modelling Salary Packages,” Copying Applicant Salary Packages to the Employee Salary Package Component, page 59](#)

[Chapter 4, “Modelling Salary Packages,” Modelling Salary Packages for Applicants, page 56](#)

Enrolling in Salary Packages

This section provides an overview of salary packages and discusses how to enroll in salary packages.

Understanding Salary Packages

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

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

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

Enrolling Employees in Salary Packages

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

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

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

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

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

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

Page Used to Enrol in Salary Packages

Page Name	Object Name	Navigation	Usage
Package Enrolment	RUNCTL_PKG001	Compensation, Salary Packaging AUS, Create Salary Packaging, Enroll Salary Package, Package Enrolment	Run the Salary Package Enrolment PSJob process (HRAU_SPE) to enrol an employee or pay group in a salary package. Note. To run the Package De-enrolment process, navigate to Compensation, Salary Packaging AUS, Create Salary Packaging, De-Enroll Salary Package, Package De-enrollment. The two pages are identical.

Enrolling in Salary Packages

Access the Package Enrolment page.

Package Enrolment page

By Employee ID

Select to enrol an employee in a salary package. When this option is selected, the EmplID (employee identification) and Empl Rcd# (employee record number) fields are activated.

By Pay Group

Select to enrol a pay group in a salary package. When this option is selected, the Pay Group field is activated.

Reviewing Salary Packages

In this section provides an overview of salary package reviews and discusses how to:

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

Understanding Salary Package Reviews

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

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

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

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

Identifying Salary Packages Due for Review

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

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "PeopleSoft Application Fundamentals for HRMS Reports," Administer Salary Packaging Reports

Remodelling the Employee's Salary Package

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

- Reconciling expenditure.
- Remodelling the salary package.

Reconciling Expenditure

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

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

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

Remodelling the Salary Package

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

To remodel a salary package for an employee:

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

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

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

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

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

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

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

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

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

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

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

See Also

PeopleSoft Enterprise Global Payroll for Australia 9.0 PeopleBook, "Monitoring Salary Packaging Expenditure"

Chapter 5, "Managing Salary Packages," Enrolling in Salary Packages, page 63

De-enrolling from Salary Packages

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

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

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

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

De-enrolling Employees from Salary Packages

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

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

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

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

See Also

PeopleSoft Enterprise Global Payroll for Australia 9.0 PeopleBook, “Monitoring Salary Packaging Expenditure”

[Chapter 5, “Managing Salary Packages,” Enrolling in Salary Packages, page 63](#)

[Chapter 4, “Modelling Salary Packages,” Defining Employee Salary Package Details, page 41](#)

Page Used to De-enroll from Salary Packages

Page Name	Object Name	Navigation	Usage
Package De-enrolment	RUNCTL_PKG001	Compensation, Salary Packaging AUS, Create Salary Packaging, De-Enroll Salary Package, Package De-enrolment	Run the Salary Package De-Enroll PSJob process (HRAU_SPD) to de-enroll an employee or a pay group from a salary package. Note. To run the Package Enrollment process navigate to Compensation, Salary Packaging AUS, Create Salary Packaging, Enroll Salary Package, Package Enrolment. The two pages are identical.

De-enrolling from Salary Packages

Access the Package De-enrolment page.

Package De-enrolment page

By Employee ID

Select to de-enrol an employee in a salary package. When this option is selected, the EmplID and Empl Rcd# fields are activated.

By Pay Group

Select to de-enrol a pay group in a salary package. When this option is selected, the PayGroup field is activated.

Making Effective-Dated Changes to Confirmed Salary Packages

This section discusses how to:

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

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

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

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

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

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

1. Access the current salary package by using the Package Model page in the Employee Salary Package component.
2. Insert a new effective-dated row.
3. Modify the effective date to indicate the effective date of the change you are making.
The effective date controls whether you are making a change to an existing package or model a new package.
4. If you are making an effective-dated change to an existing package, the effective date must be between the package start and end dates of the existing package.
5. If you make an effective-dated change where the effective date is equal to the effective date of a package that is already confirmed, use the model number to show that this is a later change.

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

Changing Existing Packages and Modelling New Packages

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

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

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

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

See Also

PeopleSoft Enterprise Global Payroll for Australia 9.0 PeopleBook, “Monitoring Salary Packaging Expenditure”

Working with Budgets and the Carry Forward Amounts

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

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

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

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

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

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

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

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

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

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

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

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

120,000 AUD/ 12 (months in year) x 2 (months elapsed) = 20,000 AUD

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

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

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

See Also

[Chapter 4, "Modelling Salary Packages," Entering Salary Package Component Budget Details for Employees, page 49](#)

[Chapter 4, "Modelling Salary Packages," Modelling Salary Packages for Applicants, page 56](#)

[Chapter 4, "Modelling Salary Packages," Setting Up Annual Base Components for Employees, page 44](#)

[Chapter 4, "Modelling Salary Packages," Setting Up Period Base Components for Employees, page 53](#)

Running Salary Packaging Reports

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

Pages Used to Run the Salary Packaging Reports

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

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports”

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

	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

	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 <i>receivables specialist</i> . 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."

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 <i>detailed business process</i>.
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.

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 <i>course</i> .
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft 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 <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>division</i> .

collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, 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 <i>communication key</i> .
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft 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

	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 <i>class</i> .
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft 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 <i>drop ship</i>).
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 <i>population</i> and <i>cohort</i>.
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft 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 <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set	In PeopleSoft 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.

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 <i>donor pyramid</i> 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 <i>Global Distribution System</i> . Broad-based term to describe all computer reservation systems for making travel plans.
GL business unit	Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
GL Interface process	Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
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.

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 <i>update access</i> .
institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
integration	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft 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 <code>ADVANCED_SHIPPING_ORDER</code> 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 <i>pending reservations</i> . Reservations that have been paid for are referred to as <i>confirmed reservations</i> .
joint communication	In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

keyword	In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft 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 <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
KVI	Abbreviation for <i>Known Value Item</i> . 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 <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . 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 <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
line	In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
LMS	Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft 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 <i>1</i> —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 <i>3C engine</i> .
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 <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft 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.

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 <i>Non-Discountable Products</i> . 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 <i>need analysis</i> .
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 <i>compensation object</i> .
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.

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 <i>event</i> .
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
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

	Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also <i>division</i> and <i>cohort</i> .
portal registry	In PeopleSoft 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.

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 <i>giveaways</i>).
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.

publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft 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 <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft 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.

REN server	Abbreviation for <i>real-time event notification server</i> 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 <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.
seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
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.

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 <i>communication key</i> .
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft 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.

summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft 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.

travel group	In PeopleSoft Expenses, the organization's travel rules and policies 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 <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
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 <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft 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.

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 <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This term refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft 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 <i>eXtended Process Integrator</i> . PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.

yield by operation

In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT

Abbreviation for *zero-rated value-added tax*. A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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